



**Voyager<sup>®</sup>**  
**ImageServer User's Guide**

July 2011

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<b>INTRODUCTION</b>	<b>5</b>
<b>SYMTRIX.INI FILE</b>	<b>5</b>
<b>IMAGESERVER CLIENT SET UP</b>	<b>6</b>
<b>IMAGESERVER CHECKLIST</b>	<b>8</b>
PC Settings .....	8
Server Settings.....	9
Scanning Hardware and Software.....	9
<b>DEFINING APPLICATION REQUIREMENTS</b>	<b>11</b>
Accessing Application Maintenance .....	12
To access the Maintenance program:.....	12
Adding New Applications.....	14
Application Settings.....	17
System Security Setup Screen.....	19
Indexes/Sorting Tab .....	20
Fields Mapping Tab.....	21
To assign the MARC Mappings:.....	21
MARC Mapping Sequence.....	22
<b>ASSIGNING APPLICATION STORAGE AREAS</b>	<b>23</b>
To assign a storage location: .....	24
Maintaining Applications.....	25
To change a document description: .....	25
To delete a document description: .....	25
Deleting Applications.....	25
To delete an application: .....	26
<b>SYSTEM SECURITY SETUP</b>	<b>27</b>
Defining Staff Users.....	27
To add a new staff user:.....	28
To modify staff user profile information: .....	29
To delete a staff user: .....	29
Creating Staff User Groups .....	29
To establish a staff user group: .....	30
WARNING: Never allow staff users the option to change their password.....	31
To delete a staff user group: .....	32
Access Authorization and Control .....	32
To authorize staff user groups to applications:.....	32
Access Levels for Applications and Groups in ImageMaintenance.....	32
To edit folder access levels for groups and applications in ImageMaintenance:.....	33
Access Levels for Folders in ImageServer.....	33
To edit folder access levels in ImageServer:.....	34
Quick Authorize .....	34
<b>ACCESSING ADMINISTRATIVE FUNCTIONS</b>	<b>37</b>
<b>MAINTAIN FOLDERS</b>	<b>39</b>
To access Folder Maintenance: .....	39
To edit folder index data:.....	40
To delete a folder: .....	40
To view Images: .....	40
To delete an image in a folder:.....	41
To move an image file within one 856 tag of multiple image files:.....	41
To move an image file to other folders: .....	41

To copy an image file to another folder: .....	42
To change an image filename: .....	43
<b>FIND FOLDERS - ADVANCED FOLDER SEARCHES - USE FOR QUALITY CONTROL</b>	<b>44</b>
To use the Find Folder function:.....	44
<b>AUDIT REPORTING</b>	<b>46</b>
<b>IMAGESERVER INTEGRATION WITH CATALOGING</b>	<b>47</b>
<b>KEYBOARD SHORTCUTS</b>	<b>48</b>
How to send all documents to open bibliographic record: .....	51
How to create a new bibliographic record for selected document(s): .....	52
How to send all documents to a new bibliographic record: .....	53
To start the OCR process: .....	55
Text Verification .....	58
MARC Mapping for OCR text.....	59
<b>INDEX</b>	<b>61</b>

# Introduction

Included below is the following information:

- Symtrix.ini file
- ImageServer client setup information
- ImageServer post-installation checklist

## Symtrix.ini File

### [Site Information]

SiteName=Voyager ImageServer

### [Database Setup]

DatabaseName32=Auto ; do not change

DB\_Connect=Auto ; do not change

UseDefaultLogin=Yes ; do not change

### [Registration]

RegisterHost=xxx.xxx.xxx.xxx ; your server's IP address

RegisterPort=NNNN ; use 7500 if only one Image Server database

database ; use a different port for each ImageServer

### [Message Timers]

CheckForNewMessages=1 ; specify time in minutes

PurgeExpiredMessages=5 ; specify time in minutes

### [Environment]

ToolBar=-1 ; do not change

### [Import Manager]

RunFrequency=6 ; do not change

### [Full Text OCR]

VerifierThreshold=100 ; valid values are between 0 and 999 (See ImageServer Client Setup)

### [Settings]

ThumbnailAllPages=NO

# ImageServer Clients Set Up

The installation instructions for ImageServer and ImageMaintenance are as follows:

1. Before beginning the actual installation process for the new version of ImageServer, you will need to install the latest patch for Oracle ODBC drivers version 8.0.5.0 or 8.0.5.2. At this time the patch is 8.0.5.7.0. To install the patch, unzip the `OraPatch.zip` file and follow the instructions in the accompanying “read me” file.

**Note:** The previous version of ImageServer also required version 8.0.5.7.0. This means that if you are upgrading from ImageServer 3.5, you may not need to perform this step. To verify the version of the ODBC drivers that you have installed, run the Oracle Installer from the Oracle folder. If Oracle ODBC Driver 8.0.5.7.0 appears in the Installed Products window, you do **not** need to install the drivers patch. Otherwise you must install the patch.

2. If this is a new install (i.e., no previous version of Symtrix on the PC), skip this step and proceed to Step 3. This version does not include online help files, so if you want to use your existing help and `.cnt` files, you must copy them to a different directory before installing ImageServer.

**Note:** These help files are not Voyager-specific help files; thus, their content has not been tailored to be Voyager-specific. While the information is correct (as of ImageServer 3.5), it does not supply any Voyager-specific context. For more Voyager-specific information, see the ImageServer manual. (A PDF version of the manual is included as part of the standard installation.)

3. Run the `Setup.exe` file to install the ImageServer clients in your Symtrix directory. This version does not install online help files. This install will require approximately 90 MB of free disk space. During installation, the `setup.ini` file **must be** in the same folder as the `setup.exe` file.

**Note:** By default, both ImageServer and ImageServer Maintenance will be installed. If you do not want the ImageServer Maintenance to be installed, you must open the `setup.ini` file and set the Maintenance variable to False. Then, when the `Setup.exe` file is run, only ImageServer will be installed.

4. Unzip the `ImageServer_Misc.zip` file. Once the file is unzipped:
  - a) Copy the `HighBitAsciiOracle.reg` file to anywhere on your hard drive. Double-click on the file to run it. This will ensure proper Oracle settings on your local machine. **Note:** Not having these Oracle settings will result in the **Invalid Password** error message when you log into ImageServer.

- b) Copy the `SymScan.ini` file to your Symtrix directory.
- c) Copy the `Symtrix.lic` file to your Symtrix directory.
  
- d) Copy the `Symtrix.ini` file to your Symtrix directory and modify it as follows:
  - i) Fill out the `[Registration]` stanza. **RegisterHost** should be set to be your IP address. **RegisterPort** will be 7500 but will need to be changed if your institution has multiple Image Server databases on the same server.
  - ii) **Do not** remove the `[Full Text OCR]` stanza. It is required to perform OCR functions.
  - iii) **Do not** modify the “Auto” settings in the `DatabaseName32` and `DB_Connect` parameters.

- 5. Unzip the `ImageServer_Doc.zip` file. This file contains the user’s manual for ImageServer and ImageMaintenance in PDF format.

You may browse it using Acrobat Reader.

- 6. If you are upgrading from 3.5 and wish to continue using those online help files, then copy the saved `.hlp` and `.cnt` files from step 2 into the Symtrix folder.

# ImageServer Checklist

Following are PC and server settings that must be defined after the installation of the ImageServer client to enable ImageServer's full interaction with Voyager. In addition, there is a section on scanning hardware/software.

## PC Settings

1. Verify the values in the `symtrix.ini` file (found in the `symtrix` folder on your PC). The `symtrix.ini` that is used for Image Server version 3.8 has changed. It is recommended that you use the `symtrix.ini` that comes with your installation package.

See the sample `symtrix.ini` file on page 5. Your settings should match those of the sample file.

2. To view ImageServer links from the Cataloging client via the **Record/Verify Links** function, the **ImageServer Path** in the **Options>Preferences** in Cataloging must be set to either:

- a) `http://<your.host.name.here:optionalport>/cgi-bin/scandoc.cgi`  
OR
- b) `c:\symtrix\iadms.exe`

3. To send OCR data from ImageServer to Cataloging, you may override the default MARC mapping values on the **Validation** tab in the **Options>Preferences** section of the Cataloging client. The default mapping is field 500 subfield "a".

4. To view ImageServer links from the Windows OPAC, the following stanza needs to be in the `opac.ini` file located in the **Voyager>Opac** folder:

```
[Image Server]
Program=<URL of scandoc.cgi> (as in 2.a above) OR <Direct path on PC
to iadms.exe> (as in 2.b above)
```

```
Desc=<An appropriate message that appears in the status bar when the
user's mouse is over an 856 link in the Windows OPAC>
```

```
Loadtime=20 (only needed if Program=<Direct path on PC to iadms.exe>)
```

## Server Settings

1. To view ImageServer links from WebVoyage, the `voyager.ini` file located in `/m1/voyager/xxxxdb/etc/webvoyage` must contain the following information:

[Links]

ScanDoc=`http://<your.host.name.here:optionalport>/cgi-bin/scandoc.cgi`

**Note:** It must be a fully-qualified URL (not just `scandoc.cgi`). If you are running an SSL webserver, replace `http` with `https`.

[Communications]

FileServer=`<proper IP address or host name of the file server machine>`

FilePort=`<XX70>`

## Scanning Hardware and Software

ImageServer supports 2 types of scanner hardware/software:

- The KOFAX scanner card and compatible scanner, which is primarily used for high-speed scanning and duplex scanning. It is very fast but semi-expensive, and only supports images that are 1 bit per pixel (black and white).
- Any “twain” compatible software/hardware (e.g., scanners, digital cameras, etc.) Normally, most scanners and digital cameras come with image acquisition software so that the device can import images into your PC. This software is usually twain compliant. ImageServer will support all twain software by interfacing with the software when the scan button is clicked, at which point the software will communicate directly to the attached hardware.

It is likely that you will want the twain as opposed to KOFAX solution. Currently, when using the twain scanning option (set by entering `TWAIN_JPEG` as the scanner type in the `SymScan.ini` file), ImageServer scans one page per button click. However, **Image Server has been enhanced to allow batch scanning (continuous or multi-file) image acquisition with one click of the button.** For example, if a color scanner has an Automatic Document Feeder (ADF) in which you can stick 20 or so documents and then click scan once, all 20 documents will be placed into the Image Server unfiled document window.

**Note:** Regardless of the hardware/software you use, for consistent and clear scanning of OCR text, scanners must be set at 300dpi or greater.



# Chapter 1: System Maintenance

This section of the manual is divided into two parts:

Part I describes how to setup ImageServer Maintenance, and includes the following:

- Defining Application Requirements
- Adding New Applications
- Assigning Application Storage Areas
- System Security
- Cataloged Collections

Part II describes the staff use of ImageServer, and includes the following:

- Accessing Administrative Functions
- Maintain Folders
- Audit Reporting

## Part I. ImageServer Maintenance

### Defining Application Requirements

ImageServer comes with one defined application, “Cataloged Collections.” New applications may be added at any time.

**Note:** A default application can be set by selecting **Options>Default Application** from the menu in ImageServer (as opposed to ImageServer Maintenance), and clicking on the application name to be set as the default. The selection is stored in the database and is associated with the user’s login. Then, when multiple applications are specified, the default application associated with the login is in effect until it is changed via the same menu option.

Use the following procedures in defining a new application:

Determine a name for the application that has meaning to users. It is recommended that the application name has a maximum of 25 characters, since it must appear in drop-down lists throughout the system.

1. Determine the fields that will describe each folder in the application.
2. Assign a location on the server where the images are to be stored.
3. Determine which user groups will have access to the application. Each of those steps is discussed in detail below.

## Accessing Application Maintenance

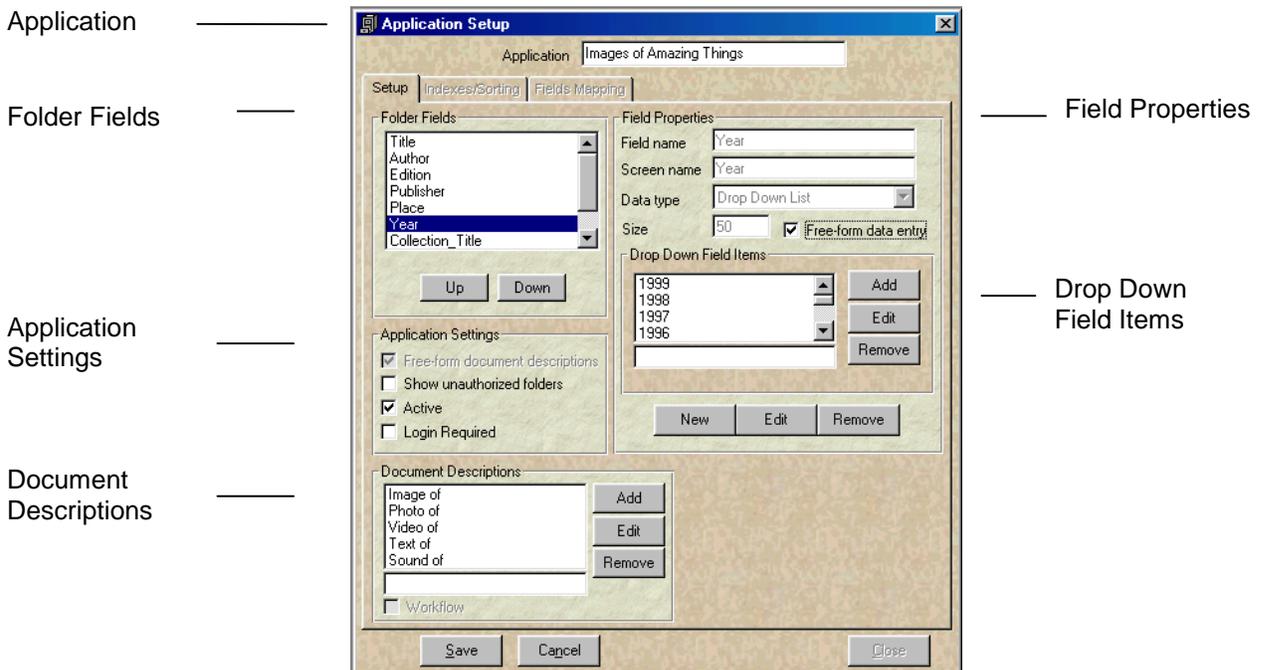
New applications are added through the Maintenance program.

