Digitization Workflow & Process Documentation

Smithsonian Institution Libraries

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Pre-Scanning Process

Selection:

SIL's scanning process begins with the selection of material to scan. Material is selected for scanning based on three key areas: content identified through BHL's issue tracking system, called Gemini; content identified by the systematic scanning of a biodiversity discipline topic (i.e. Entomology, Ornithology, Botany, etc.); and institutional publications. Once items have been selected for scanning, SIL staff members will retrieve the items from the appropriate library branch.

Gemini:

Gemini is the issue tracking system used by BHL. All user-submitted feedback on the BHL website is entered into Gemini as an individual issue or ticket. These issues range in subject from identification of problems with scanned content, notification of technical issues, reference questions, and identification of content to scan, among other things. Furthermore, BHL staff members can create issues directly in Gemini should they identify problems or issues that need to be addressed. Staff will regularly create issues identifying items that need to be scanned so that they may be assigned and managed within one workflow tool. Staff members work to resolve these feedback and staff-created issues by assigning them to various BHL institutions to address. Categories in Gemini that lead to the selection of content for scanning include the following:

User Requests:

Using a specific form on the BHL website, users have the ability to enter requests for items to be scanned. These user requests are then assigned to institutions that hold the required items, and thus constitute one avenue of content selection.

Permissions:

BHL regularly receives permission to scan in-copyright content. BHL's Collections Coordinator, Bianca Crowley, creates issues in Gemini for each title for which BHL receives permission to scan. Permissions titles are to be prioritized for scanning above all other content-selection types.

Priority Titles:

The BHL Collections Committee created Botany and Zoology priority lists that identify those titles which are of high importance for the Botany and Zoology fields. Those titles which were not already in BHL, or were not complete in BHL, were entered into Gemini as individual issues and assigned to appropriate institutions.

Gap-Fills:

Many of the serial runs in BHL are not complete. Gaps in serial runs may be identified by users through BHL's scanning request form, or they may be identified by staff members. Filling in gaps in existing serial runs constitute a higher scanning priority than scanning new serial runs (with the exception of permissions and priority list titles).

Systematic:

Content may also be selected based on a biodiversity discipline, such as Entomology, Botany, etc. In these instances, an institutional will systematically go through their entire collection regarding a specific topic, scanning everything in that discipline not already scanned by another institution.

Determining whether specific monographs have already been scanned using this method involves inputting the entire branch monographic catalog into the monographic de-duper. To determine whether specific serial volumes have been scanned involves locating in the scanlist each serial title in a specific discipline to determine which titles/volumes have not been scanned by another institution. See more on the monographic de-duper (page 27) and scanlist (page 18) in subsequent sections.

Institutional Publications:

Content published by a BHL partner (i.e. Institutional Publications) also constitutes another area of content selection. In general, institutions are responsible for scanning their own publications, and typically this scanning includes traditionally in-copyright (post-1923) items.

Content Prioritization:

The following shows the content-selection types in order from (typical) highest to lowest priority:

Permissions Titles
Priority Titles
User-Submitted Serial Gap-Fill Requests
User-Submitted Requests for New Content (non Gap-Fills)
Non User-Submitted Gap-Fills
Institutional Publications
Systematic Subject Scanning

**Please note that this prioritization is a suggestion and represents the typical scanning hierarchy. Various circumstances may result in various prioritization hierarchies.*

For any items that are pulled as a result of Gemini issues, be sure to leave a note on the Gemini issue indicating which items have been pulled. If pulling the items resolves the issue, update the issue as closed and complete. For more information on operating Gemini, see the *Gemini How-To*/Appendix A.

Physical Review and Sorting:

Once items have been selected and pulled for scanning, staff must review the physical condition of the item to determine if it can be scanned and where it should be scanned. Staff are particularly looking for items that are too fragile, too tightly bound, still within copyright (and for which we do not have permission to scan), missing content (i.e. missing pages or pieces of pages), have uncut pages, or contain print that is too light.

There are three locations at which items can be scanned: FedScan, TSP, and Pennsy.

FedScan:

FedScan is the mass-digitization Internet Archive scanning operation housed at the Library of Congress. Non-fragile, non-rare items are typically sent to FedScan for scanning.

Scribe:

SIL also has a single Internet Archive scanning machine, staffed by an Internet Archive employee, called a Scribe, which is housed within the Natural History building. Fragile and rare items in particular are scanned in-house on this Scribe.

Pennsy:

Finally, over-sized materials (i.e. folios) are too large to be scanned on Internet Archive machines. Thus, they are scanned via SIL's "boutique" scanning process, located at SI's Pennsy location. Over-sized materials are sent here for scanning.

With the above parameters in mind, staff will perform a physical review of all items pulled to determine if they can be scanned and where they should be scanned, sorting items into piles/sections according to the scanning location. Any items that cannot be scanned for one reason or another should be put aside in a "reject" pile. Any items for which staff are uncertain whether they can be scanned, or where they should be scanned at, are put aside for Preservation Review by one of SIL's Book Conservators.

Preservation Review:

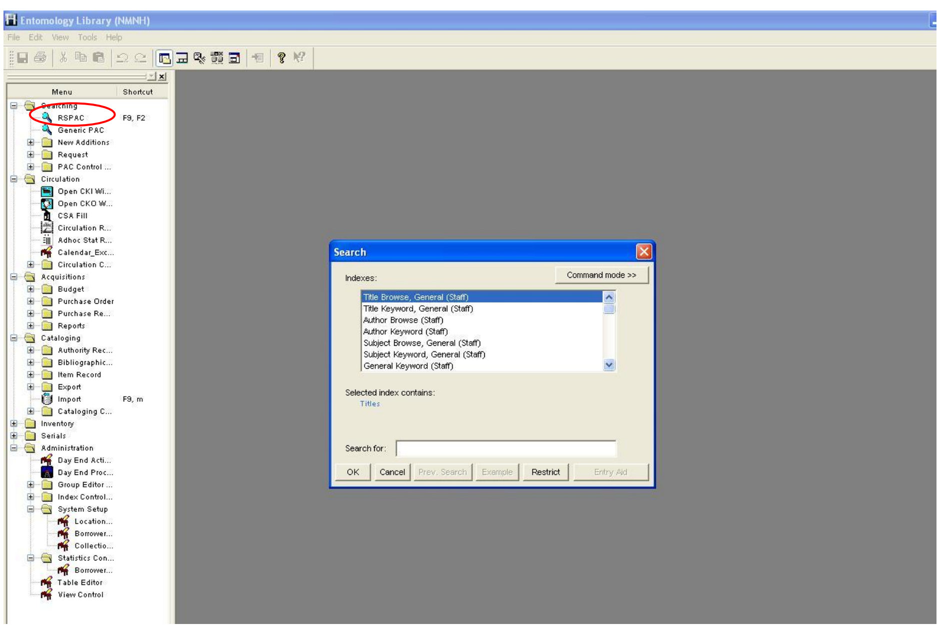
Once a collection of items requiring preservation review grows large enough, staff will contact an SIL Book Conservator to come review the items. The conservator will sort the items into those that cannot be scanned and those that should be scanned at either FedScan, on the Scribe, or at Pennsy. Once this review is complete, staff will process the books accordingly, continuing with the following steps.

Metadata Review and Sorting:

Once items have been checked for scanning viability and have been sorted by location according to condition (i.e. scan at FedScan, Pennsy, or Scribe), staff review the metadata associated with each item.

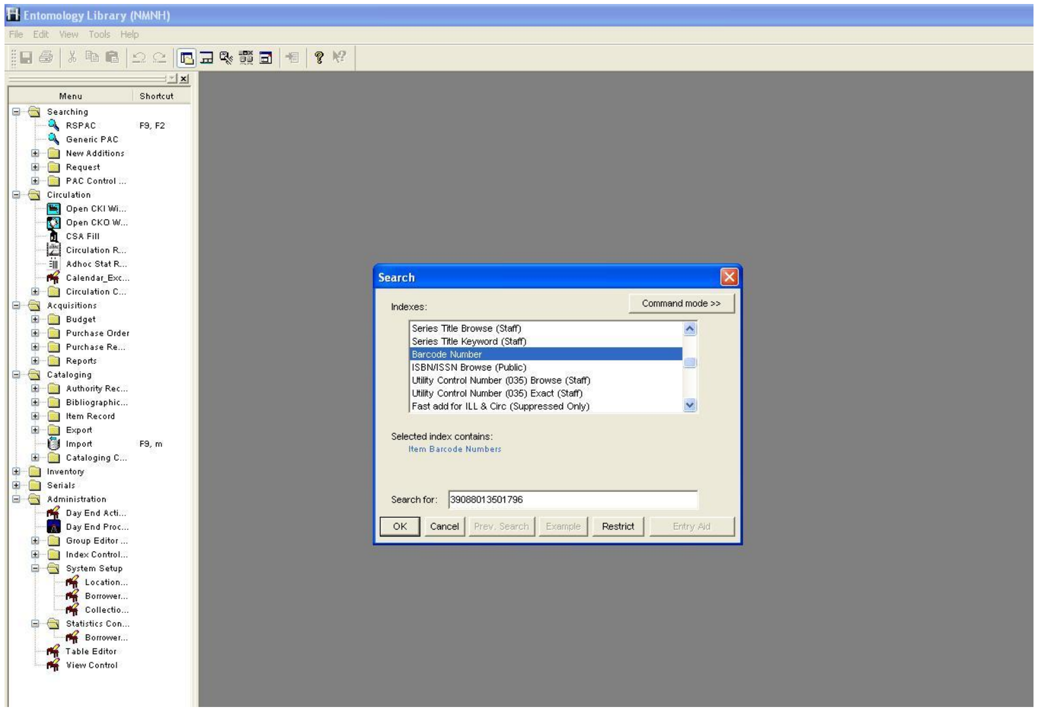
To begin, log into Horizon (SIL's ILS) and open the search box by pressing F2 or clicking on RSPAC under the Searching folder on the left hand side of the screen.

(Horizon Sign-In screen)



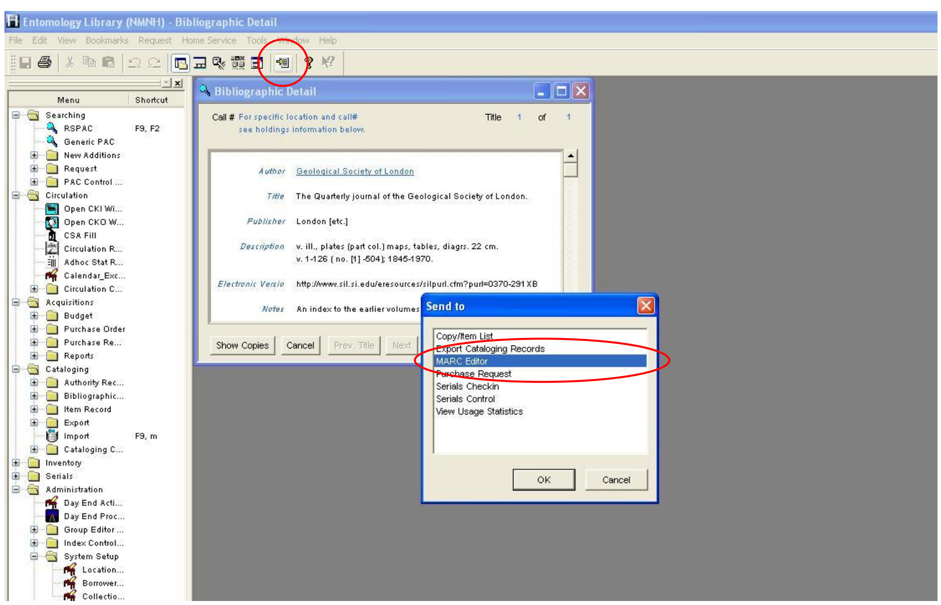
(Use F2 or RSPAC to bring up the search box in Horizon)

Choose a category to search by and find the record for the item in hand. It is usually easiest to search for the item by barcode.

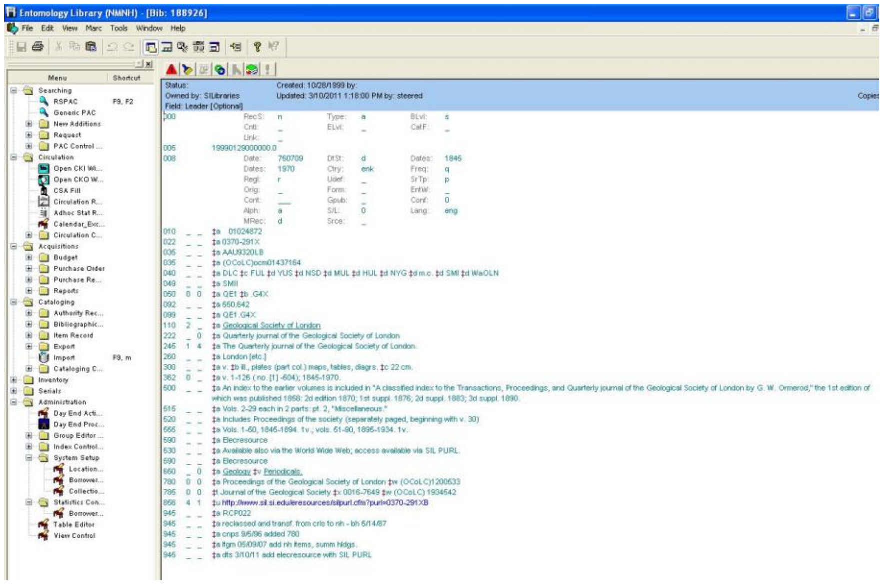


(Searching by Barcode in SIRIS)

Once the item has been found and you are looking at the “Bibliographic Detail” box (see screenshot below), view the record in MARC format. If you search by barcode, the “Bibliographic Detail” box will automatically open. If you search by another field, you may have to double-click on the record you want in the search result list to bring up the “Bibliographic Detail” box.



(To view in MARC format once your Bibliographic Screen appears, click on the upper-most icon circled in red to bring up the “Send To” box and choose “MARC Editor.”)



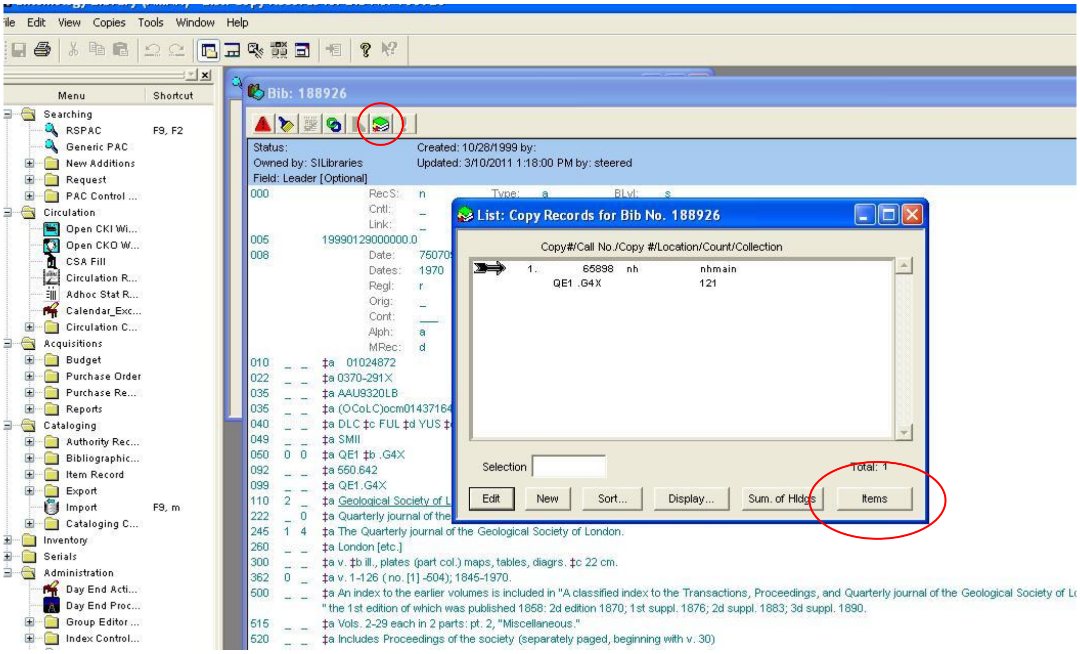
(Record in MARC format)

Finally, compare the item in hand to the metadata in the MARC record. Review the following sections in particular:

MARC field 100/110: Author/Creator
MARC field 245: Title
MARC field 260: Publisher, Place of Publication, Date
MARC field 300: Number of Volumes, Number of Pages, Size
MARC field 490 or 830: Series Statement
MARC field 780: Preceding Title
MARC field 785: Succeeding Title

If all above fields match the item in hand, the book passes metadata inspection and can move on to the next step in the process. However, if there is a discrepancy between the item in hand and the metadata, the book must go to cataloging for metadata correction.

After checking the title-level information, you must also confirm that the item-level information is correct (if applicable). If the item in hand has a volume/section/part/etc. number associated with it, bring up the list of items associated with this title record and confirm that the item-level information is correct. If is it not correct, the book must go to cataloging for metadata correction.



(Bring up the list of Copy Records for the title by clicking on the circled icon on the MARC record box and choosing "Items" from the Copy Records list box.)

Repeat this process for all items to be scanned.

Cataloging Correction

If the item must go to cataloging, print out a copy of the MARC record and write a note on the printout indicting where the information is incorrect. Insert this print-out in the problematic book and set the item aside in a cataloging correction pile/section.

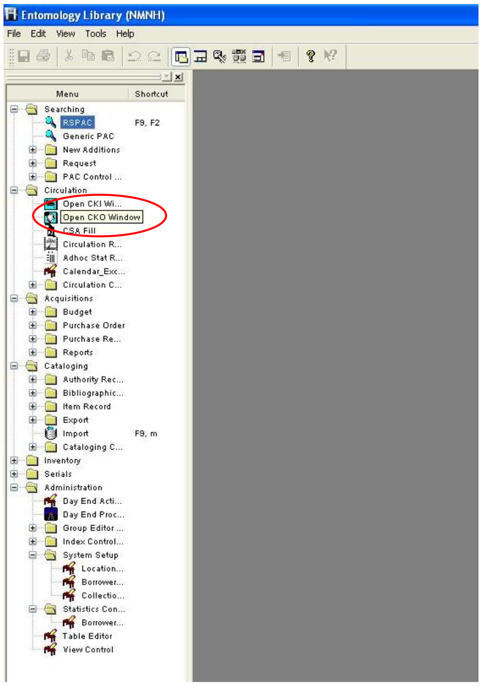
Check-out:

Once items have been sorted into the various categories following physical (scanning at either FedScan, Scribe, or Pennsy) and metadata (for cataloging correction if necessary) review, the next step in the pre-scanning process is to check the items out to the appropriate BHL borrower in Horizon. BHL has four borrower types to which items may be checked out. The following presents each borrower type and the circumstances under which an item will be checked out to that borrower:

SIL FedScan BHL	Non-fragile material with no metadata problems that will be sent to Library of Congress for Scanning
SIL NH Scribe BHL	Fragile or otherwise special materials that will be kept in-house for scanning
SIL Pennsy BHL	Oversized materials that will be sent to Pennsy for

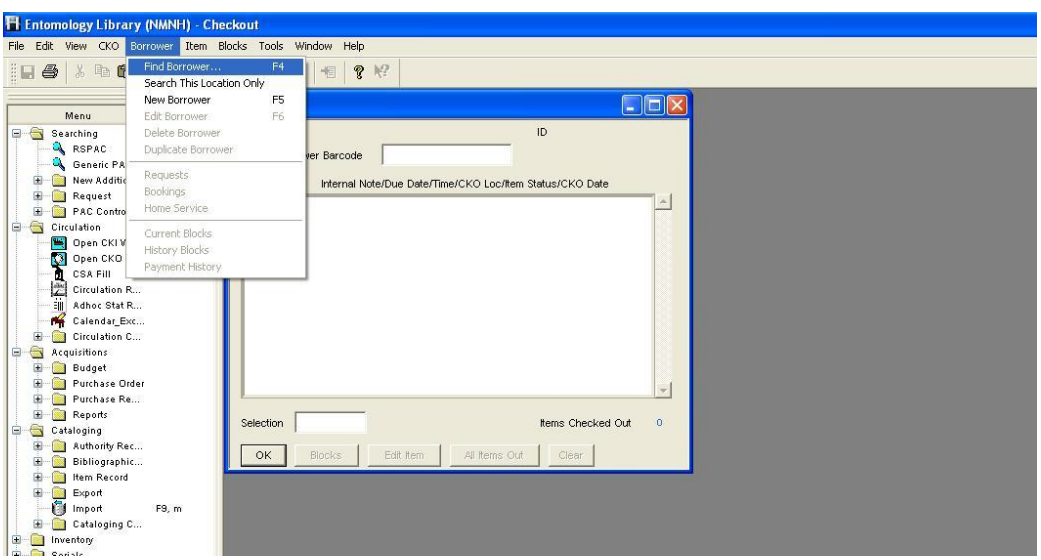
	scanning
SIL ContractCat BHL	Items that have metadata problems and thus need to be sent to cataloging for correction

To circulate items to the appropriate borrower, bring up the Checkout box in Horizon.

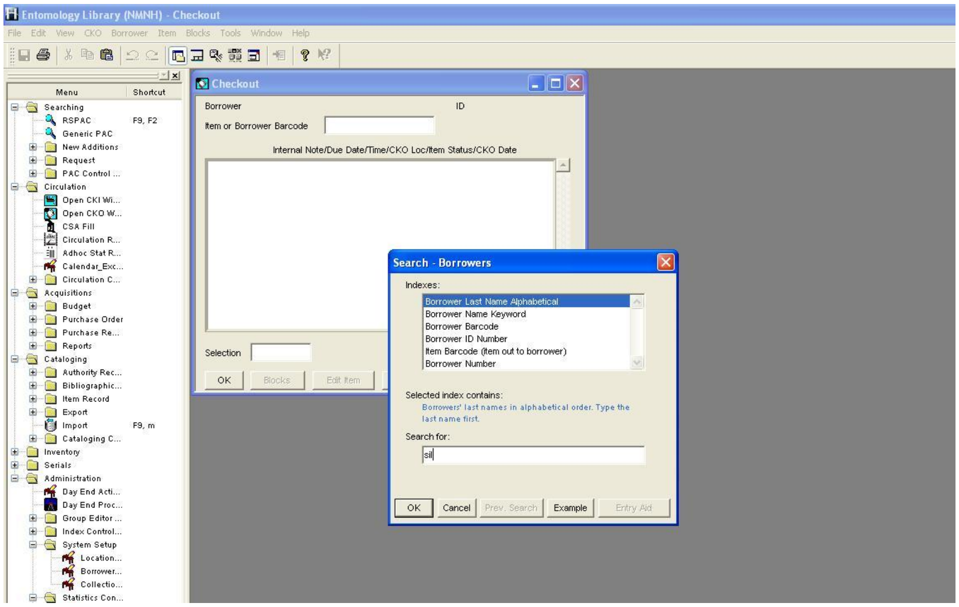


(Open the Checkout Box by clicking on “Open CKO Window.”)

After the Checkout Box opens, find the borrower that you want to circulate items to by searching for it in the borrower search box.