**To access the Maintenance program:**

1. From your desktop, double click on the ImageMaint icon. Enter your Username and Password and press [**Enter**] or click on **OK**.
2. Select **Application Setup** from the Maintenance Menu.



The Application Setup screen will open to the **Setup tab** as the default.



**Application** This is the name that will appear to staff users when they want to work with the image files that are stored under a new application. It should be unique so that it will not be confusing when staff users see the application names from the drop-down list. It is recommended that the application name have a maximum of 25 characters. Punctuation is not allowed—spaces are allowed.

**Folder Fields** Each field is a type of information that is used to describe an electronic folder.

**Field Properties** Each folder field needs a format defined including:

Field name – The name used in the database. E.g., Title.

Screen name – The label used for the Field Name in ImageServer. It is an editable field. It may or may not be the same as the field name.

Data type – Defines whether users will enter free-form text, a date, or select from a drop-down list when using ImageServer.

Size – Maximum number of characters that users are allowed to enter as free-form text for the field name when using ImageServer.

## Drop-Down Field Items

If you select drop-down list as the data type, this is where you enter the options that will be available to users when they select folder data from a drop-down list in ImageServer.

In the example, Language is the only field that has a drop-down list. All other field properties in the example are text and one is date (for the year field).

## Application Settings

Allows you to set various options relating to the application including:

Free-form document descriptions – Specifies whether Document descriptions may be manually entered or selected from a list in ImageServer.

Show unauthorized folders – Allows users without access rights to see that a folder exists (but still prevents them from viewing the contents of the folder) in ImageServer.

Active – Defines whether the images stored in the application will be accessible to viewing by patrons in WebVoyage.

Login Required – Defines whether the patron must log in to WebVoyage before being allowed to view images stored in this application.

## Document Descriptions

(Optional) This is the wording of the hyperlink to the digital file archived in the ImageServer database. Document Descriptions provide a consistent, organized method of filing various images. Limiting the Document Descriptions to an authorized list maintains consistency from one folder to another and ensures reliable retrieval in the future. For example, you can set the authorized list to begin with image of, photo of, text of, sound clip of, video of, or any digital object you will use with ImageServer.

If this field is left blank, a staff user will be able to enter a description in ImageServer.

**Note:** Throughout ImageServer the term *document* is used interchangeably with *image*. Both of the terms represent any form of digital object, such as photo, text, sound clip, and video.

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## Adding New Applications

1. From the Application Setup screen, click on the **New** button. The cursor will be automatically placed in the Application Name box at the top of the Setup tab.
2. Enter the name you want to give the new Application.

3. Click on the **New** button in the Field Properties area. The cursor will automatically move to the Field name box under Field Properties.

As you type the field name, the system automatically enters the same name for the Screen name that users will see in ImageServer. The Screen name field is editable if you want to rename it.

**Note:** Since blank spaces are not permitted, underscored lines will appear each time you use the Space Bar. Press [**Tab**] or [**Enter**] to move the cursor to the next box.

**Note:** You can also use this field to circumvent naming restrictions dictated by Oracle. For example, “date” is an Oracle data type; because of this, Oracle prevents you from using “date” as a field name. However, you may set the field name to be “A\_Date” or “The\_Date” and enter “Date” as the screen name. Since the screen name appears in Image Server and not the field name, the user will see “Date” and not “The\_Date.”

4. For Data type, select Text or Drop Down List. Press [**Tab**] or [**Enter**] after your selection is made. Descriptions of the data types are listed below. It is recommended that staff using Voyager limit use of data types to text and drop-down list.

<i><b>Data Type</b></i>	<i><b>Description</b></i>
Text	Free-form text in alpha or numeric. Recommended for names and dates. Data entered is left-anchored index.
Drop Down List	In ImageServer, Voyager users will select an entry from a drop-down list created on this tab. Recommended if you want to limit your users to a specific set of data types. <b>Note:</b> This list is already present in the database for the default Cataloged Collections application.

In the **Size** box, enter the length of the data field. Following are some examples:

- 75 for Title
- 50 for author name
- 75 for publisher
- 4 for date

5. Free-Form Data Entry Check Box is active only if you selected Drop Down List for the data type. Select the Free-form data entry option if you want the ImageServer users to have both options — to select from the drop-down list or manually enter data in a field.

6. If you selected Drop Down List for the data type, you must enter the choices users will have when using ImageServer. For example, if the field name were language you would enter the languages that you want to appear in the list.



- a. Click the **Add** button in the Drop Down Field Items block to begin adding field names.
- b. Enter the name of the field in the entry field below the Drop Down Field Items list.
- c. Click the **Save** button in the Drop Down Field Items block to add it to the list.

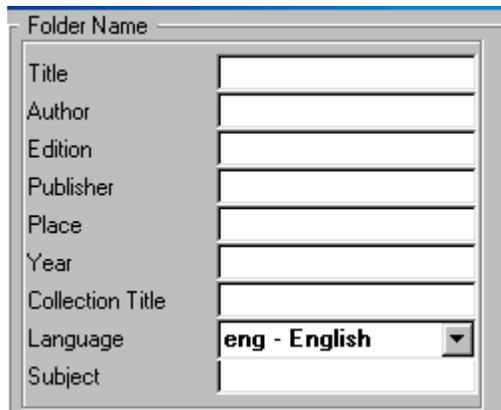
You can also edit a field item by highlighting it in the list and then clicking the **Edit** button. When the field item appears in the entry field below the list, change the item and click the **Save** button.

You can remove a field name by highlighting it and clicking the **Remove** button.

7. Click on **Save** (the one that appears in the Field Properties frame) to save the field properties. The Field name will be listed under Folder Fields on the left side of the Application Setup screen.
8. To add additional folder fields, click on the **New** button and repeat Steps 2 through 8.
9. If a field is entered out of sequence, select it from Folder Fields list and click on **Up** or **Down** button to change the display order.

Following is an example of a finished set of Folder Fields and what their “screen names” would look like in ImageServer.

Screen Names \_\_\_\_\_



10. In the Document Descriptions area add a list of items that will limit the Document Descriptions to an authorized list.
  - a. Click the **Add** button in the Document Descriptions block to begin adding the document name.
  - b. Enter the name of the document in the entry field below the Document Descriptions list.
  - c. Click the **Save** button in the Document Descriptions block to add it to the list.

You can also edit a document name by highlighting it in the list and then clicking the **Edit** button. When the document name appears in the entry field below the list, change the name and click the **Save** button.

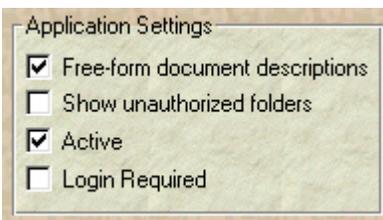
You can remove a document name by highlighting it and clicking the **Remove** button.

**Note:** The workflow checkbox is **not** used with Voyager.



## Application Settings

The following four options are available under the **Application Settings** area on the Application Setup screen:



- Free-form document descriptions - This allows a user to manually enter a Document description by typing the name in the box rather than being required to select one from the drop-down list when adding documents to folders in ImageServer.
- Show unauthorized folders - This gives a user who does not have access to unauthorized folders the ability to see that the folder exists In ImageServer. When this option is selected, the folder data will appear in the Folder Searches and be available for display to anyone in ImageServer. However, the user will not be able to open the folder to see the contents or to delete the folder unless they are an authorized user.  
**Note:** This checkbox pertains only to controlling access to the application in ImageServer. This does not affect access to the application in WebVoyage.

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- Active – This specifies whether the images in this application will be available for users to view in WebVoyage. When this checkbox is turned off, the contents of this application will not display in WebVoyage.  
**Note:** This checkbox pertains only to controlling access to the application in WebVoyage. This does not affect access to the application in ImageServer.

New  
for 2000

- Login Required – This specifies whether a user must be logged into WebVoyage before they can view the images in this application. If this is turned on, the user must have a valid WebVoyage login to view these images. A “valid” login is **any** WebVoyage login. This means that anyone who has a current WebVoyage login will be able to view **all** of the images stored in applications that have the **Active** checkbox turned on.  
**Note:** This checkbox pertains only to controlling access to the application in WebVoyage. This does not affect access to the application in ImageServer.

### Controlling Access to Images Displayed in WebVoyage

The Active and Login Required checkboxes determine how the images in an application can be accessed when searching the database in WebVoyage.

- If you do not want the images in the application to be available to patrons searching WebVoyage, turn **off** the Active checkbox (no check). When the Active checkbox is turned off, the Login Required checkbox is irrelevant.

- If you want to make the images in the application available to anyone searching in WebVoyage, turn **on** the Active checkbox (a check) but turn **off** the Login Required checkbox.
- If you want to make the images available in WebVoyage to anyone with a valid login, turn **on** both the Active and Login Required checkboxes.

After the application, folder fields, document descriptions and application settings have been established, click on the **Save** button at the bottom of the page. A confirmation message will appear to remind you of the next step: to assign group authorizations at the **Security** screen and to assign a storage area for images at the **Document Storage** screen.

**Note:** Clicking the **Save** button will cause the new application to disappear from the Application drop-down list. **This is not a bug.** The new application still exists but will **not** appear in the Application Setup dialog until you have assigned authorizations on the **Security** screen.

Click the **Close** button to close the Application Setup screen. Before you can finish setting up the application, you must add the new application to the list of authorized applications in the **System Security Setup** screen.

## System Security Setup Screen

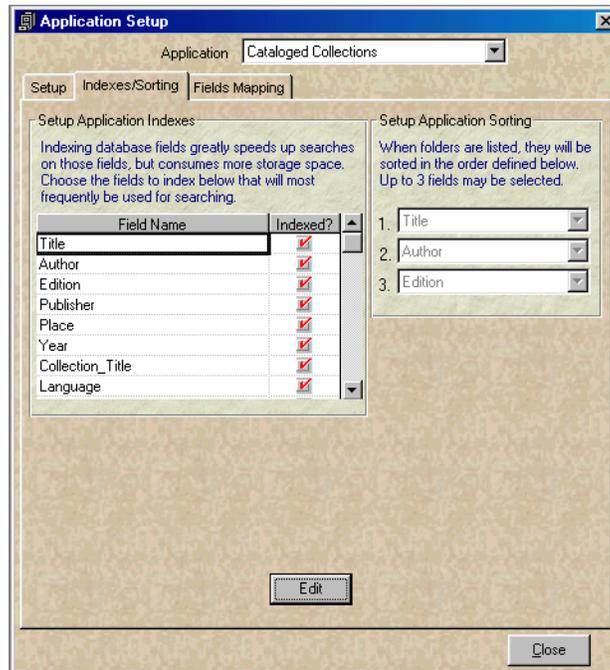
The System Security Setup screen specifies what types of access are to be made available to operators within either ImageServer or ImageServer Maintenance. This description is only intended to allow you to make a new application accessible so that it can be further defined. System Security is discussed in full on page 27.

To make a new application accessible:

1. From the Maintenance menu, click the **System Security** button. This opens the System Security Setup screen
2. On the System Security Setup screen, click the **Authorize** tab.
3. Highlight the **Group Name** of the group of which your current login is a member and click the **Edit** button. This allows that group to be edited.
4. Highlight the name of the new application where it appears in the **All System Applications** list and click the **Add** button. This will allow members of that group access to the new application.  
**Note:** Make sure that the group to which you add your application is authorized to use System Maintenance (i.e., by having the **Can use System Maintenance** checkbox turned on).
5. Click the **Save** button. This saves the edits made to the group authorizations.
6. Click the **Close** button to close the System Security Setup screen.

## Indexes/Sorting Tab

After each application has been set up and authorized, click the **Application Setup** button again. The new application should now appear in the Application drop-down list. Select the new application in the Application list and click on the Indexes/Sorting tab. Click on the **Edit** button to activate the screen.



When the screen is active, the Edit button is replaced by the Save and Close buttons.

- Setup Application Indexes - For each application, it is suggested that you select the primary fields that will be used most frequently when retrieving folders. Make your selections by clicking the box to the right of the Field Name. A red check mark will be placed after your selection has been made.
- Setup Application Sorting - For each application, you can select up to three fields that will determine the order the folders will be listed when a search is done. Make your selection from the items in the drop-down list. Click on **Save** button to save your settings and then **Close** to exit the Application Setup screen.

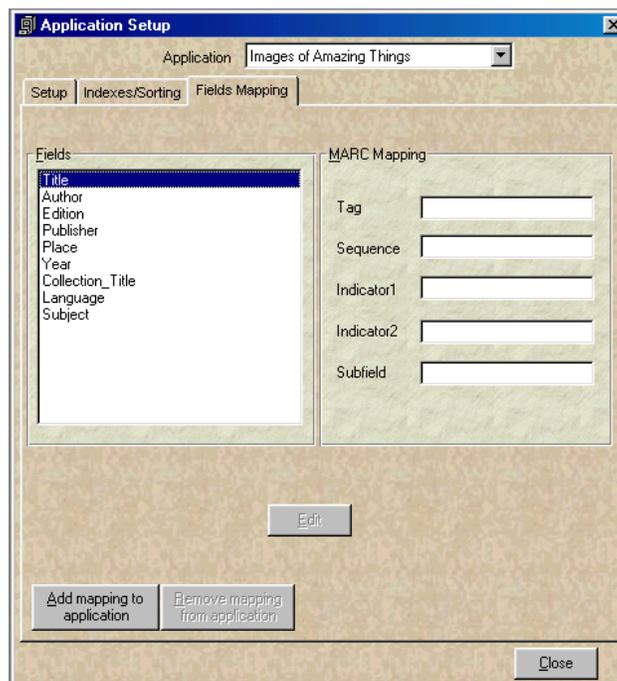
## Fields Mapping Tab

After each application has been set up, go to the Fields Mapping tab. Click on the **Edit** button to activate the screen.

The Fields Mapping tab is where you will assign the MARC values to the fields in an application. Use this option to define individual tags, indicators, and subfields. The values will transfer to the MARC bibliographic record when sending the information from the Image Server client to the Voyager Cataloging client.

### To assign the MARC Mappings:

1. Select the Application from the drop-down list. Click on **Add mapping to application** button. The cursor will be placed in the Tag field under the MARC Mapping area.
2. Enter the MARC Mapping data for each index field as it will appear in the folder name.
3. Click on **Save** after all the data has been entered.



4. Click on **Edit** to make changes to the MARC Mappings.
5. **Remove mapping from application** will clear all mapping for the selected application, making communication with Voyager impossible until new mapping is assigned.

## MARC Mapping Sequence

The Sequence field in MARC Mapping offers some versatility for sending tags to Voyager Cataloging. The variations are described below.

**Group subfields into a single tag** – Offers the flexibility of arranging more than one subfield in a single tag. Note tag 260 and its subfield assignments below.

**Sort tags** – Offers control over the order that tags can be sent to a new bibliographic record in Voyager Cataloging. Note tags 245 and 100. If you want Author to come before Title, assign Author sequence 1 and Title sequence 2. The order of appearance in the bibliographic record in Voyager Cataloging is based on the assigned sequence numbers.

**Note:** The order of appearance of the fields in the folders in the ImageServer client is not affected by the sequence numbering.

The MARC Mapping fields may be edited at any time. When editing these fields, you must click the **Save** button after changing each field. If you do not click the Save button before you highlight another field, the changes made to the previous field will not be preserved. Clicking Save after editing each field will prevent your edits from being lost.

Field Name	Tag	Sequence	Indicator 1	Indicator 2	Subfield
Title	245	2	0	0	‡a
Author	100	1	1		‡a
Edition	250	3			‡a
Publisher	260	4			‡b
Place	260	4			‡a
Year	260	4			‡c
Collection_Title	440	5		0	‡a
Language	008	6			‡36
Subject	650	7		4	‡a

# Assigning Application Storage Areas

Each application must have adequate storage space on the server. ImageServer automatically stores the files in subdirectories that correspond to the date that the images were added to the ImageServer database. For example, files are stored in /m1/voyager/isxxxdb/images/ by reverse date, i.e., 991029, the date the file is added. The **Document Storage** function in ImageServer Maintenance program controls the storage areas for new images.

The next step of the setup process for a new application is the configuration of the directories where all the files will be stored. In ImageServer, image files will be stored on a server. Assigning a storage location to a new application or changing the active area for an existing application is done from the **Document Storage** screen that can be accessed from the Maintenance Menu.



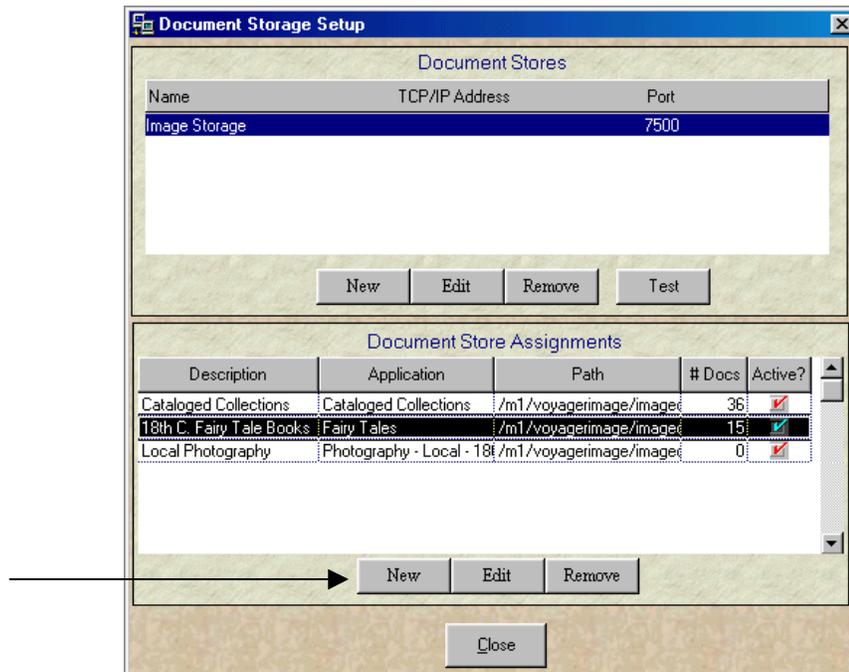
The **Document Storage** function allows the system administrator to select the machine and directories that will be used for each application.

The Document Store specifies the IP address of the machine where the images are stored. The port is the one that corresponds to your ImageServer server (iasock) and your ImageServer database.

**Note:** During ImageServer installation, a default document store entry is added to your ImageServer database. You **must** edit the IP, port and directory added so that the information matches your institution's current ImageServer setup.

**To assign a storage location:**

1. Specify the new storage directory on the file server by clicking on the **Document Storage** button at the Maintenance Main menu.



2. To assign a new application storage, click on **New** button on the lower portion of the **Document Store Assignments**.
3. Enter a description in the **Description** field.
4. Enter an application in the **Application** field.
5. Enter the correct storage path in the **Path** field. For new installations, the path **must** be modified to match your directory structure.
6. The **# Docs** is system-generated each time a new image is stored.
7. Click the **Active?** box.
8. With the exceptions of authorizing staff users and defining MARC mapping, the new application is now ready to have images filed into its electronic folders.

**Note:** Only one path is allowed for each application. Once a path has been associated with an application, all images stored in that application are stored in that path. Because of this, we do **not** recommend that you change the path.

## Maintaining Applications

Once your applications have been established, modifications can be made to the current settings by using the **Edit** function at the bottom of the Application Setup screen.

### ***Changes you can make include:***

Edit Application Name  
Add Folder Field  
Add, Edit, Remove Document Name

### ***Changes you cannot make***

Modify or Remove Existing Folder  
Fields

### **To change a document description:**

1. At the Application Setup screen, click on the **Edit** button. This will activate the Document Descriptions functions.
2. Select the name of the image that you want to change from the list of Document Descriptions and click on the **Edit** button.
3. The cursor will be automatically placed in the textbox that is just below the Document Descriptions list. Enter the new image name and click on **Save** button. The new image name will be added to the Document Descriptions list.

### **To delete a document description:**

1. Select the name of the image you want to delete from the Document Descriptions list.
2. Click on the **Remove** button. **Note:** Once you click on the **Remove** button the image name is deleted. There is no confirmation message or cancel option. If the image name was deleted in error, you can add it back to the list by using the **Add** function.

## Deleting Applications

Applications can be deleted when they are no longer needed or when they have been setup incorrectly.

**WARNING:** A high level of caution must be used when deleting an application since it will permanently remove and destroy an entire set of electronic folders. Due to the severity of this delete function, the staff user is prompted twice to confirm the action.

### To delete an application:

1. At the Application Setup screen, select the Application you want to delete from the drop-down list at the top.
2. Click on **Remove** button. The **Delete Application** confirmation box will appear with a **Warning** message.

**WARNING:** Please read the warning message since deleting the application will permanently remove it from ImageServer. All data associated with the application will also be permanently deleted.

3. To delete the application, click on **Yes**. (**No** is the default.) A second Delete Application confirmation box will appear.

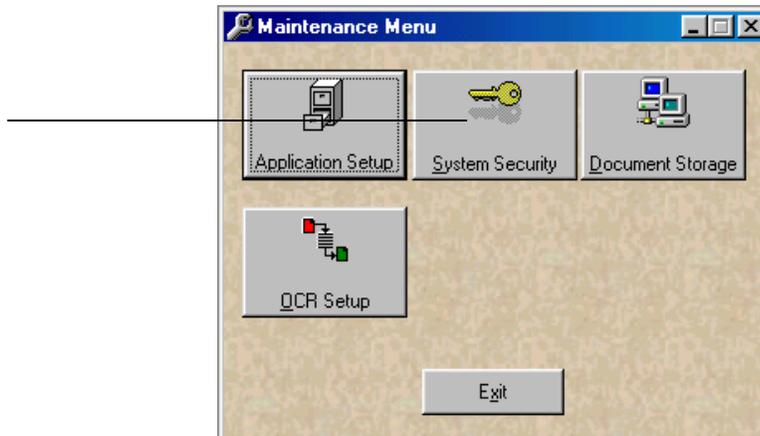
**WARNING:** Please read the message in the confirmation box since deleting the application will permanently remove it from ImageServer. All data associated with the application will also be permanently deleted.

4. To delete the application, click on **Yes**. (**No** is the default.) The application is permanently deleted.

**Note:** The image files stored in their assigned storage area are not deleted, but all information required to access them has been deleted — links to accessing them have been severed. If any of the images were added to bibliographic records in Voyager (by adding 856 links to the images), those links are now invalid and should themselves be removed using the Cataloging module.

# System Security Setup

To access the System Security Setup screen, select **Security** from the Maintenance menu.

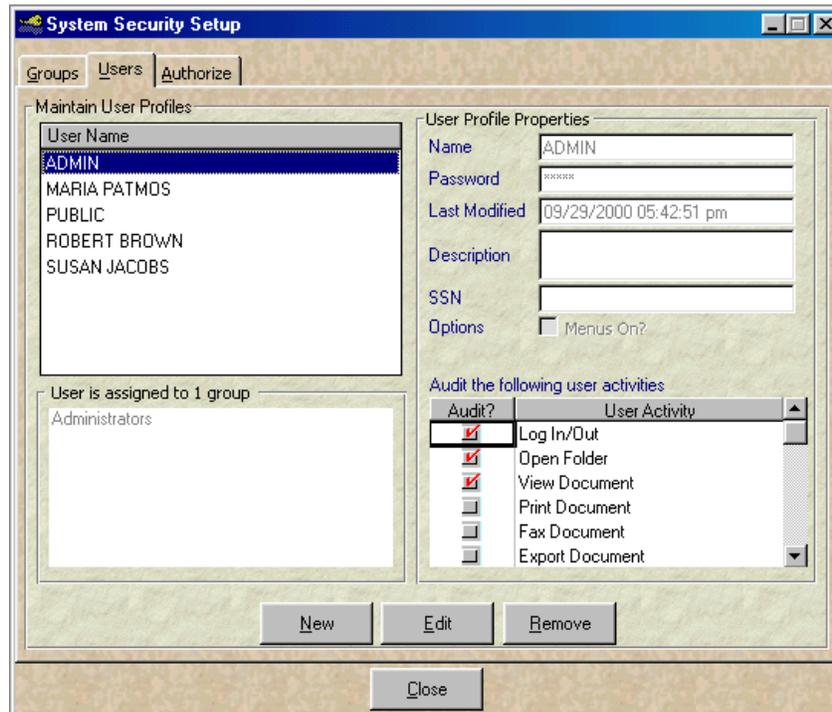


There are three steps to establishing users and security at the System Security Setup screen:

1. Defining Individual Staff Users (Uusers Tab)
2. Creating Staff User Groups (Groups Tab)
3. Assigning Access Authorization to Staff Groups (Authorize Tab). This involves access control for users and folders, and requires you to set access levels in the ImageServer module as well.