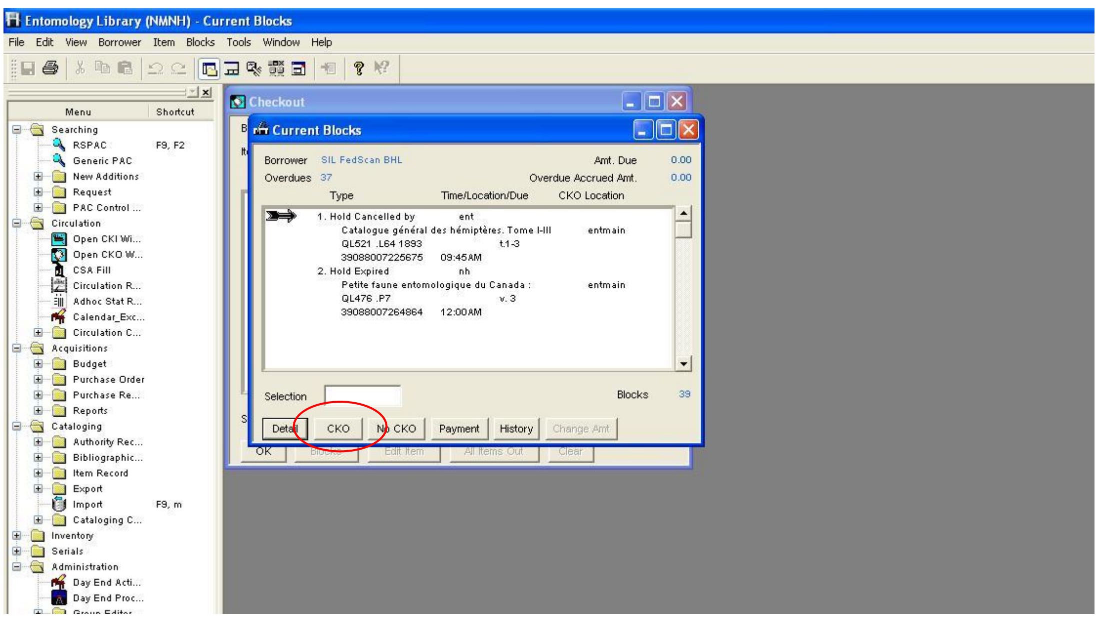


(From the “Borrower” heading, choose “Find Borrower”)



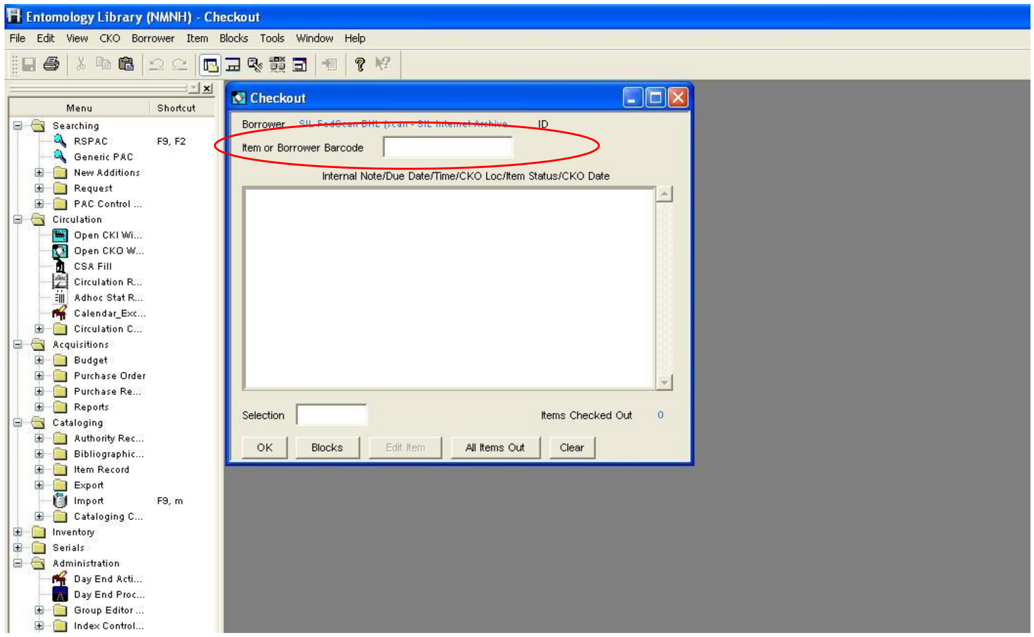
(Search box that appears after you choose “Find Borrower.” Search for the borrower by name and double click on it when you locate it.)

Click through any pop-up windows that may appear.



(Click “CKO” if any pop-up boxes appear.)

Wand in the barcode for all items to be checked out to that borrower.



(Once the borrower has been found, wand or type in the barcodes to checkout in the "Item or Borrower Barcode" field. A list of the items you are checking out will appear in the white space below the barcode field.)

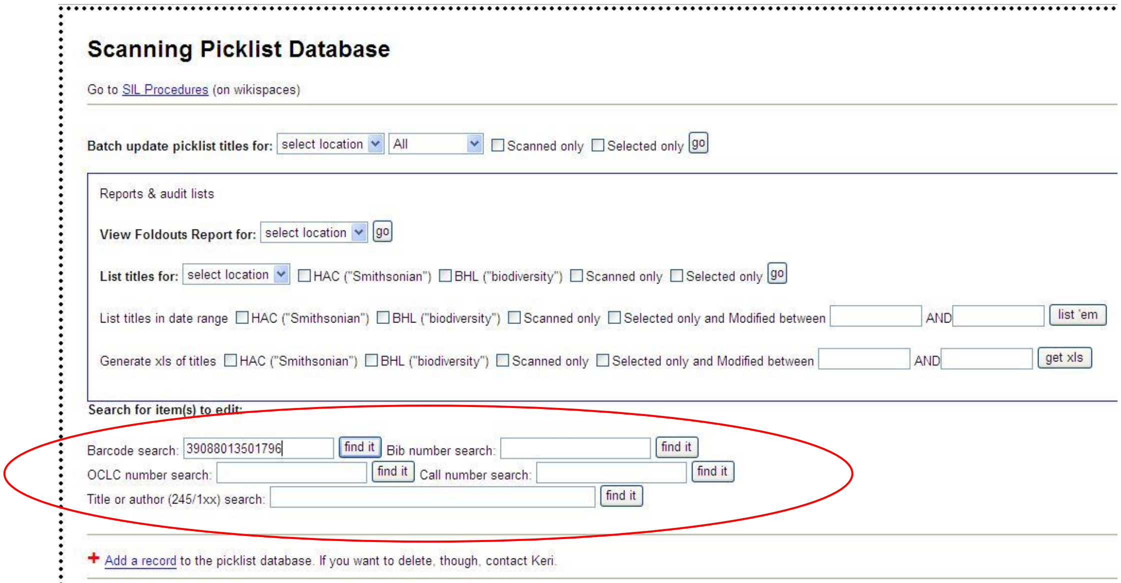
Once you have checked out all items to one particular borrower, close the check-out box and re-open it (following the steps outlined above), this time choosing the next borrower that you need to check out additional items to. Repeat this process for all borrower types that you have items for.

NOTE: If you have set items aside for Preservation Review by a book conservator, make sure that you check them out even if they are not yet reviewed and ready to proceed through the pre-scanning process. Check them out to the SIL BHL FedScan borrower.

Selection in Picklist

The next step in the process is to select the items for scanning at their appropriate locations. This is also the stage at which you will indicate any items that have been rejected for scanning. To begin, log-in to the Picklist Database, found at: http://prism.si.edu/sil/projects/245331/BHL_picklist.cfm. If you do not have log-in information, contact Keri Thompson at thompsonk@si.edu.

Once logged-in, find the record for each item awaiting scanning by searching by one of the available search methods. It is easiest to search for the item by barcode.

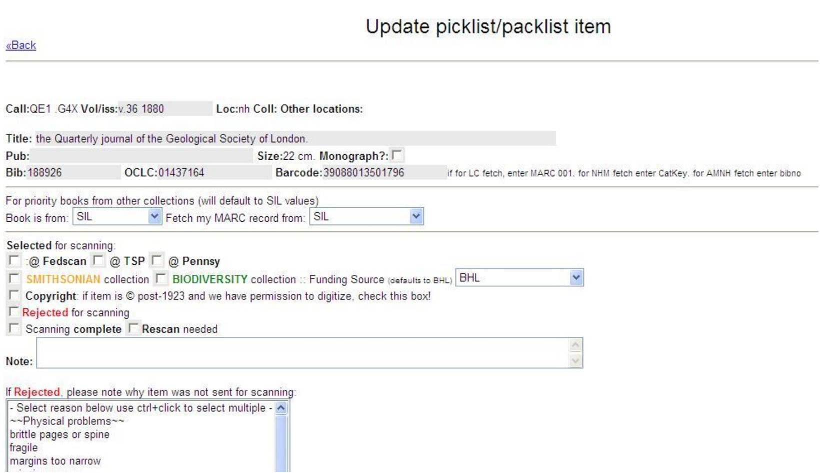


(Use one of the fields in the circled area to find the record you need. This image shows searching by barcode.)

Click on the search result that matches the item you want to select.

(Click on the correct record in the search result list. Searching by barcode will bring up the exact record. If you search by another method, you may have to choose among a list of possible matches to find the correct record.)

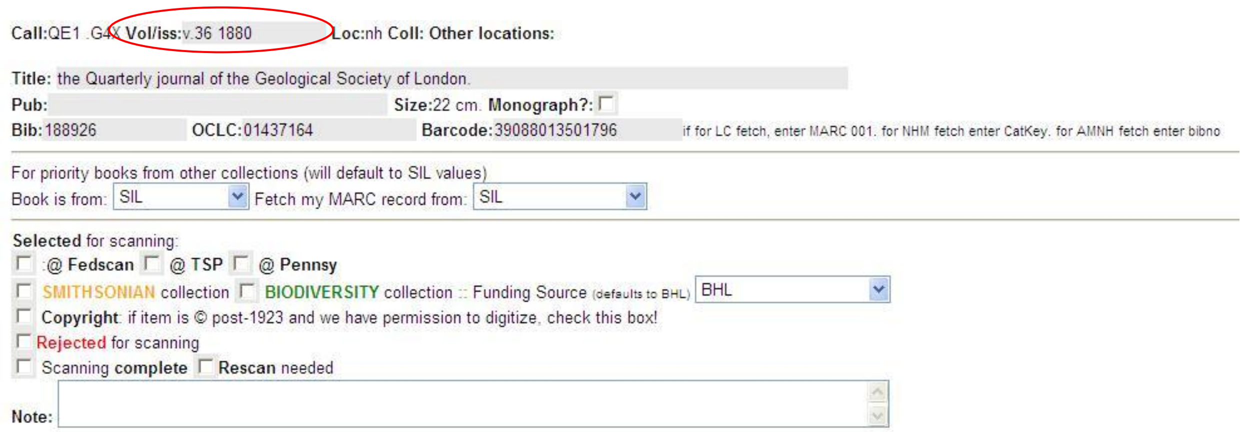
Once you have accessed the item screen, there are a few steps that you need to complete.



(Once you click on the correct record in the search result list, you will be taken to an item screen as pictured above.)

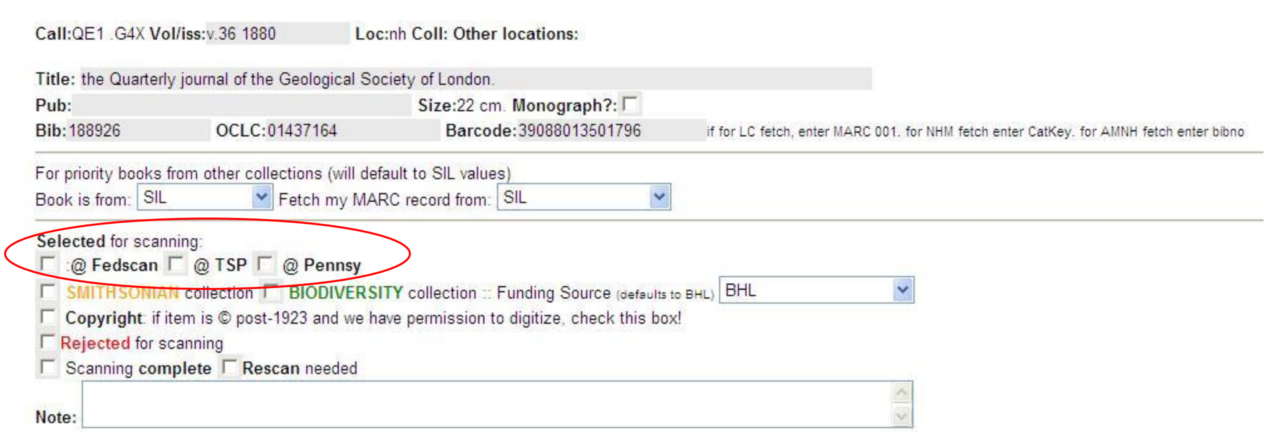
First, confirm that the volume information is correct in the picklist. This is very important because volume information for scanning is passed through the picklist instead of the MARC record. If the volume information is incorrect in the picklist, the item will be scanned under the incorrect volume number. The volume field in the picklist is edit-able, so if it is incorrect, edit it to display the correct information.