## Defining Staff Users

The first step in establishing System security is to define the individual staff users who will have access to the system. This is done at the **Uusers** tab from the System Security Setup screen. From the **Uusers** screen, you will be able to perform the following functions: Add a Staff User, Modify Staff User Information, Delete a Staff User.



### To add a new staff user:

1. From the **Users** screen of System Security Setup, click on **New** button. The cursor is automatically placed in the Name box under User Profile Properties. Enter the staff user's name as it will appear throughout the system. (Maximum number of characters allowed is 20.) Press **[Tab]** or **[Enter]** to go to the next textbox.
2. Enter the staff user's password. (Maximum number of characters allowed is 20.) For security reasons, the password will be represented by a series of asterisks (\*). Press **[Tab]** or **[Enter]** to go to the **Description** textbox. The **Last Modified** field is automatically entered with the current date and time.
3. Enter a description for the staff user. This is generally the staff user's job title or function within an organization. (Maximum number of characters allowed is 100.)
4. The **Menus On** option in ImageServer gives staff users access to the main menus when they log on to ImageServer. The box is checked (turned on) by default.
5. From the **User Activity** list select the functions you want to be able to audit for that user. Click in the audit box to the left of the User Activity to select a function. Use the scroll bar to access all the listed activities.



6. Click on **S**ave button to save the User Profile Properties. The staff user will be added to the User Name list on the left side of the screen.

### To modify staff user profile information:

1. At the **U**users screen, make your selection from the **U**ser **N**ame list on the left side of the screen.
2. Click on the **E**dit button. The User Profile Properties section will become active.
3. Double click on the field you want to modify and enter the new information. Click on **S**ave button to save the changes.

### To delete a staff user:

1. At the **U**users screen, make your selection from the **U**ser **N**ame list on the left side of the screen.
2. Click on the **R**emove button. A confirmation message appears. Click on **Y**es to permanently remove the staff user from the system. (**N**o is the default.)
3. A second confirmation message appears. Click on **Y**es to deactivate the staff user. (**N**o is the default.) If the staff user is currently logged into the system, he/she will be able to continue working. After the staff user exits the system, entry back into the system will be denied.

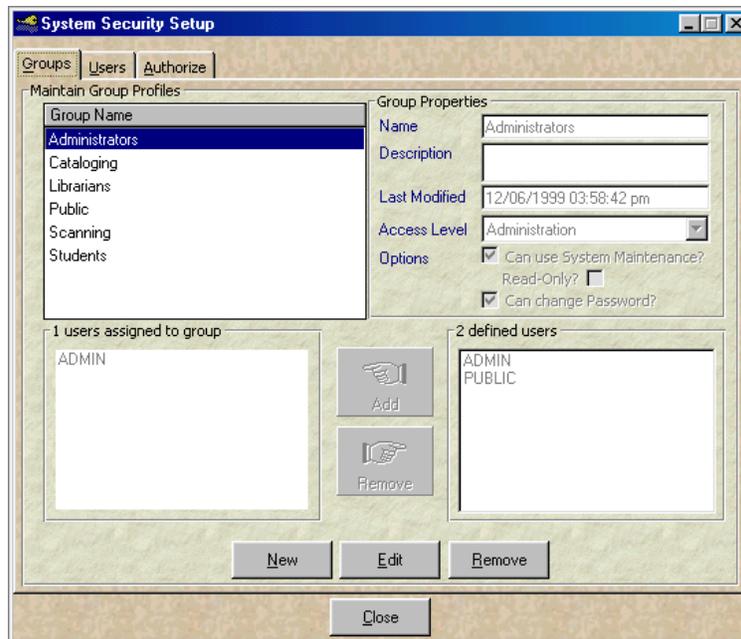
## Creating Staff User Groups

Once staff users have been set up, the next step is to assign them to a Staff User Group at the **G**roups screen. Each staff user group should contain the staff users who require access to the same applications and to the same ImageServer features and functions. Authorization to applications and ImageServer functions is assigned at the group level.

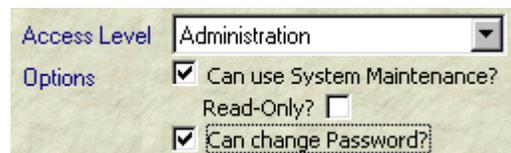
**Note:** Staff users must be assigned to only **one** group. Do not assign users to more than one group.

**To establish a staff user group:**

1. From the **Groups** screen at System Security Setup window, click on the **New** button. The cursor is automatically placed in the Name box under **Group Properties**.



2. Enter the name you want to give the staff user group. Press **[Tab]** or **[Enter]** to go to the next textbox. Enter a description or definition of the staff user group you are establishing, then press **[Tab]** or **[Enter]**.
3. The **Last Modified** box will be automatically filled in with the current date and time. Press **[Tab]** or **[Enter]** to go **Access Level** drop-down list. Select the appropriate Access Level for the staff user group from the drop-down list. The options are described below.



**Note:** At least one group must have the **Read-Only?** Checkbox **unchecked**.

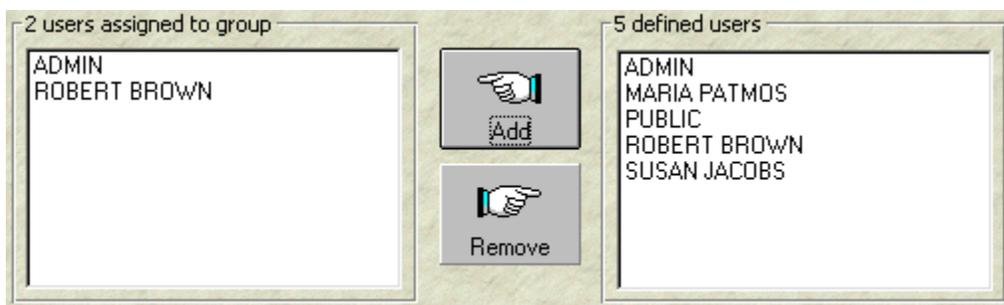
<b>Access Level</b>	<b>Description View in Browser</b>	<b>Used For</b>
Public	Allows Voyager OPAC users to access the image in view only mode by clicking on the hyperlink. Web Voyage views the image using a browser.	Public
View Only	Staff users have ability to retrieve and view images.	Staff
View & File	Staff users have ability to file, index, and retrieve images and folders.	Staff
Administration	Staff users have access to administrative functions.	Staff

**Select the appropriate Options for each staff user group.**

- **Can use System Maintenance** gives the staff users the right to view and modify any of the settings in Maintenance.
- **Read Only** gives staff users the right to only view the settings in Maintenance.
- **Can change Password** allows staff users to change their individual passwords.

**WARNING:** Never allow staff users the option to change their password.

4. After the Group Properties have been entered, the next step is to assign users to the group. Select the staff user from the list on the lower right side of the screen. Holding down the **Ctrl** key and clicking on the staff user names can select multiple staff users. Click on **Add** button to add selected staff users to the group.



5. Click on **Save** button to save the group and staff user setting.

### To delete a staff user group:

1. At the **G**roups screen, select the group name that you want to delete. Click on the **R**emove button.
2. A warning message appears. Click on **Y**es to continue with the deletion. (**N**o is default.)
3. A second confirmation message appears. Click on **Y**es to permanently delete the staff user group. (**N**o is default.)
4. Click on **C**lose to exit the System Security Setup.

## Access Authorization and Control

The third and final step of defining your system staff users and security is to authorize groups to access applications and then to set access levels for groups and folders.

### To authorize staff user groups to applications:

1. From the **A**uthorize tab of ImageMaintenance's System Security Setup function, select the staff user group from the **G**roup Name list. Click on the **E**dit button.
2. From the **All System Applications** list, select the application to which you want the group to be given access. Click on the **A**dd button.
3. Under the Group Permissions section, select the User Activity functions for the User Group. The **Quick Authorize** buttons will expedite making selections. A red check mark will be placed in checkboxes in the **Allow** column next to the User Activity.
4. Click **S**ave to apply your edits, or **C**ancel not to.

## Access Levels for Applications and Groups in ImageMaintenance

Access control in the ImageServer client is available at the folder level; depending on how you set up your documents, it becomes a tool for controlling access at the document level as well.

The implication of folder access levels is that all users in a particular group are assigned access level rights of x (where x = the access level), when dealing with images coming from an application. That means that if you are in a particular group, you will be able to view all the images with an access level of x or less. You will not be able to view those images with an access level x or more.

## To edit folder access levels for groups and applications in ImageMaintenance:

1. From the Authorize tab of ImageMaintenance's System Security function, select a group and an application, and click **Edit**.
2. Set the folder access level (from 1 to 100) by using the up and down arrows to increase and decrease the number. **Note:** The default folder access level setting is 50.
3. Click **Save** to apply your edits, or **Cancel** not to.

**WARNING:** It is recommended that you leave the security level in ImageMaintenance at its default value of 50. To set security higher for certain folders while still keeping the folder access level at 50 in ImageMaintenance, please read the next section.

## Access Levels for Folders in ImageServer

After you assign access levels to applications and groups in ImageMaintenance, you can implement viewing restrictions by manipulating the access level requirements for specific folders in the ImageServer module. ImageServer provides security to confidential and sensitive folders by giving an access authorization level for each folder within an application. Secure folders will require a high access level. To increase the level of security, increase the access number. Since users cannot view a folder with an access level higher than their authority, the access level for users and applications (set in ImageMaintenance) must be set to at least the same level as the folder.

Essentially, access levels in both ImageMaintenance and ImageServer work like tokens. If you have 50 tokens in ImageMaintenance but need 75 tokens to view a document in ImageServer, you will not be able to view the document. However, if you have 50 tokens in ImageMaintenance and only need 45 tokens to view a document in ImageServer, you will be able to view the image.

**Therefore, ImageMaintenance folder access levels= how much access you have as a user to view folders; ImageServer folder access levels= how much access you need as a user to view folders.**

**Note:** The rules that manage the viewing capabilities of folders apply only to viewing of images inside the ImageServer client. This has no effect on viewing images in WebVoyage.

**Restricted Collections Only:** For access to restricted images, it might be helpful to set up a separate application with a higher folder access level (e.g., 75) in ImageServer. That way restricted images are grouped together, you know where they are, and you understand there is only limited access through the ImageServer application. This restriction has no effect on viewing images in WebVoyage. Viewing instructions for WebVoyage are discussed in the section Application Settings.

### To edit folder access levels in ImageServer:

1. Select a folder. You can do so from any screen that allows you to get a folder (the most commonly used screen is the one where you create a folder and its images to send to Cataloging).
2. Once the folder is retrieved, click **Edit>Folder Access Level** on the main menu. The **Edit Folder Access Level** dialog box appears.
3. Lower or increase the access level for that folder (from 1 to 100) by using the up and down arrows. **Note:** The default folder access level setting is 50.
4. Click **OK** to apply your edits, or **Cancel** not to.

**RECOMMENDATION:** It is our recommendation that you leave the folder access level to the default of 50 in ImageMaintenance, and modify the folder access level in ImageServer. This way you can avoid potential confusion caused by setting values in both modules.

### Quick Authorize

Quick Authorize buttons can be used to add standard functionality to group authorizations.

The four Quick Authorize buttons and their related functions are:

<b><i>Button</i></b>	<b><i>Function</i></b>
<b>View</b>	Open Folders View Images Print Images Fax Images Export Images Send Folders/Images
<b>Edit</b>	Annotate Images Edit Folder Notes Edit Image Notes
<b>File</b>	File Images Unfile Images Delete Images Add Folders Edit Folder Data Edit Folder Access Levels Remove Unfiled Images Add/Import Images OCR Prepare Maintain Folder Information
<b>Administration</b>	Delete Folders



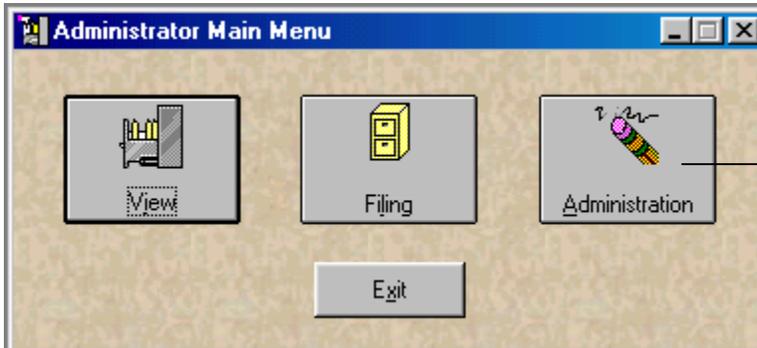
# Part II. ImageServer

Part II includes the following system administrative sections:

- Maintain Folders
- Find Folders
- Audit Reporting

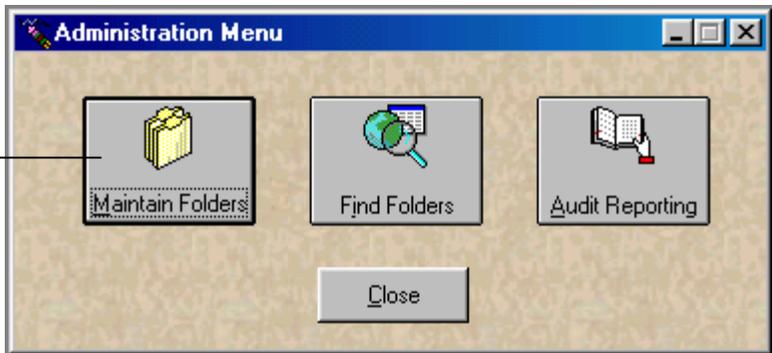
## Accessing Administrative Functions

1. From your Windows desktop, double-click on the **ImageServer** icon. Enter your Username and press [ENTER] or [TAB]. Enter your Password and press [ENTER] or click on **OK**. The main ImageServer window opens. If you have the *Menu On* option selected on the Users tab in the Security Set up in ImageServer Maintenance, the Administrator Main Menu will appear. Click on the **Administrator** button to access the Administrative functions.



The following options are available from the Administration Menu:

- Maintain Folders
- Find Folders
- Audit Reporting

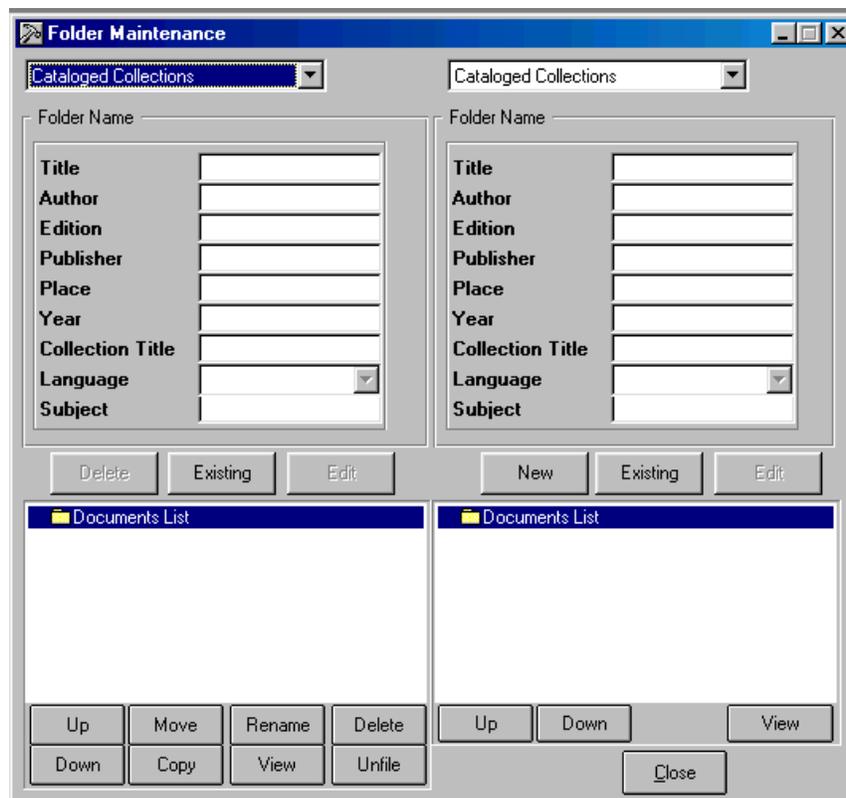


Maintain Folders and Find Folders are also available from the **F**older menu at the main window. Audit Reporting is also available from the **T**ools menu at the main window.

# Maintain Folders

The folder maintenance function allows you to modify indexing and filing information for folders or images. The maintenance feature can be used in a variety of ways:

- Editing of folder indexes, such as make a name change or correct errors
- Deleting folders and images
- Moving pages within a multi-page image
- Copying and moving images to other folders



## To access Folder Maintenance:

Search for the folder that you want to modify. Click on **F**older menu at the main screen and select **M**aintain **F**olders. If you are using the Administration Menu, select **M**aintain **F**olders button.

At the Folder Maintenance screen, the index data and folder contents are shown on the left side.

### To edit folder index data:

1. From the Folder Maintenance screen, click on the **Edit** button. The data in the first index field becomes highlighted. Type in the new data or press **[Tab]** or **[Enter]** to go to the field you want to edit. Click on **OK** when all the changes have been made.
2. To make changes on another folder, click on **Existing** button to search for the folder.
3. Select the application from the drop-down list you want to search. Enter your search criteria and click on **OK**.
4. Select the folder you want to modify from the *Folder List* and double click on it. To modify the folder index, click on **Edit**. To delete the folder and its contents, click on **Delete**.
5. Click on **Close** button to exit from the Folder Maintenance screen.

### To delete a folder:

1. Search for the folder you want to delete.
2. Click on **F**older menu at the main screen and select **M**aintain **F**olders. If you are using the Administration Menu, select **M**aintain **F**olders button.
3. From the Folder Maintenance screen, click on the **Delete** button. The confirmation message will appear. Click on **Y**es to delete the folder.

**NOTE:** The folder and contents of the folder will be *permanently* deleted from ImageServer. Access to the folder and its contents of images will be severed.

4. Click on **Close** to exit the Folder Maintenance screen.

### To view Images:

The contents of the folder appear under the Documents List. Images are listed alphabetically by name. To determine the number of pages of the image, click on the plus symbol (+) located on the left of the image name. The plus symbol will change to a minus symbol (-) when the page details are displayed.

To view an image, select it from the Document List and click on the **View** button.

### To delete an image in a folder:

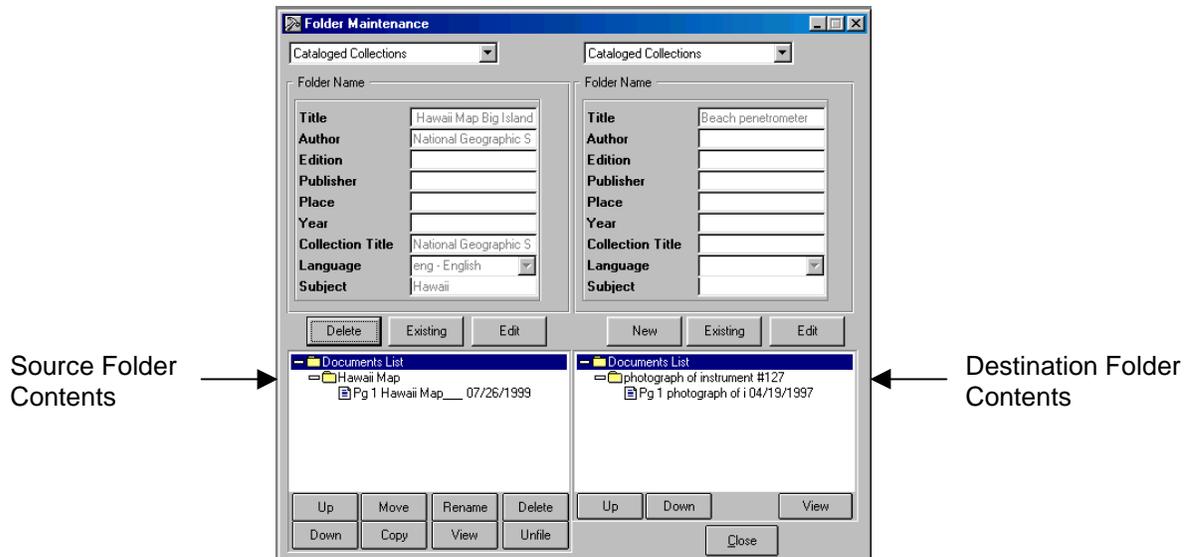
1. Search for the folder that contains the image file or file with multiple images in one 856 tag that you want to delete.
2. Click on **F**older menu at the main ImageServer screen and select **M**aintain **F**olders. If you are using the Administration Menu, select **M**aintain **F**olders button.
3. Select the image file or file of multiple images in one 856 tag from the list from the Folder Maintenance screen, click on the **D**el~~e~~te button. To delete multiple 856 tags, select and delete one tag at a time.
4. The confirmation message will appear. Click on **Y**es to delete the image. **NOTE:** The image will be *permanently* deleted from the system. Click on **C**lose to exit the Folder Maintenance screen.

### To move an image file within one 856 tag of multiple image files:

1. At the Folder Maintenance screen, select the page that you want to move from the Documents List.
2. Click on the **U**p or **D**own button to move the page up or down in the sequence.

### To move an image file to other folders:

1. Select the application you want to search from the drop-down list. Click on **E**xisting button and enter the search criteria to locate the folder that contains the image you want to move using the left side of the Folder Maintenance screen. This will be the *source* folder.
2. On the right side of the Folder Maintenance screen, select the application you want to search from the drop-down list. Click on **E**xisting button and enter the search criteria to locate the folder in which you want the image placed using the left side of the Folder Maintenance screen. This will be the *destination* folder. To create a new folder in which to place the image, lick on **N**ew button and enter the folder name.



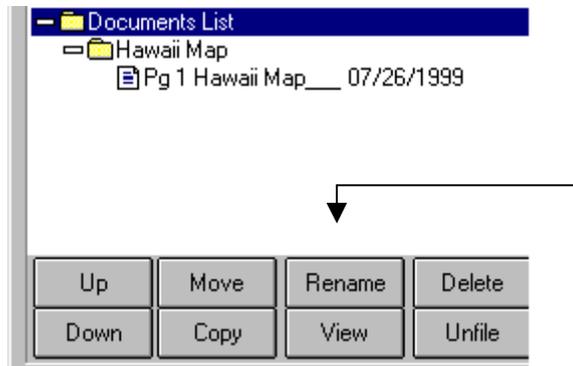
3. From the source folder (on the left side), select the image you want to move. Click on **M**ove button.
4. The *Confirm Move* message will appear. Click on **Y**es. The image will be moved from the source folder to the destination folder.

#### To copy an image file to another folder:

1. Select the application you want to search from the drop-down list. Click on **E**xisting button and enter the search criteria to locate the folder that contains the image you want to copy using the left side of the Folder Maintenance screen. This will be the *source* folder.
2. On the right side of the Folder Maintenance screen, select the application you want to search from the drop-down list. Click on **E**xisting button and enter the search criteria to locate the folder in which you want the image placed using the left side of the Folder Maintenance screen. This will be the *destination* folder. To create a new folder in which to place the image, click on **N**ew button and enter the folder name.
3. From the source folder (on the left side), select the image you want to copy. Click on **C**opy button.
4. The *Confirm Copy* message will appear. Click on **Y**es.
5. You will be asked if you want to also copy the image notes, if they exist. Click **Y**es or **N**o. The image will be copied to the destination folder.

### To change an image filename:

1. From the Folder Maintenance screen, select the application you want to search from the drop-down list.
2. From the Document List, select the image that you want to rename. Click on the **Rename** button.



3. Select a new name from the drop-down list. If authorized, you may also enter a free-form name for the image. Click on **OK** or press **[Enter]**.

# Find Folders - Advanced Folder Searches - Use for Quality Control

In addition to searching for folders by their indexing information, ImageServer allows you to search for folders by their contents or missing images. In certain situations, this powerful image search can be used to quickly locate folders by image name instead of index information. This advance level search is available using the **Find Folders** option from the **Folder** menu.

The Find Folders function allows you to search a user-defined subset of folders within an application that is based on specific search criteria. For example, you could search the ImageServer for images viewed more than four times.

## To use the Find Folder function:

1. Select the **Find Folders** options from the **Folder** menu. You may also click on the **Search Folders Document** button on the toolbar.



2. Select the application from the top of the Folder/Document Search screen.
3. In the Folder Selection area, select the appropriate Folder Field and Search Type from the drop-down lists.
4. Under *Condition 1*, enter your search criteria. If searching for a *Range*, enter the second search criteria under *Condition 2*. Continue to enter additional search information in the additional grid boxes, if necessary.
5. In the Document Selection area, select the appropriate Document Field and Search Type from the drop-down lists. Under *Condition 1*, enter your search criteria. If searching for a *Range*, enter the second search criteria under *Condition 2*.
6. Select **Show Folders** to search the entire folder or **Show Documents** to find a specific document.