The appropriate standard for indicating volume information is: “volume number” (“year”).



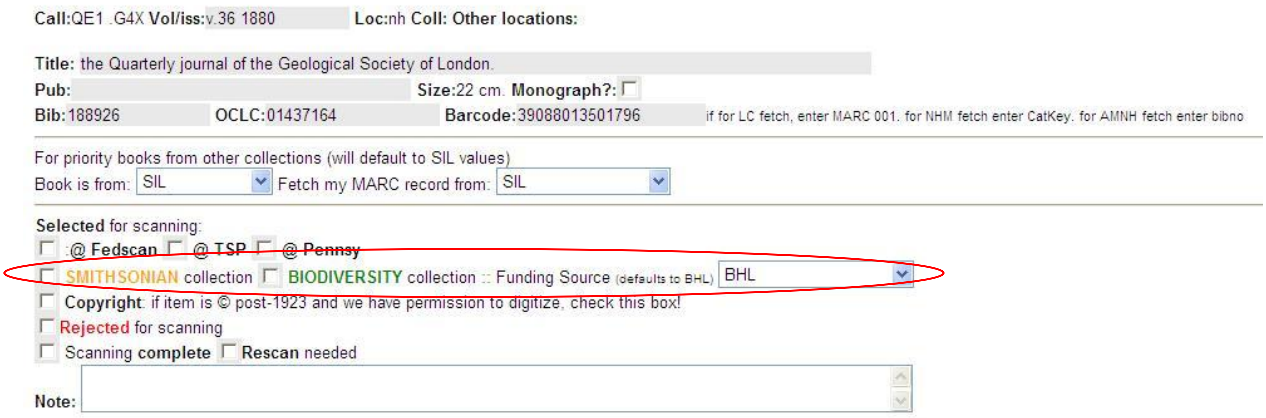
(Volume Field)

Second, select the location that the item will be scanned at.



(Scanning Location Check Boxes)

Third, indicate for which collection the item should be scanned under (Smithsonian or Biodiversity) and indicate the funding source. All items for BHL should be scanned under the Biodiversity collection. If they are scanned under the Biodiversity collection, then the funding source should be BHL (BHL is the default funding source). If the item is also a Smithsonian publication, or is written by a Smithsonian employee, then the Smithsonian collection box should *also* be checked, though the funding source will still be BHL. Only items for History, Art and Culture (HAC) should be scanned *only* under the Smithsonian collection. If the Biodiversity collection box is not checked, then the funding source *must not be* BHL. For more information on non-BHL scanning, contact Erin Thomas at ThomasE@si.edu.


Call:QE1 .G4X Vol/iss:v.36 1880 Loc:nh Coll: Other locations:

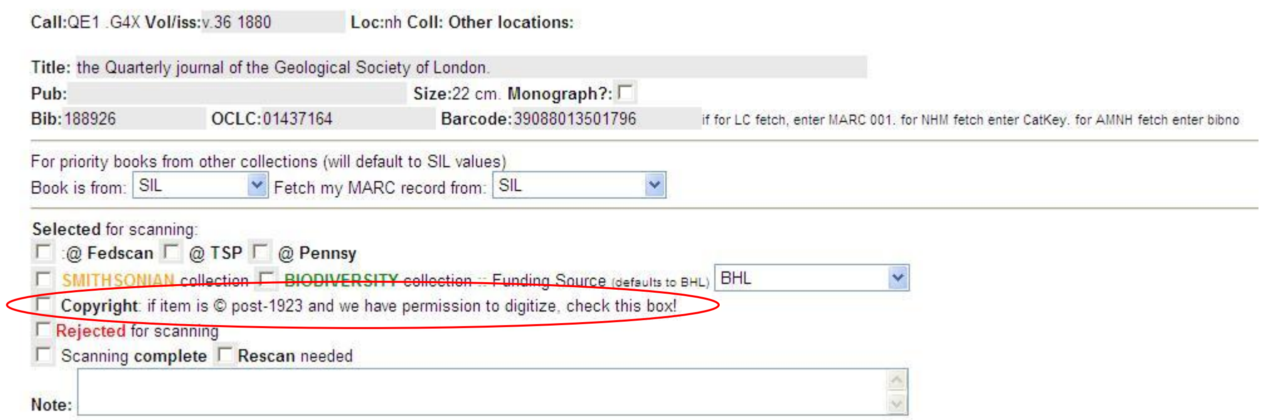
Title: the Quarterly journal of the Geological Society of London.
Pub: Size:22 cm. Monograph?:
Bib:188926 OCLC:01437164 Barcode:39088013501796 if for LC fetch, enter MARC 001. for NHM fetch enter CatKey. for AMNH fetch enter bibno

For priority books from other collections (will default to SIL values)
Book is from: SIL Fetch my MARC record from: SIL

Selected for scanning:
:@ Fedscan @ TSP @ Pennsy
SMITHSONIAN collection BIODIVERSITY collection :: Funding Source (defaults to BHL) BHL
Copyright: if item is © post-1923 and we have permission to digitize, check this box!
Rejected for scanning
Scanning complete Rescan needed
Note:

(Collection and Funding Source Field)

Fourth, if the item is still in copyright, but one for which we have permission to scan, make sure that the Copyright box is checked.


Call:QE1 .G4X Vol/iss:v.36 1880 Loc:nh Coll: Other locations:

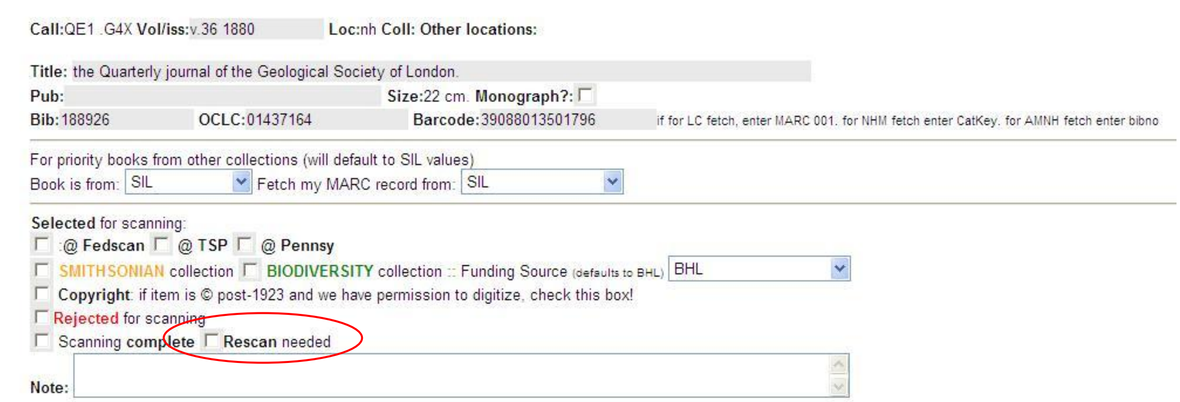
Title: the Quarterly journal of the Geological Society of London.
Pub: Size:22 cm. Monograph?:
Bib:188926 OCLC:01437164 Barcode:39088013501796 if for LC fetch, enter MARC 001. for NHM fetch enter CatKey. for AMNH fetch enter bibno

For priority books from other collections (will default to SIL values)
Book is from: SIL Fetch my MARC record from: SIL

Selected for scanning:
:@ Fedscan @ TSP @ Pennsy
SMITHSONIAN collection BIODIVERSITY collection :: Funding Source (defaults to BHL) BHL
Copyright: if item is © post-1923 and we have permission to digitize, check this box!
Rejected for scanning
Scanning complete Rescan needed
Note:

(Copyright Field)

Fifth, if the item in hand is being sent back for rescanning, make sure that you check the “rescan” box.


Call:QE1 .G4X Vol/iss:v.36 1880 Loc:nh Coll: Other locations:

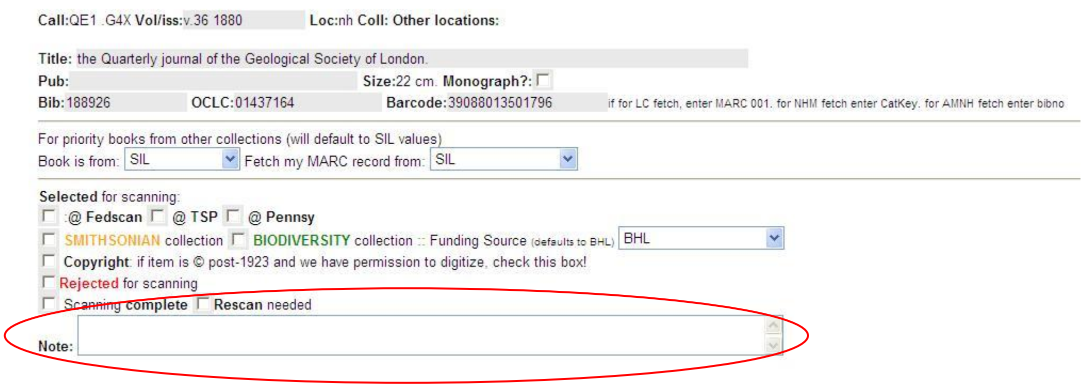
Title: the Quarterly journal of the Geological Society of London.
Pub: Size:22 cm. Monograph?:
Bib:188926 OCLC:01437164 Barcode:39088013501796 if for LC fetch, enter MARC 001. for NHM fetch enter CatKey. for AMNH fetch enter bibno

For priority books from other collections (will default to SIL values)
Book is from: SIL Fetch my MARC record from: SIL

Selected for scanning:
:@ Fedscan @ TSP @ Pennsy
SMITHSONIAN collection BIODIVERSITY collection :: Funding Source (defaults to BHL) BHL
Copyright: if item is © post-1923 and we have permission to digitize, check this box!
Rejected for scanning
Scanning complete Rescan needed
Note:

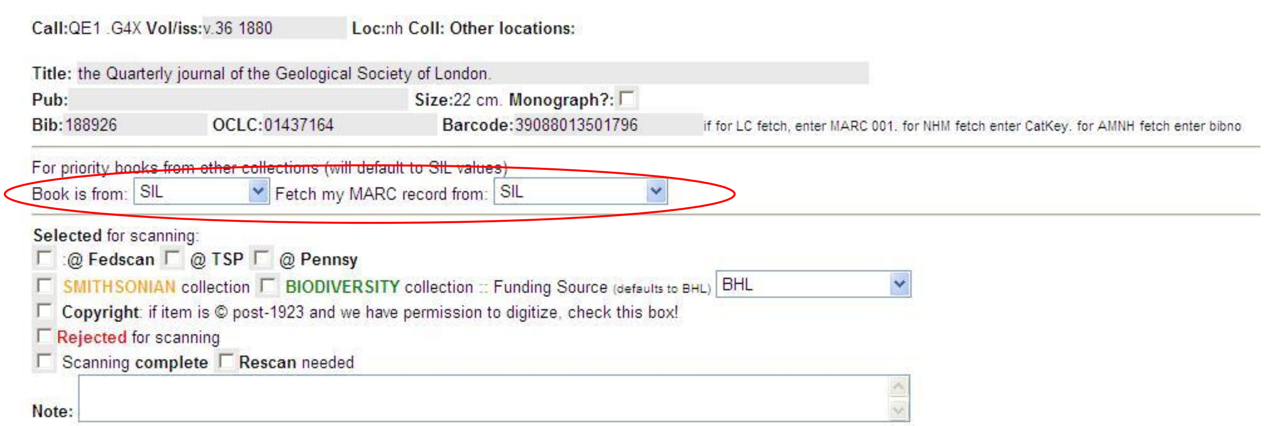
(Rescan Field)

Finally, if there are any notes that should be added about the item, insert them into the notes field.