Folder / Document Search

Select Application: Cataloged Collections

Open Query: [ ]

Enter Folder Search

Folder Field	Search Type	Condition 1	Condition 2

Enter Document Search

Document Field	Search Type	Condition 1	Condition 2
Doc Date	Range	01/01/1992	12/31/1995

Show Folders
  Show Documents

Save Query    Save Query As    Delete    Clear

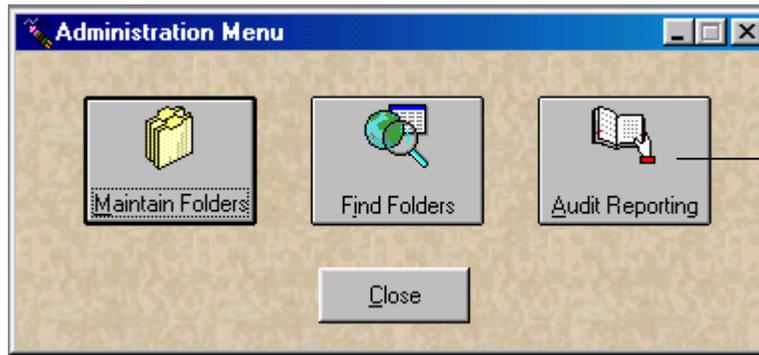
OK    Close

7. Click on **Save Query** or **Save Query As** to save the search criteria for use in the future. All saved items can be accessed from the **Open Query** drop-down list.
8. Click **OK** to run the search or **Clear** to start over. If you selected *Display Folders*, you will see a Browse List of folders that meet your search criteria. *Display Document* will return a Documents List of all images that meet your search criteria.

# Audit Reporting

ImageServer keeps track of a variety of statistics about the system. The following information is tracked for each folder and image:

- Time Last Accessed
- Number of Times Viewed
- Number of Times Printed



Audit Reporting - 52 records displayed

Select Application: Cataloged Collections

Select Audit Record Values:

Action: View Document | Date From: 10/01/1999 | Date To: 12/01/1999 | User: <All>

Search | Close

Application	Action	Date/Time	Username	Folder Index 1	Folder Index 2
Cataloged Collections	View Document	10/01/1999 12:39:45 PM	DEMO	Hawaii Wate	
Cataloged Collections	View Document	10/07/1999 10:06:44 AM	DEMO	cow	Wuest, Ruth
Cataloged Collections	View Document	10/12/1999 05:54:39 PM	ADMIN		
Cataloged Collections	View Document	10/12/1999 06:13:54 PM	ADMIN		
Cataloged Collections	View Document	10/12/1999 06:14:08 PM	ADMIN		
Cataloged Collections	View Document	10/12/1999 06:14:21 PM	ADMIN		
Cataloged Collections	View Document	10/14/1999 02:13:35 PM	PUBLIC	Faroe Islands	
Cataloged Collections	View Document	10/14/1999 02:19:52 PM	DEMO	Blair Witch P	Stern, D. A.
Cataloged Collections	View Document	10/14/1999 02:22:49 PM	DEMO	Faroe Islands	
Cataloged Collections	View Document	10/17/1999 05:41:18 PM	PUBLIC	Godfather	Puzo
Cataloged Collections	View Document	10/19/1999 12:16:24 AM	ADMIN	auckland	
Cataloged Collections	View Document	10/19/1999 08:36:20 AM	ADMIN		
Cataloged Collections	View Document	10/21/1999 02:15:39 PM	ADMIN	auckland	
Cataloged Collections	View Document	10/21/1999 02:16:54 PM	ADMIN	baseball	
Cataloged Collections	View Document	10/21/1999 02:17:00 PM	ADMIN	baseball	
Cataloged Collections	View Document	10/21/1999 02:17:07 PM	ADMIN	big houses	Hominid, Jay

# Chapter 2: Voyager Interface

ImageServer interfaces to the Voyager Integrated Library System in the following two areas:

- Cataloging
- Viewing Images

Images that are managed by ImageServer can be automatically catalogued into either an existing bibliographic or holdings record, or into a new bibliographic or holdings record in the Voyager Cataloging module. Images that are cataloged in this manner in the Voyager Cataloging module may then be viewed from Voyager running either ImageServer or your browser.

## ImageServer Integration with Cataloging

Before a new application can be used with Voyager, the following steps must be completed. All steps are discussed in ImageServer Maintenance.

1. Define the application.
2. Set security for the application.
3. Assign document storage for the application.
4. Define MARC mapping

All integration with the Voyager Cataloging Module must be done from the ImageServer **File Documents** screen. The integration adds the necessary ImageServer related information such as application number, folder number, and image number to the MARC record, 856 tag. You can select which of the two sets of data are sent to Cataloging.

The data sets are:

- 856 tag information for selected images or all images from a folder.
- bibliographic information as well as the 856 tag information for selected images or all images from a folder.

# Keyboard Shortcuts

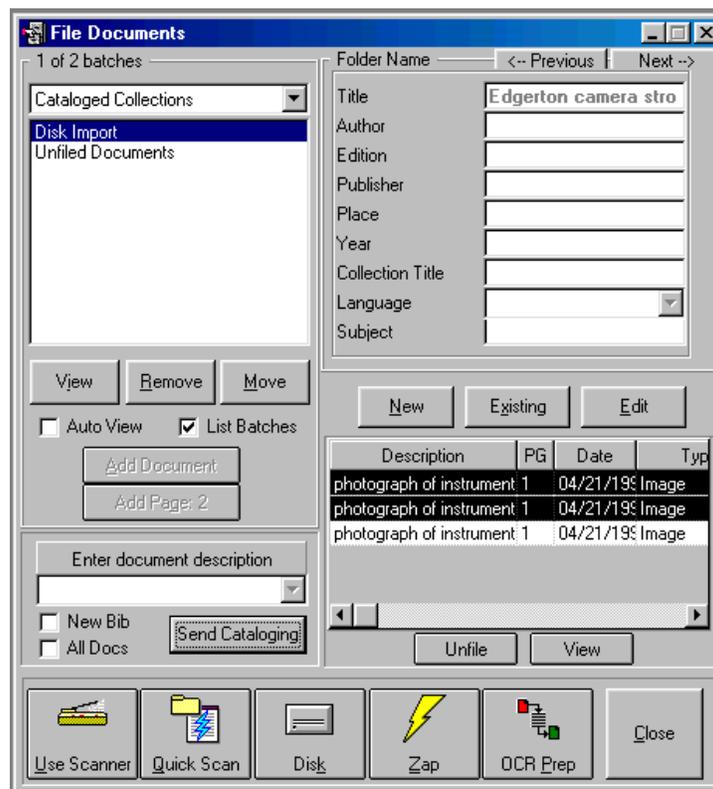
The 856 interface to the Cataloging module is designed to work with the following function keys.

<b>Key</b>	<b>Description</b>
F8	Creates an 856 tag(s) in an open bibliographic record in Cataloging for selected document(s).
F9	Creates 856 tags in an open bibliographic record in Cataloging for all documents.
Alt-F8	Creates new bibliographic record in Cataloging for the values in Folder Name and creates 856 tag(s) for selected document(s).
Alt-F9	Creates a new bibliographic record in Cataloging for the values in Folder Name and creates 856 tags for all the documents in the folder.

## How to send selected document(s) to an existing bibliographic record:

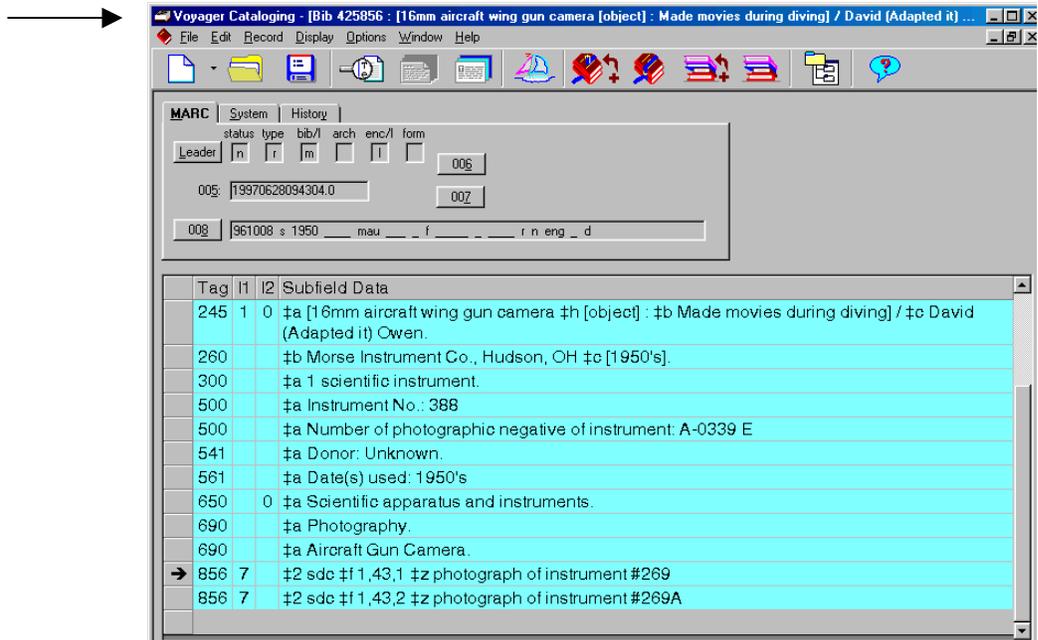
1. Click on **Existing** button then enter the criteria to locate the appropriate folder.
2. Select the document(s) from the Document List that you want to add to an existing bibliographic record in Cataloging. One 856 tag will be added to the bibliographic record for each selected document(s). Click on **Send Cataloging** button or Press **F8**.

**Note:** The document(s) must be filed into a folder and the document(s) must be highlighted in the Document List.



Two 856 tags are added to the open bibliographic record in Cataloging, because only two were selected.

**Note:** In the same way, 856 tags can also be added to existing holdings records.

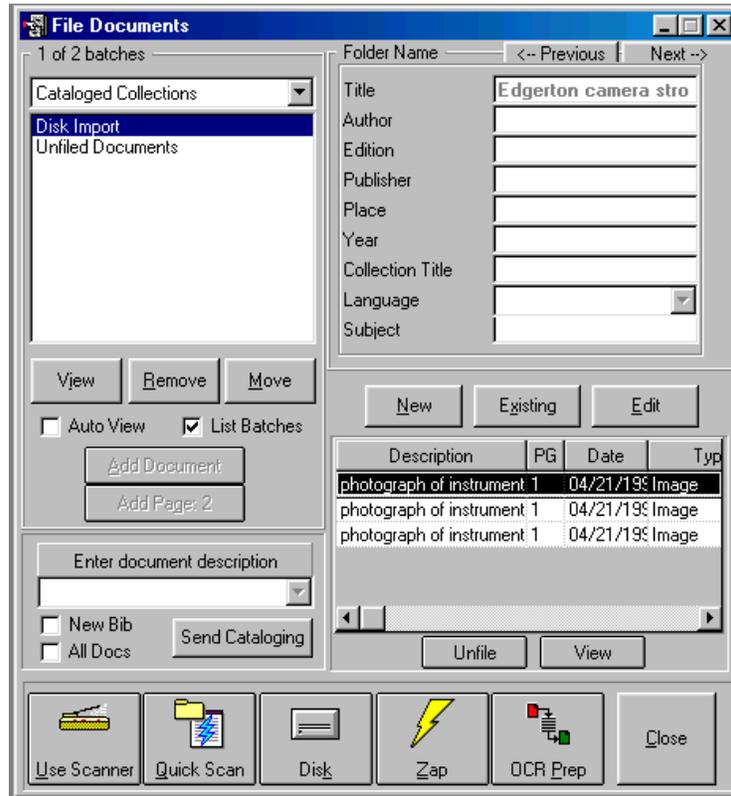


Following is a description of the subfield data for the 856 tag.

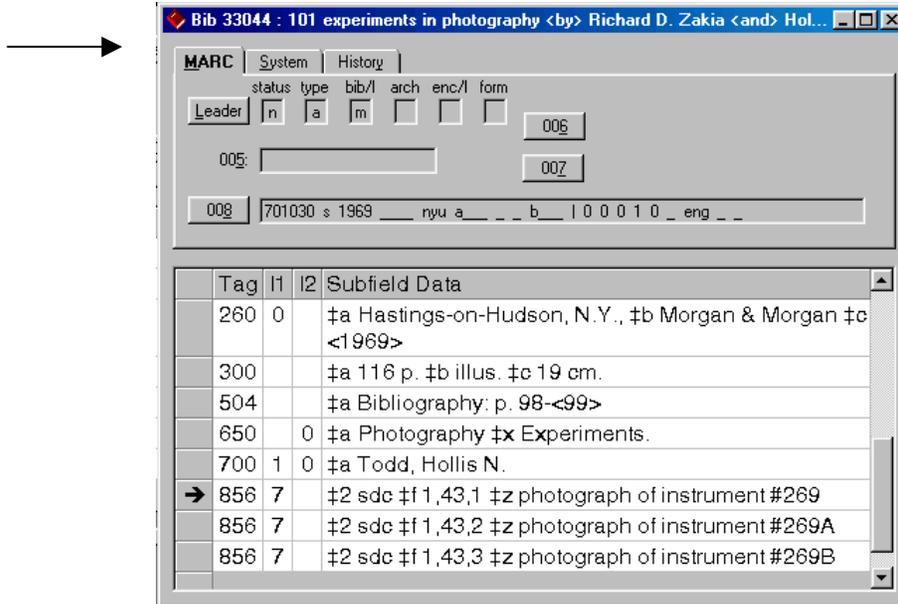
<b>Indicator</b>	<b>Description</b>
856	Tag
7	First indicator
_	Second indicator is a space
\$2	Fixed value
Sdc	Fixed value
\$f	Fixed value
1	Application
449	Folder
1	Image
\$z	Value in document from document description

## How to send all documents to open bibliographic record:

To send all the documents in the active folder to Cataloging, check the **All Docs** box then click on **Send Cataloging**. You can also press **F9**.