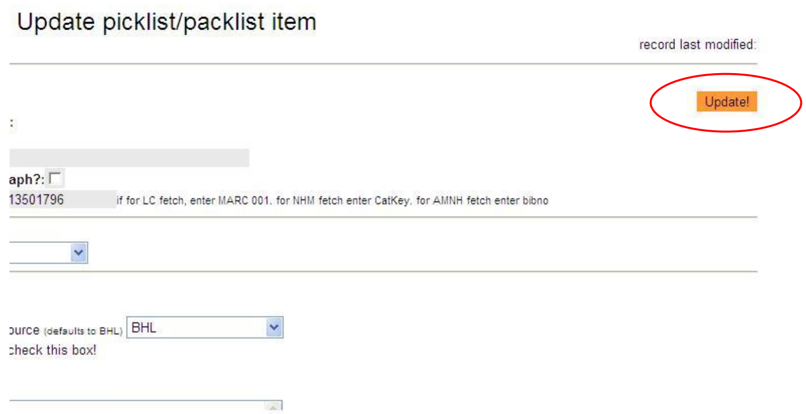
(Notes Field)

This completes typical picklist steps for BHL scanning. If the item being scanned is from an institution other than SIL, you may need to edit the fields indicating where the book is from and where the MARC record should be fetched from. The default for these fields is “SIL.” If the items are from another institution, or if the MARC record will be coming from a different institution, change these fields to the appropriate location.



(Library Source and MARC Record Source Fields)

Once all fields have been updated, check the “update” button in the upper right-hand corner. Repeat this process for all items.

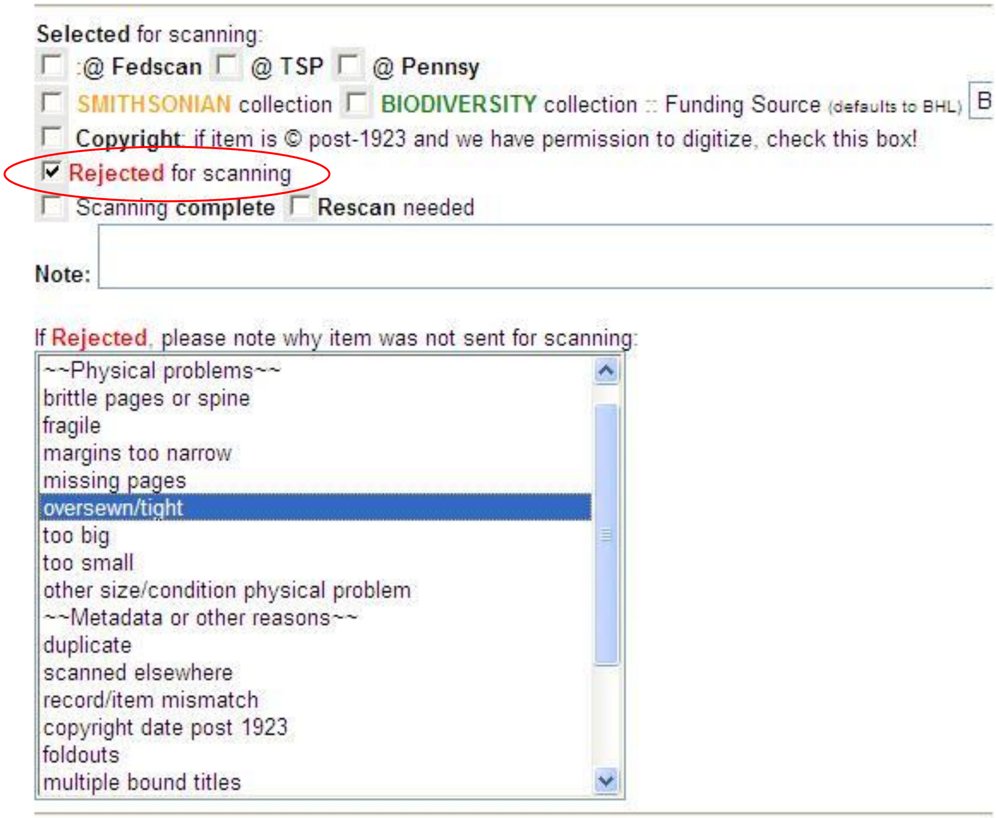


(Update button on item screen)

Rejected Items

At this point you will also need to indicate any items that you have identified as rejected for scanning. To do so, follow the above steps to get to the item screen for the rejected item. Once there, simply click the "rejected" box and indicate the reason for rejecting the item. Finally, hit the update button.

Once items have been indicated as "rejected," you can simply check them back in and re-shelve them (see steps below on checking-in, page 47).



(Indication of rejected and reason for rejection)

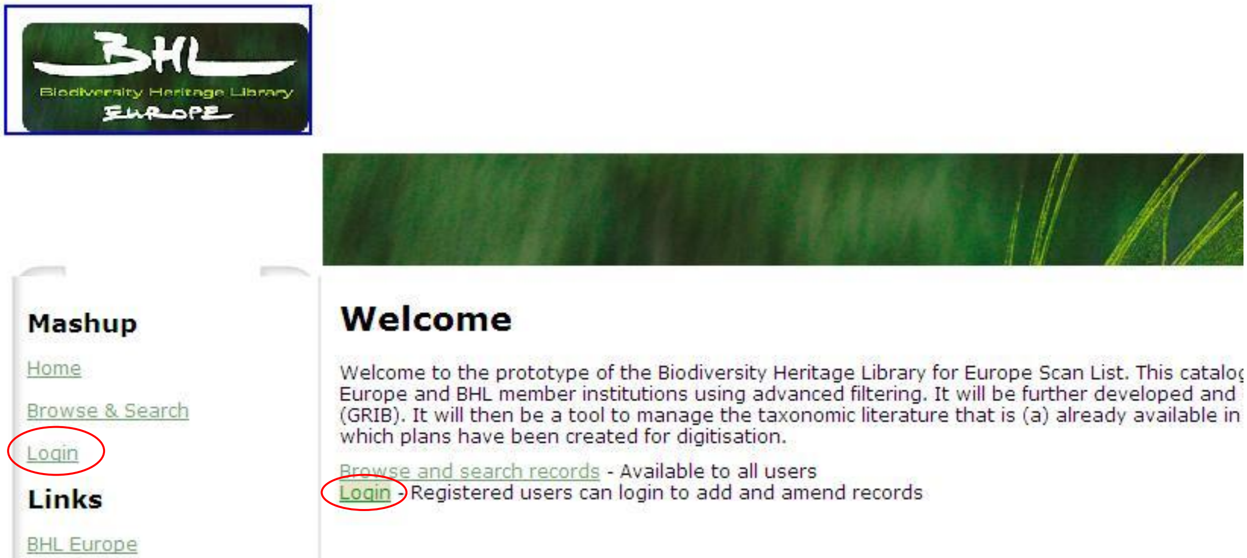
Deduplication

The next step in the pre-scanning process is to confirm that the items have not been scanned by any other institution. The process for determining this is different for monographs and serials.

Scanlist

For serials, you must use the scanlist both to confirm that no one else has scanned the volume(s) you want to scan and to indicate to others exactly which volumes of which titles you are scanning.

To begin, access the scanlist here: http://bhl.nhm-wien.ac.at/scanlist/index.php. Click on login, located on the left hand side and the middle of the screen.

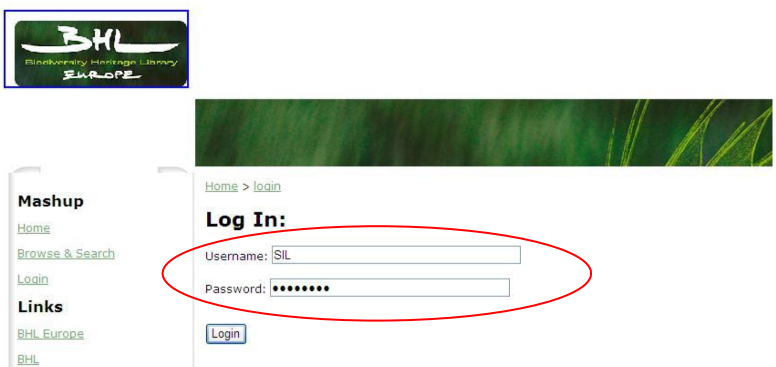


(Login links on Scanlist)

Enter SIL’s login information:

Username: SIL

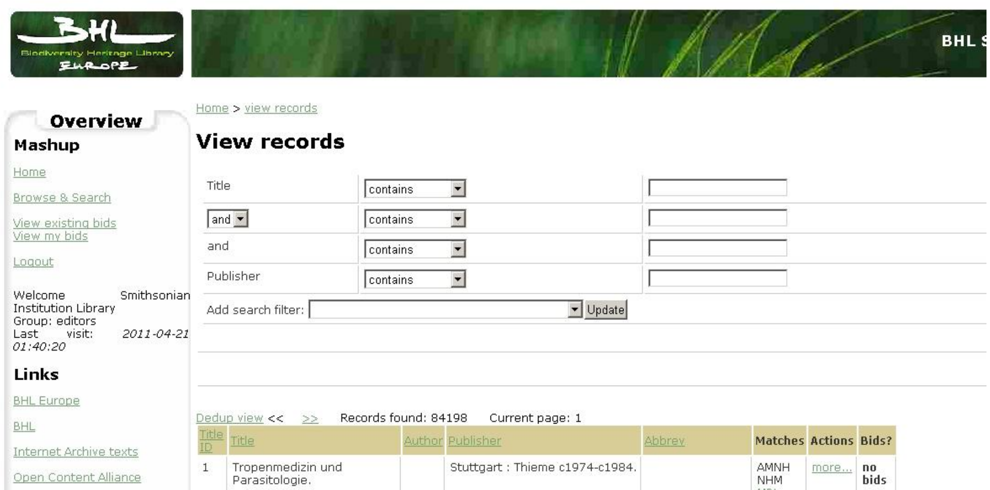
Password: 7Waspefr



(Login information for scanlist)

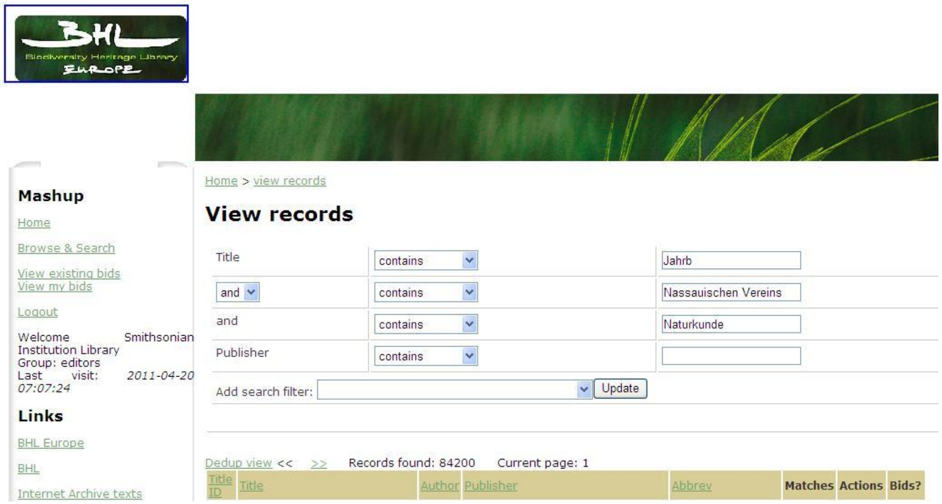
Once logged-in, you need to search for the various serial titles you will be scanning. To do this, choose the search fields you want to search by from the drop down menu. You may insert any number of as many of the fields as you want. Just click on the option in the drop down menu to add it.

(Dropdown menu for search categories on scanlist)



(Use of several different search fields in the scanlist)

When searching for titles, there are some things to remember. The scanlist does not handle diacritics or punctuation well when searching. Thus, it is best to leave these characters out and simply search for the text strings surrounding these characters. See example below for how to best search for *Jahrbücher des Nassauischen Vereins für Naturkunde*:

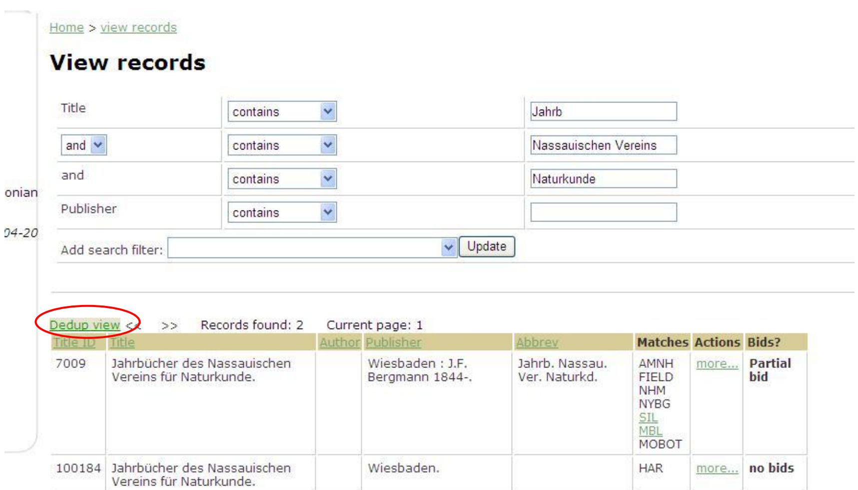


(Searching for a title without use of diacritics and punctuation)

Another aspect of the scanlist is the fact that all iterations of the same title may not be merged into a single instance in the scanlist. In other words, there may be duplicate entries for the same title in the scanlist. If this is the case, you will need to merge the duplicate title entries into one entry.

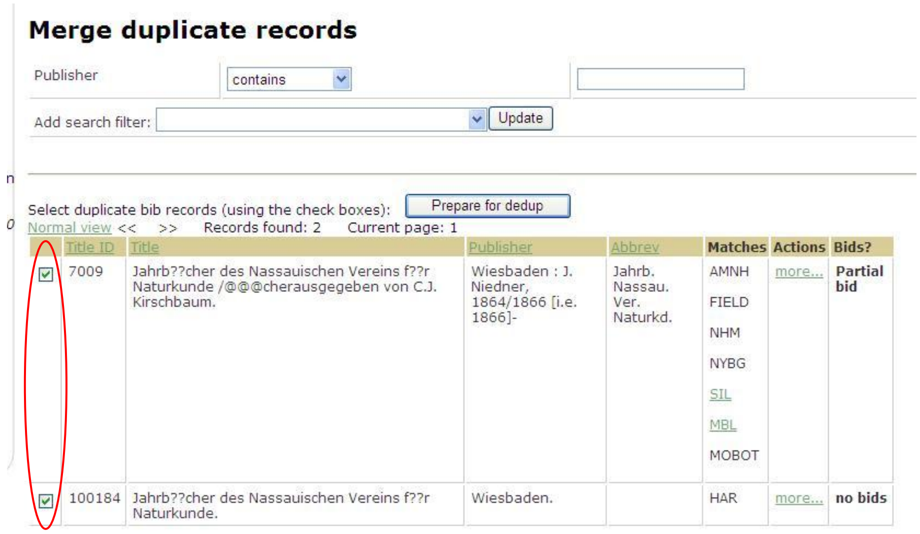
Merging Duplicate Titles

To merge duplicate titles in the scanlist, first click the "Dedup View" link.



(Dedup View in Scanlist)

Next, check each of the duplicate titles that you want to merge into a single entry.



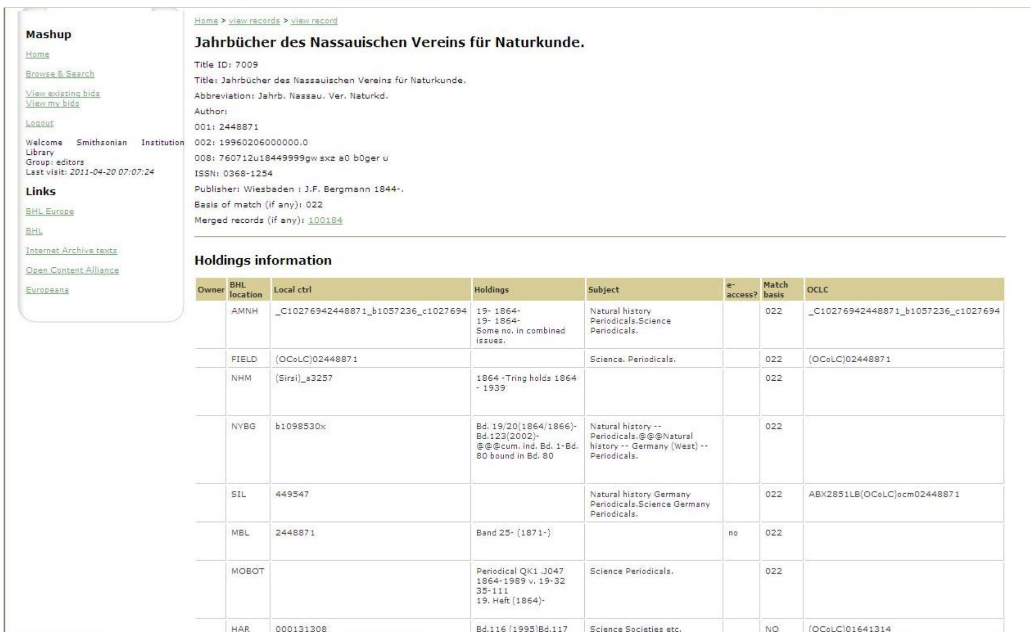
(Selection of items to dedup)

Once you have selected all desired duplicates, click on “prepare for dedup.”

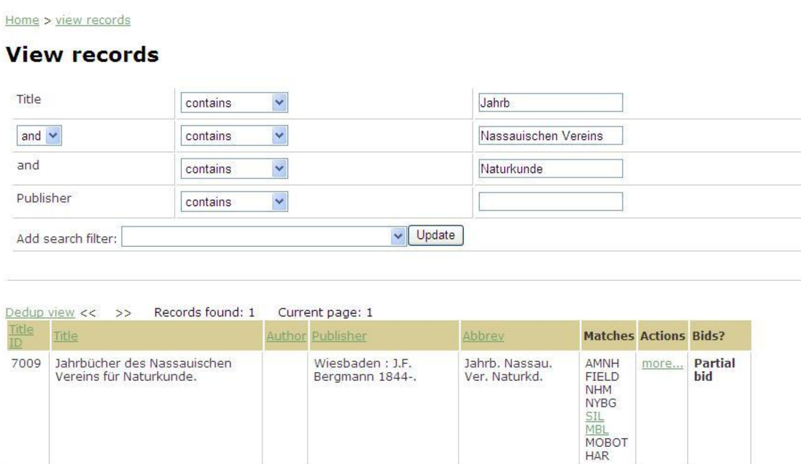
(Prepare for Dedup)

Finally, you will need to choose which of the selected title entries you want to serve as the “main” entry listed in search results for the title. This means that, depending on which entry you pick, search results for that title will look exactly like the entry you choose as the “main” entry. This will not delete the record of the holdings from the other institutions not listed in this particular entry. These will still be available in the detailed view of the title. They will simply not display in the initial list of search results. See screenshots below for further elaboration. To choose the “main” entry, select “use this” next to the entry you choose.

(Choose the record you want to serve as the “main” entry in the scanlist search screen)



(Multiple records merged into one as seen on detailed view of title)

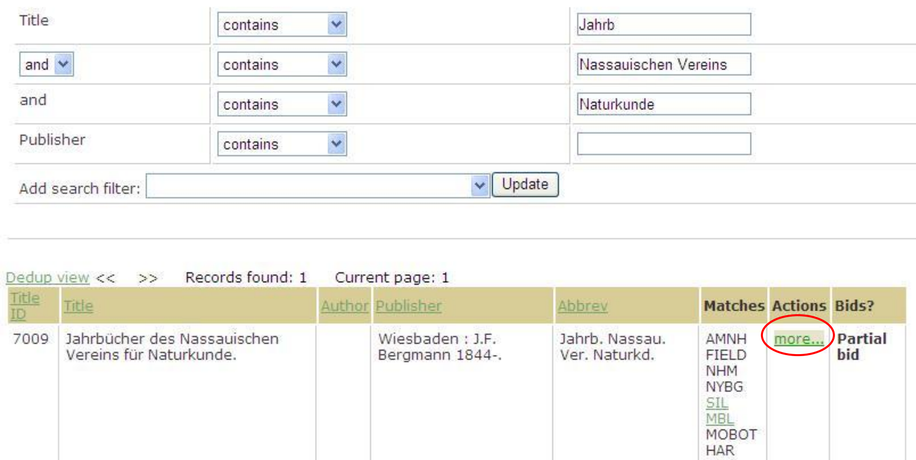


(Records merged together in scanlist search result screen)

Placing a Bid

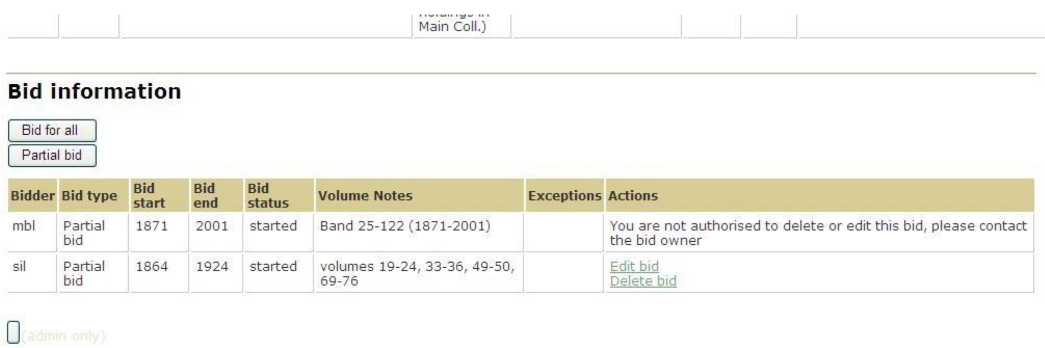
Once you have found the entry for your title in the scanlist, and performed any title merging necessary, you can now place a bid for the volumes you want to scan and confirm that no one else has already scanned them.

To begin, click the "more" option on the correct title in the list of titles returned for your search criteria to access the detailed view of the title. (If you merged multiple entries together, you will already be on the detailed view of the title after the merge is complete).



("More" link to see detailed view of record)

Scroll down to the bottom of the detailed page to see all bids associated with the title. Bids indicate those volumes that are being scanned by the institution that placed the bid. If you do not see a bid for the volumes you want to scan, you may proceed with scanning them. If you see a bid for a volume you want to scan, set the book aside and follow the *Rejected Items* (page 17) process outlined in the Picklist section.



(All bids placed on this title)

To place a bid, click on either "Bid for All" or "Partial Bid." Choose "Bid for All" only if you will be scanning all volumes of the title (this includes any post-1923 volumes that are part of the title). If you will only be scanning some volumes of the title, choose "Partial Bid."

(Partial Bid and Bid for All options)

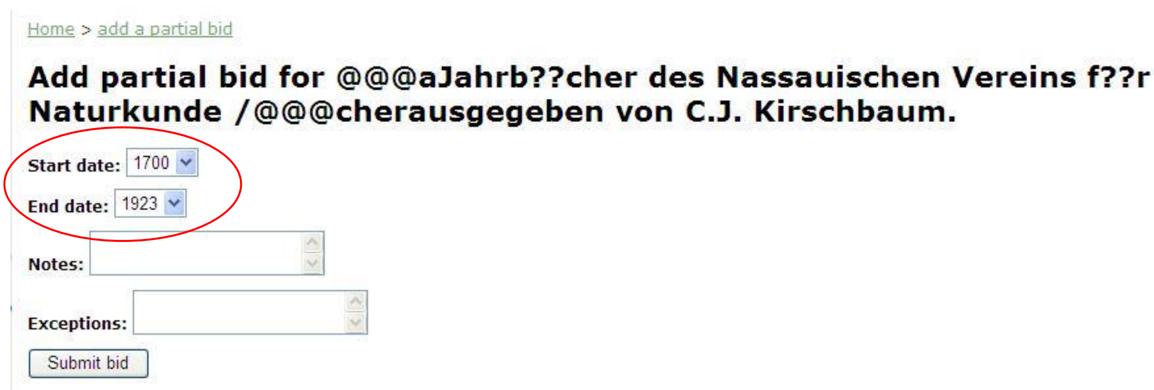
Bid for All

If you will be scanning all volumes of a title, simply click on "Bid for All," and you are finished. The scanlist will indicate that you are scanning all volumes of the title, and that no one else should scan any volumes.