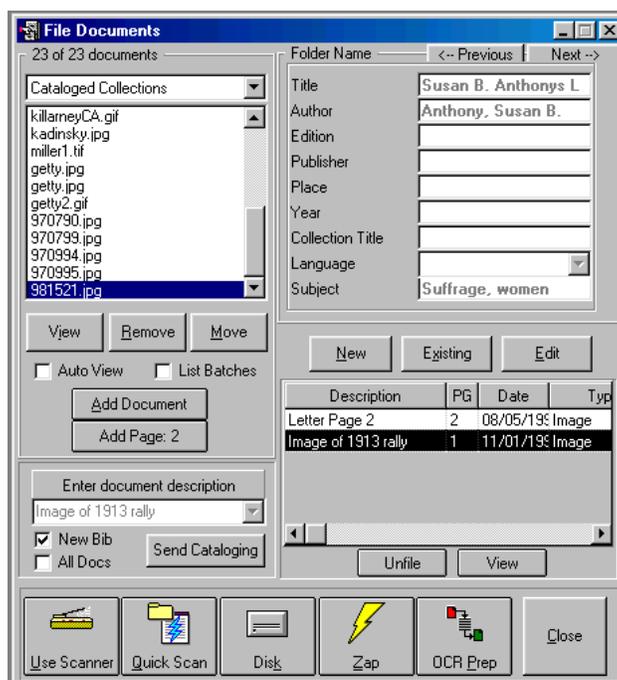


All 856 tags are added to the open bibliographic record in Cataloging.



### How to create a new bibliographic record for selected document(s):

1. Click the **New Bib** box and click on **Send Cataloging** button to create a new bibliographic record for a selected document(s) in a folder. You can also press **Alt-F8**.

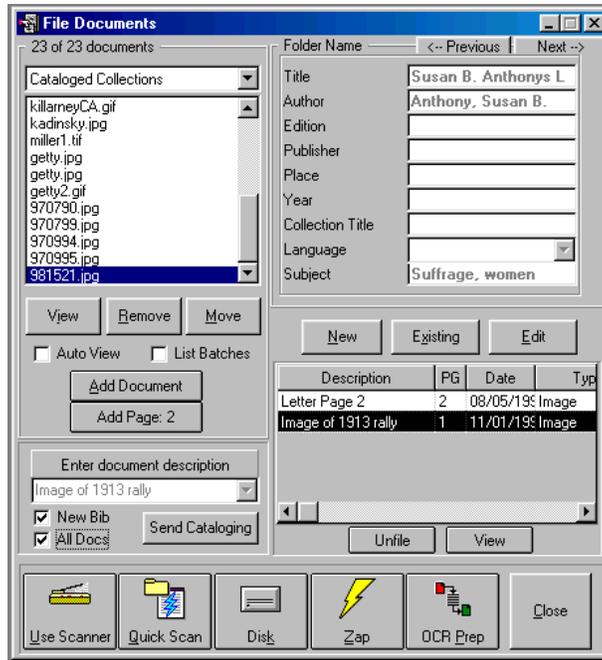


One 856 tag is added to a new bibliographic record in Cataloging, because only one was selected.

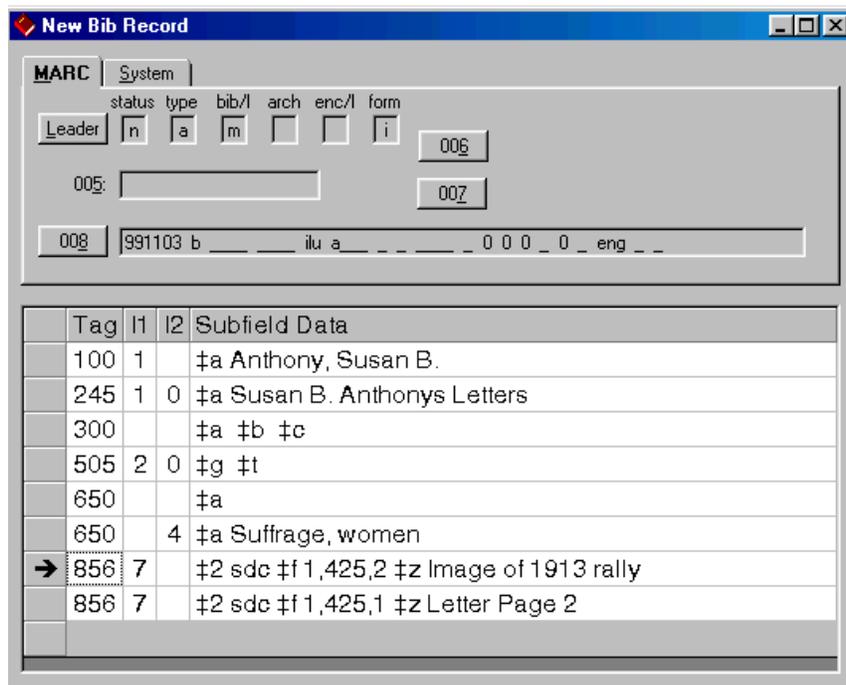
Tag	I1	I2	Subfield Data
100	1		⌘a Anthony, Susan B.
245	1	0	⌘a Susan B. Anthony's Letters
610	2	0	⌘a
650			⌘a
650		0	⌘a
650		4	⌘a Suffrage, women
→ 856	7		⌘2 sdc ⌘f 1,425,2 ⌘z Image of 1913 rally

### How to send all documents to a new bibliographic record:

To send all the documents in the active folder to a new bibliographic record in Cataloging, check the **New Bib** and **All Docs** boxes then click on **Send Cataloging** button. You can also press **Alt-F9**.



All 856 tags are added to a new bibliographic record in Cataloging:



# Chapter 3: Full-Text OCR

OCR (Optical Character Recognition) is the process of converting a scanned document into machine-readable text. By transferring this text into a bibliographic record in Cataloging, the text can then be searched in Voyager. In ImageServer, you will be able to select a specific area or full page of a document to go through the OCR process.

**Note:** For consistent and clear scanning of OCR text, scanners must be set to 300dpi or greater. See the “Scanning Hardware and Software” section of the “ImageServer Check List” (on page 9) for more information about scanning.

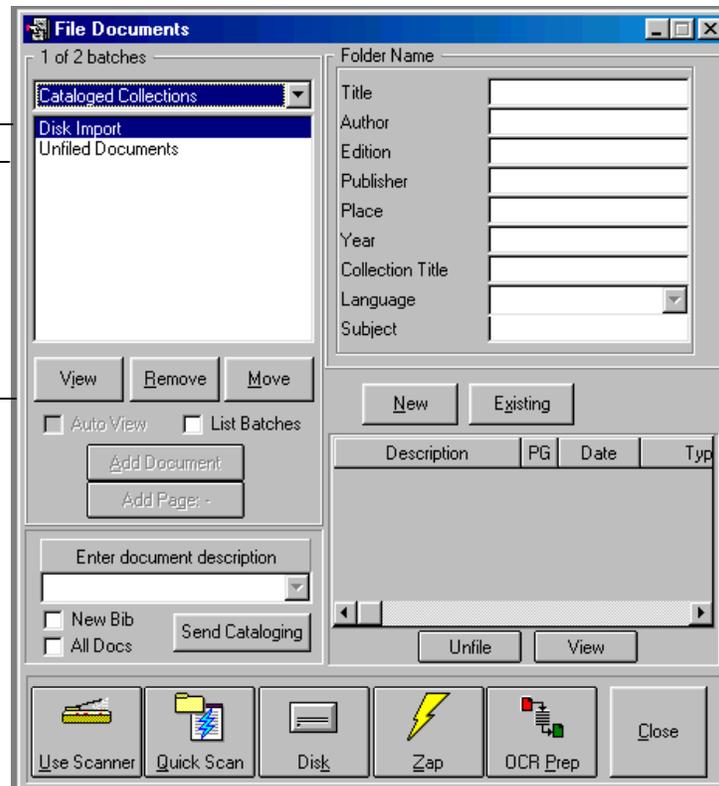
## To start the OCR process:

1. Open Voyager Cataloging and a bibliographic record. Specify the **Tag**, **Indicator 1**, **Indicator 2** and **Subfield** where OCR data should be inserted into an active bibliographic record. If you do not specify this information, the following defaults will be used: Tag: 500, Indicator 1: none, Indicator 2: none, Subfield: a. To change these values in Cataloging, select Options>Preferences>Mapping.
2. Minimize the Voyager Cataloging window.
3. Open ImageServer.

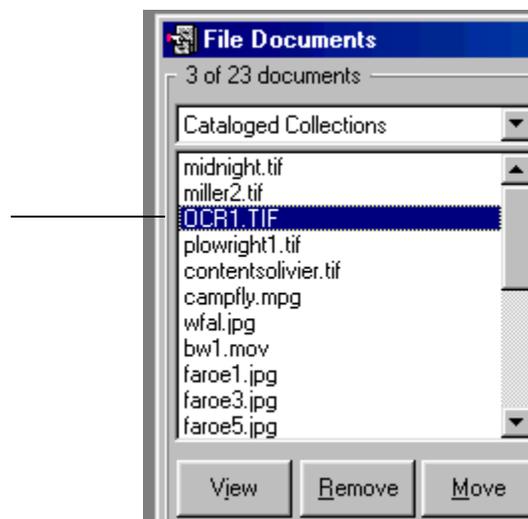


4. On the ImageServer toolbar click on the **File Documents** button.

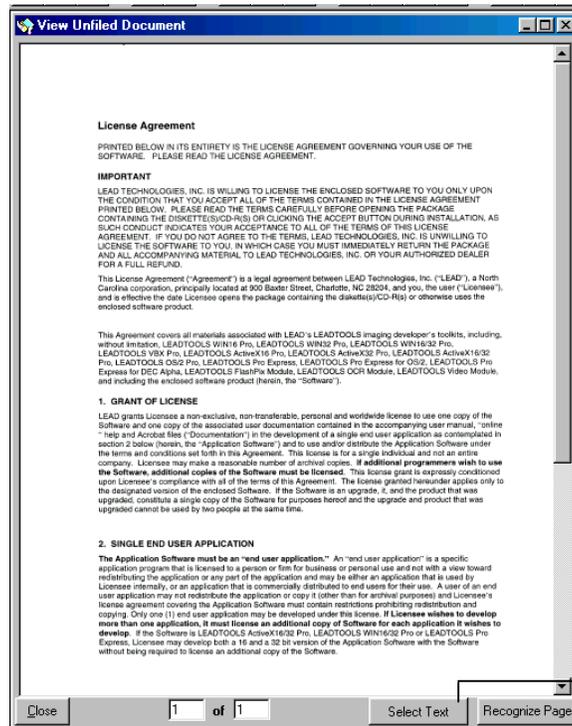
Application



5. Select the appropriate application from the Applications drop-down list on the left if it is not already selected.
6. Select the image from a folder, a list of unfiled documents, or the directory from your disk drive.



7. Double-click on the image to view it or click the **View** button. The image will appear on the left side of the screen.

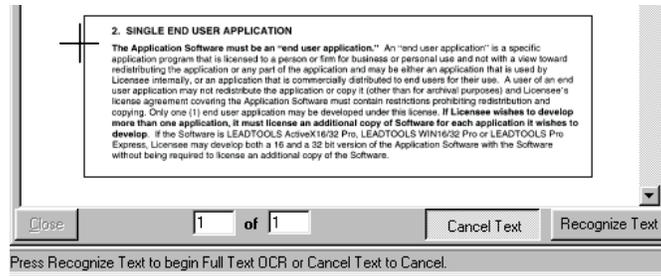


Select Text

8. Click anywhere on the document to activate the window.
9. On the toolbar use the **Zoom In** button to enlarge the view on screen, if necessary. Each click will increase the view. You can also select the View menu and Zoom.



10. You can select a portion of the text or the entire page for OCR. To select the entire page, click on **Recognize Page**. To select an area on the page, click on the **Select Text** button. The mouse indicator becomes a selection tool (black cross). Depress the mouse button and drag over the area on the image that you want. This will create a rectangle around the selection.
11. Click on **Recognize Text** button to start the OCR process.