Partial Bid

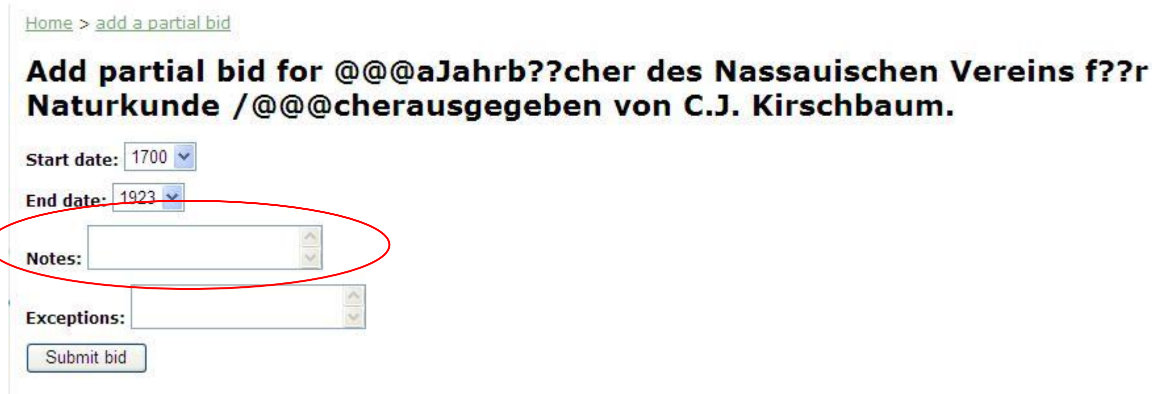
If you are only scanning some volumes of a title, click on "Partial Bid." You will be taken to a screen on which you can indicate which volumes you are going to scan.

First, indicate the year of the earliest volume you are going to scan. Next, indicate the year of the most recent volume you are going to scan.



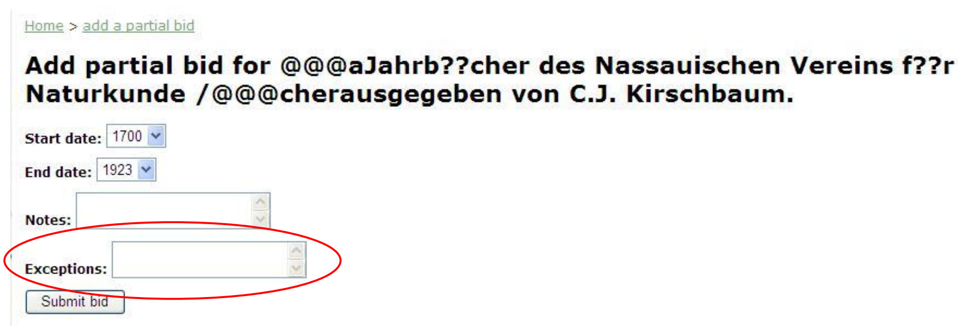
(Year Fields)

Next, indicate which volumes you are going to scan in the "Notes" field. This is a free text field, and there is no specific format in which you must enter the volume information.



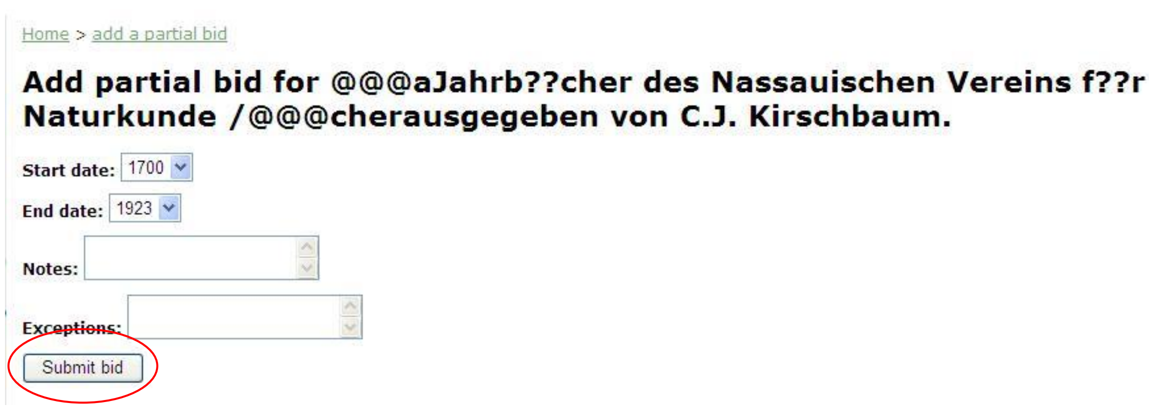
(Notes Field for entering volume information)

If you are not scanning all volumes in a chronological sequence (i.e. you are scanning only v. 1-3 and 5-8 of a title), you can indicate this gap in two ways. You can either place the volume information of “v. 1-3 and 5-8” in the notes field, or you can bid for “v. 1-8” in the notes field and use the “exceptions” field to indicate “v. 4” as an exception. Exception simply refers to those volumes that you will not be scanning in a run that you indicate in the notes field. Either method is perfectly fine.



(Exceptions Field to add volume exceptions not scanned)

Once all information is added, click “Submit Bid.”



(Submit Bid)

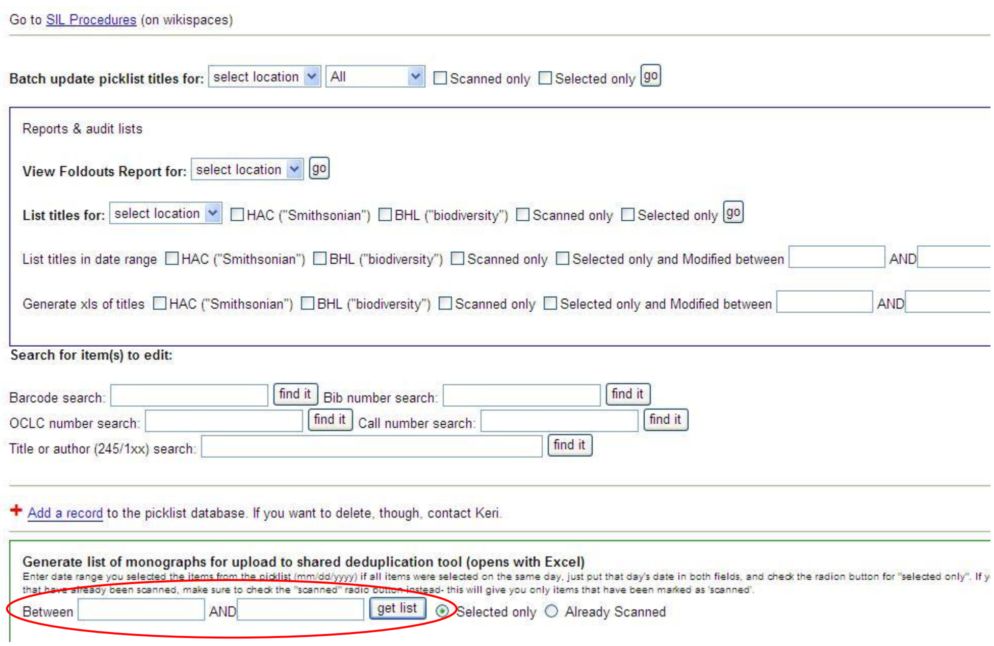
Repeat this process for all serial titles you want to scan.

Monographic De-Duper

To determine whether anyone has already scanned any monographs that you want to scan, and to indicate to other institutions which monographs you will be scanning, you must use the monographic de-duper. The monographic de-duper can be accessed here: http://dedup.mbl.edu/.

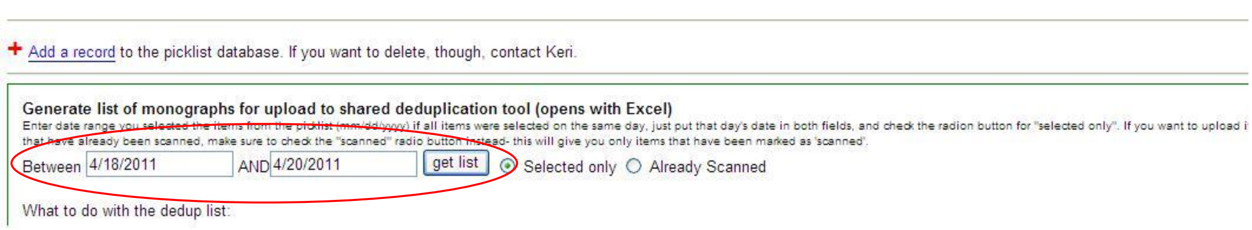
Generating List of Monographs

Before you can use the monographic de-duper, you must first generate a list of the monographs that you want to scan. You can generate this list, in the form of an xls file, via the picklist. To generate the list, input the date range (in the format mm/dd/yyyy) during which you "selected" (updated with a scanning location indicated) the monographs that you want to scan in the "Generate list of monographs for upload to shared deduplication tool (opens with Excel)" section of the picklist.



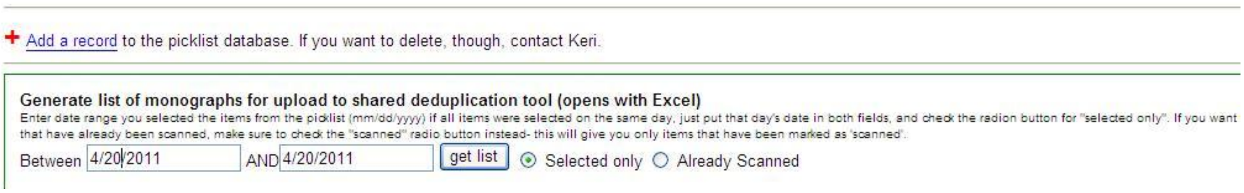
(Fields for indicating date ranges to generate monographic de-duper spreadsheet)

For example, if you "selected" monographs that need to be de-duped over a three day period, you would input the following date ranges:



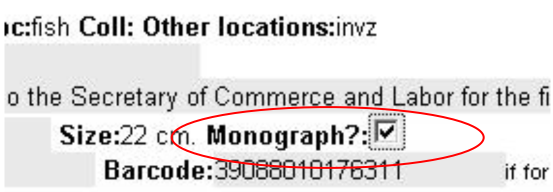
(To indicate a three-day selected range)

If you selected everything you want to input into the monographic de-duper on the same day, input the following date ranges:



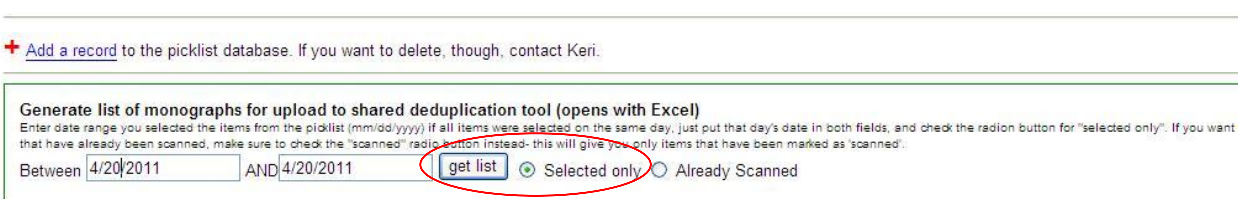
(To indicate same-day selected range)

So, to summarize, in order to generate a list of the monographs that you want to put into the monographic de-duper, **you must be certain that all of these monographic records in the picklist are marked as "selected"** for one of the available locations (FedScan, TSP, Pennsy), and you must know the date range during which you marked *all* of the desired records as selected or last updated these selected records. On the other hand, as long as the records are selected, you can simply hit "update" on each individual record on a certain day, or between certain days, in order to create a date range for all desired records that you can input into the picklist to create a spreadsheet for the monographic de-duper. Again, make certain that the only monographic records that have a status of selected and were updated during the date range you want to use are those that you want to put into the monographic de-duper. (As an aside, it does not matter if "serial" records are updated during your desired date range. The spreadsheet tool in the picklist is designed to only pull those records that have the monograph button checked. If the "monograph" button on the individual record in the picklist is not checked, then it is a serial record (see image below)).