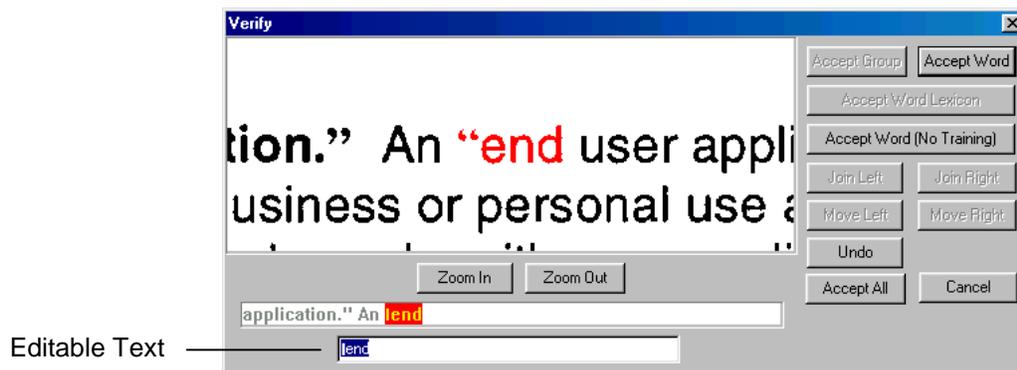


## Text Verification

Certain documents may have characteristics that can cause reduced character recognition accuracy. Examples are:

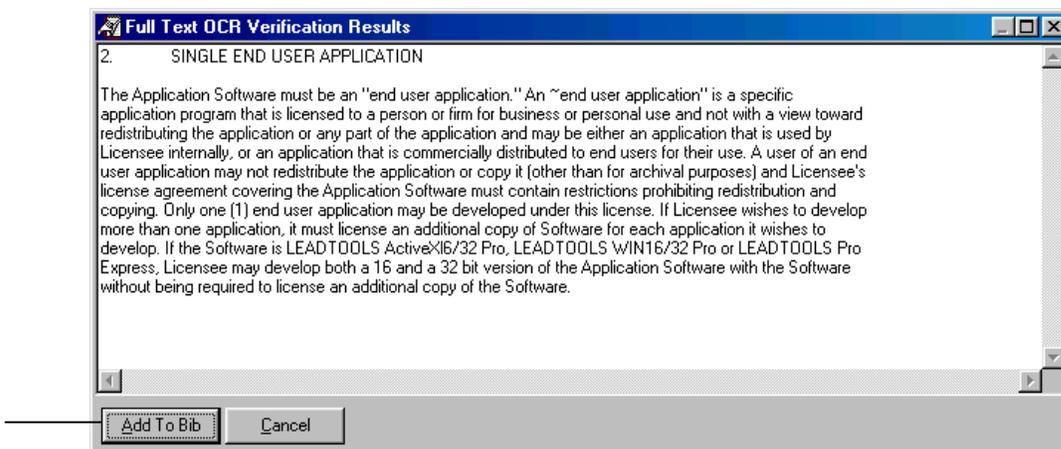
- Documents that are too dark or too light
- Documents with thin or ornate font styles
- Multiple-generation photocopies
- Documents with symbols, such as \$, %, & \*, @, " !
- Low resolution images, such as faxes

In this case, a Verify box will show you which text is not recognizable. The large white area of the box will show the word in question in red. In the text box, you will see how ImageServer interpreted the characters. You may accept ImageServer's interpretation of the word, or edit and then accept it by clicking on **Accept Word**. You can adjust the verifier threshold in the Sysmtrix.ini file, [Full Text OCR] stanza. Valid values are from 0 to 999. The verifier threshold Lower numbers are more forgiving. Higher numbers will check for errors more closely.



<b>Button</b>	<b>Description</b>
Accept Word	Accepts all occurrences of the word.
Accept Word ( No Training)	Accepts the word, but asks for verification if it is encountered again.
Undo	Undo last step only (either before or after pressing Accept Word).
Accept All	Accepts all text in the OCR area as is and opens Full Text OCR Verification Results.
Cancel	Closes Verify box and returns to the text area.

When the OCR process is complete, the Full Text OCR Verification Results box opens. You may review the text in its entirety before sending it to an active bibliographic record in Voyager Cataloging.



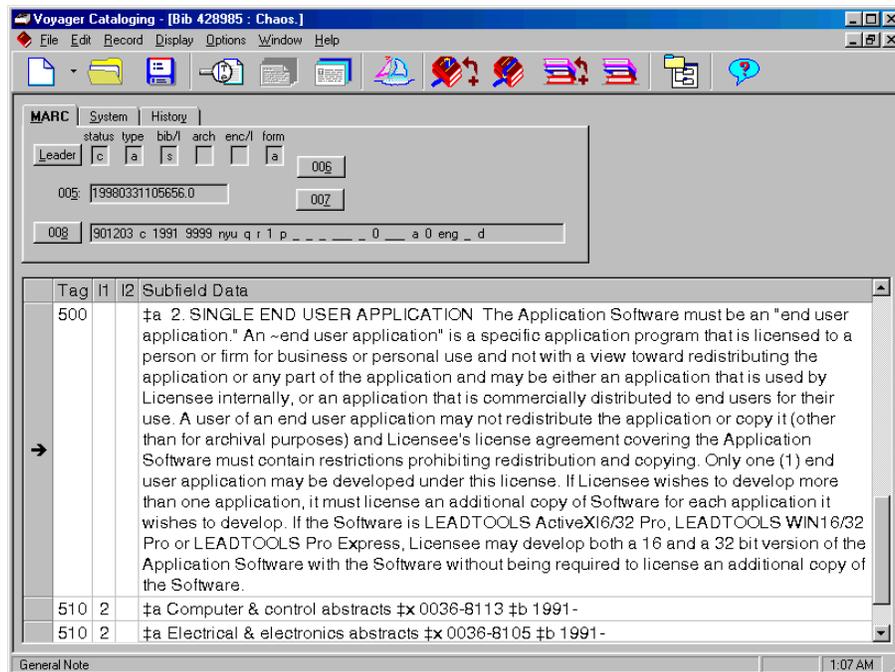
12. Check on **Add To Bib** to add to Voyager Cataloging.

### **MARC Mapping for OCR text**

This feature is used specifically in conjunction with ImageServer. It applies to the sending of Full-Text OCR data (text read from a non-searchable image stored in ImageServer) from the ImageServer program to an active bibliographic record in Cataloging. Once the OCR data is inserted into an active bibliographic record, it can be used in keyword searches in Voyager Cataloging.

If you have not already done so, specify the MARC tag information: **Tag, Indicator 1, Indicator 2** and **Subfield** where OCR data should be inserted into an active

bibliographic record. The default MARC tag for storing the OCR text is Tag: 500, Indicator 1: none, Indicator 2: none, Subfield: a. To change these values in Voyager Cataloging, select the Options menu, Preferences, and the Mapping tab.



**Note:** A maximum of 1200 characters will fit into a single field of a MARC record. Each time a field reaches this limit, another identical field will be created into which the rest of the data will be inserted. In addition, it should be noted that the maximum record size for a MARC record in Voyager is 64K.

# Index

The following typographical convention is used throughout this index: **Arial Narrow** typeface denotes the name of a specific button, option, screen, or tab.

## A

- Access authorization and control
  - assigning, 32-34
- Accessing
  - administrative functions, 37-38
  - application maintenance, 12-14
- Adding
  - new applications, 14-17
  - new staff users, 28-29
- Administration, system
  - See System maintenance and administration
- Administrative functions
  - See *also* System maintenance and administration
  - accessing, 37-38
- Applications
  - accessing maintenance, 12-14
  - adding new, 14-17
  - assigning storage areas, 23-26
  - authorizing staff user groups to, 32
  - defining requirements, 11-22
  - deleting, 25-26
  - maintaining, 25
  - names for, 12
  - settings screen, 18
- Assigning
  - access authorization, 32-34
  - application storage areas, 23-26
  - MARC mapping in Cataloged Collections, 21-22
  - storage default locations, 24
- Audit reporting, 46
- Authorization
  - assigning access, 32-34

## B

- Bibliographic records
  - creating, 52-53
  - sending documents to, 49-50, 51-52, 53-54

- Buttons, Quick Authorize, 34-35

## C

- Cataloging module
  - integration with ImageServer, 47
- Changing
  - document descriptions, 25
  - folder access levels, 34
  - image filenames, 43
- Checklists, post-installation, 8-9
- Client setup, 6-7
- Control, access, 32-34
- Copying image files
  - See *also* Image files and filenames to other folders, 42
- Creating
  - bibliographic records, 52-53
  - staff user groups, 29-32

## D

- Data, index
  - editing in folders, 40
- Default locations, storage
  - assigning, 24
- Defining
  - application requirements, 11-22
  - staff users, 27-29
- Deleting
  - applications, 25-26
  - document descriptions, 25
  - folders, 40
  - images in folders, 41
  - staff user groups, 32
  - staff user profiles, 29
- Document descriptions
  - See *also* Documents changing and deleting, 25
- Documents
  - See *also* Document descriptions

- creating new bib records for, 52-53
  - sending to bib records, 49-50, 51-52, 53-54
- Drop-down field items, 14
  - See *also* Fields
- E**
- Editing
  - folder access levels, 33
  - folder index data, 40
  - 856 tags
    - moving image files within, 41
- F**
- Fields
  - drop-down items, 14
  - and linking folders, 19-20
  - properties, 13
- Files and filenames, image
  - See Image files and filenames
- Files, symtrix.ini, 5
- Find Folders function, 44-45
- Folder Maintenance screen, 39
- Folders
  - changing access levels, 33-34
  - copying image files to, 42
  - deleting, 40
  - deleting images in, 41
  - fields, 13
  - maintaining, 39-43
  - moving image files to, 41-42
- Full-text OCR, 55-60
- Functions, administrative
  - accessing, 37-38
- G**
- Groups, staff user
  - See Staff users and user groups
- H**
- Hardware, scanning, 9
- I**
- Image files and filenames
  - copying and changing, 42-43
  - deleting and moving, 41-42
  - viewing, 40
- ImageServer initialization, 5-10
  - client setup, 6-7
  - post-installation checklist, 8-9
  - symtrix.ini file, 5
- ImageServer, using, 37-60
  - accessing administrative functions, 37-38
  - audit reporting, 46
  - Find Folders option, 44-45
  - and full-text OCR, 55-60
  - interaction with Voyager, 47
  - maintaining folders, 39-43
- ImageServer Maintenance, 11-36
  - assigning access authorization, 32-34
  - assigning application storage areas, 23-26
  - defining application requirements, 11-22
  - system security setup, 27-36
- Index data
  - editing in folders, 40
- Indexes/Sorting tab, 20
- .ini files, symtrix, 5
- Items, field
  - See *also* Fields
  - drop-down, 14
- K**
- Keyboard shortcuts
  - in Cataloging module, 48
- L**
- Levels, folder access, 32-34
  - See *also* Folders
- Locations, default storage
  - assigning, 24
- M**
- Maintaining
  - applications, 25
  - folders, 39-43
- Maintenance, system
  - See System maintenance and administration
- Mapping, MARC
  - See MARC mapping

MARC mapping  
  See *also* MARC tags  
  for OCR text, 59-60  
  and Sequence option, 22  
MARC tags  
  See *also* MARC mapping  
  sort, 22  
Modifying staff user profiles, 29  
  See *also* Staff users and user groups  
Module, cataloging  
  See Cataloging module  
Moving image files, 41-42  
  See *also* Image files and filenames

## N

Names, application, 12  
  See *also* Applications  
New applications  
  See *also* Applications  
  adding, 14-17

## O

Optical Character Recognition (OCR),  
  full-text, 55-60  
Options  
  Find Folders, 44-45  
  Sequence, 22

## P

Post-installation checklists, 8-9  
Properties, field, 13  
  See *also* Fields

## Q

Quick Authorize buttons, 34-35  
Quality control  
  and Find Folders function, 44-45

## R

Records, bibliographic  
  See Bibliographic records  
Reporting, audit, 46  
Requirements, application  
  See *also* Applications  
  defining, 11-22

## S

Scanning hardware and software, 9  
Searching WebVoyage  
  access levels and, 33  
Security setup, system, 27-36  
Sending documents  
  to existing bib records, 49-50  
  to new bib records, 53-54  
  to open bib records, 51-52  
Sequence option  
  in MARC mapping, 22  
Settings screens  
  for applications, 18  
Setup  
  client, 6-7  
  system security, 27-36  
Shortcuts, keyboard  
  in Cataloging module, 48  
Software, scanner, 9  
Sort tags  
  MARC record, 22  
Staff users  
  defining, 27-29  
  deleting, 29  
Staff user groups  
  authorizing to applications, 32  
  creating, 29-32  
  deleting, 32  
Starting the OCR process, 55-59  
Storage  
  assigning application areas, 23-26  
  assigning default locations, 24  
Symtrix.ini file, 5  
System maintenance and administration  
  accessing administrative functions,  
    37-38  
  assigning access authorization, 32-34  
  assigning application storage areas,  
    23-26  
  audit reporting, 46  
  defining application requirements, 11-  
    22  
  and Find Folders option, 44-45  
  maintaining folders, 39-43  
  system security setup, 27-36  
System security setup, 27-36

## T

Tabs, Indexes/Sorting, 20

Tags, MARC sort, 22  
    See *a/so* MARC mapping  
Text verification  
    and full-text OCR, 58-59

## **U**

Users and user groups, staff  
    See Staff users and user groups

## **V**

Verification, text  
    and full-text OCR, 58-59

Viewing images, 40  
    See *a/so* Image files and filenames  
Voyager  
    interaction with ImageServer, 47

## **W**

WebVoyage  
    and access levels, 33