(Monographic Button on individual record in picklist. Indicates that this record is for a monograph)

Once you input the date ranges, click the "selected only" radio button and click "get list."

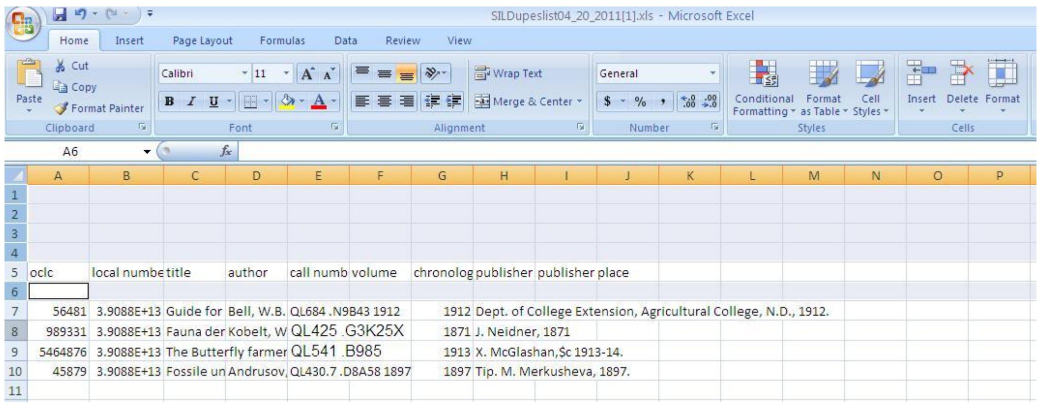


(Selected Only and Get List)

Formatting List of Monographs

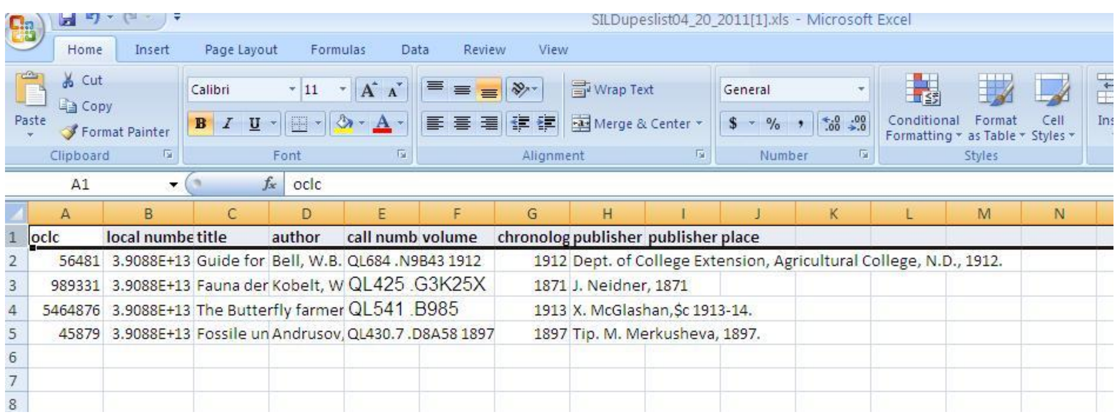
The picklist should automatically open the spreadsheet in Excel. Once the spreadsheet is open, you will need to format it before uploading to the monographic de-duper. To format, perform the following steps:

1) Delete all blank rows in the spreadsheet



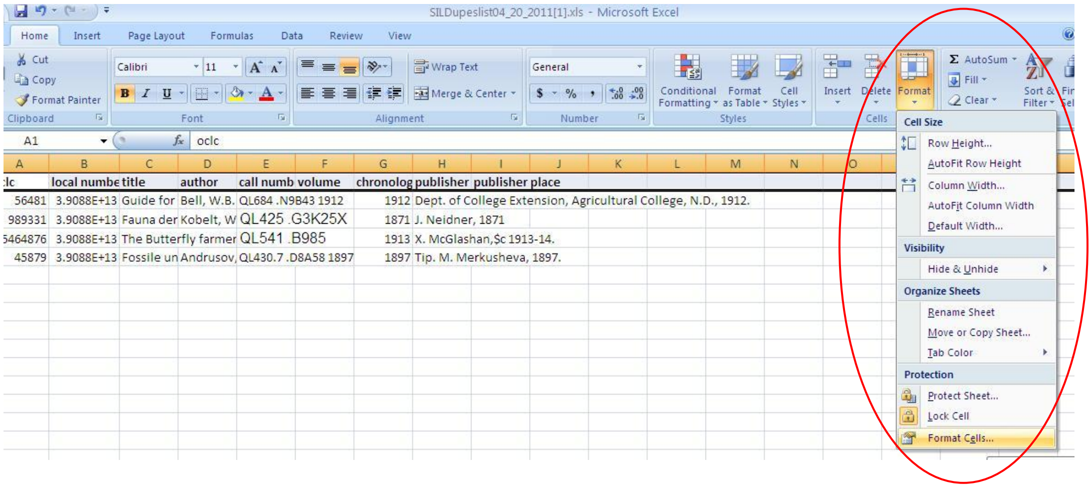
(Blank Fields to Delete in Spreadsheet)

2) "Bold" the first row of the spreadsheet

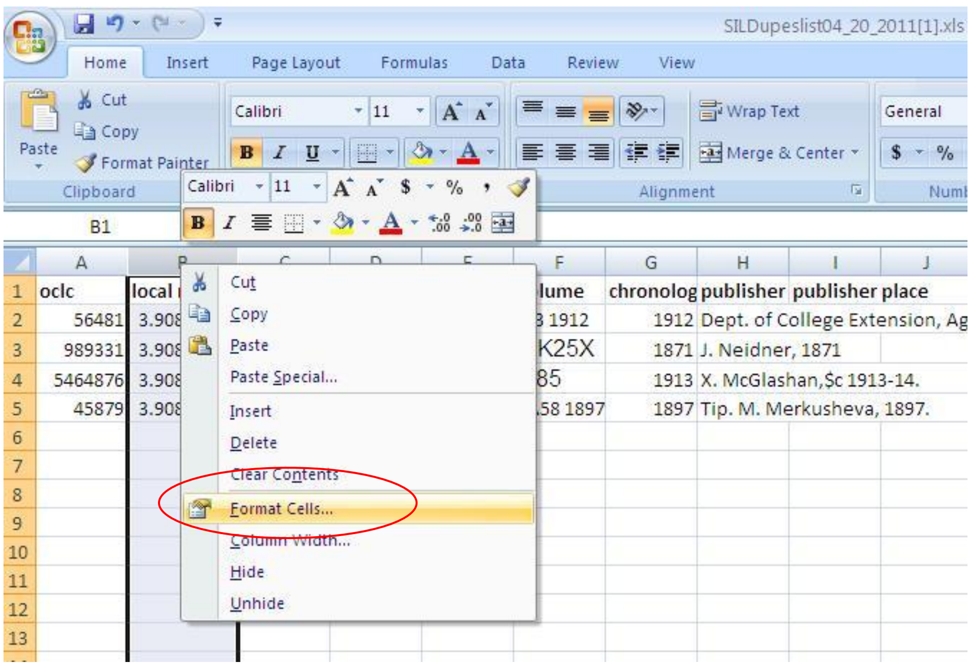


(First Row of Spreadsheet Bolded)

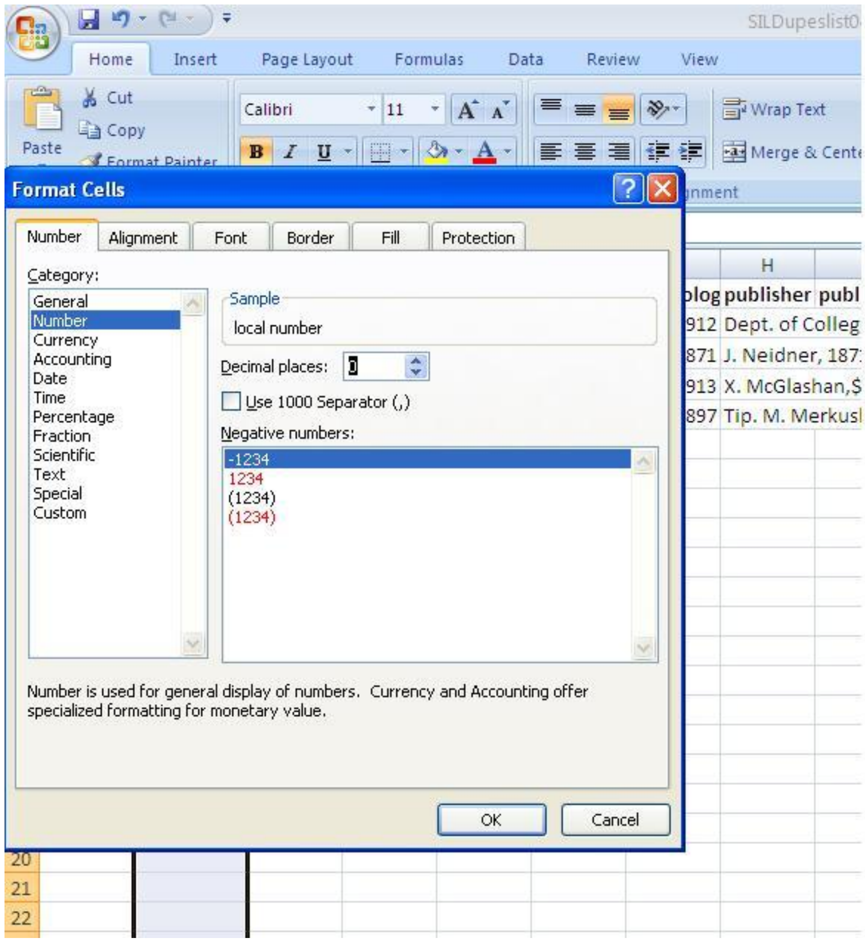
3) Format the "barcode" column by accessing "Format Cells," choosing "Number," and setting the "Decimals" to "0."



(Accessing Format Cells with Format Option on Home Tab)



(Accessing Format Cells by right clicking after selecting the “Local Number” column)



(Formatting Cells)

Once the spreadsheet has been formatted, save the file to the P drive in the following location: P:\ISD\BHL\SIL in BHL\Pack_Pick_Dupes_Lists. The correct format for naming the file is "SILDupeslistmm_dd_yyyy" where mm is replaced with the month (place a "0" before the month number if it is not a two-digit number), dd is replaced with the date (place a "0" before the date number if it is not a two-digit number), and yyyy is the year.

Uploading To and Using the Monographic De-Duper

Once the spreadsheet is saved, you may now access the monographic de-duper: http://dedup.mbl.edu/. On the initial screen, sign in as the Smithsonian Institution.

(Choose Smithsonian Institution Libraries to login to the Monographic De-Duper)

The next screen lists all of the spreadsheets that have ever been uploaded for SIL. Thus, these spreadsheets represent every monograph ever scanned by SIL. All other BHL partner institutions have a similar screen when they login, listing all monographs they have ever scanned. Thus, the monographic de-duper is a database that contains records of every monograph ever scanned for BHL.

To upload the spreadsheet you just saved on the P drive, click on “Upload a new Picklist.”

(Upload Picklist)

On the next screen, click “browse,” navigate to the new spreadsheet, and double-click on it.

(Click Browse, navigate to the correct folder in the P drive, and find your spreadsheet)

Finally, click "upload picklist."

(Upload Picklist)

Once the spreadsheet is uploaded, you will automatically be returned to the screen listing all spreadsheets for SIL. Scroll down to the bottom of the screen, where you will see the new spreadsheet you just uploaded. Click "View Duplicates."

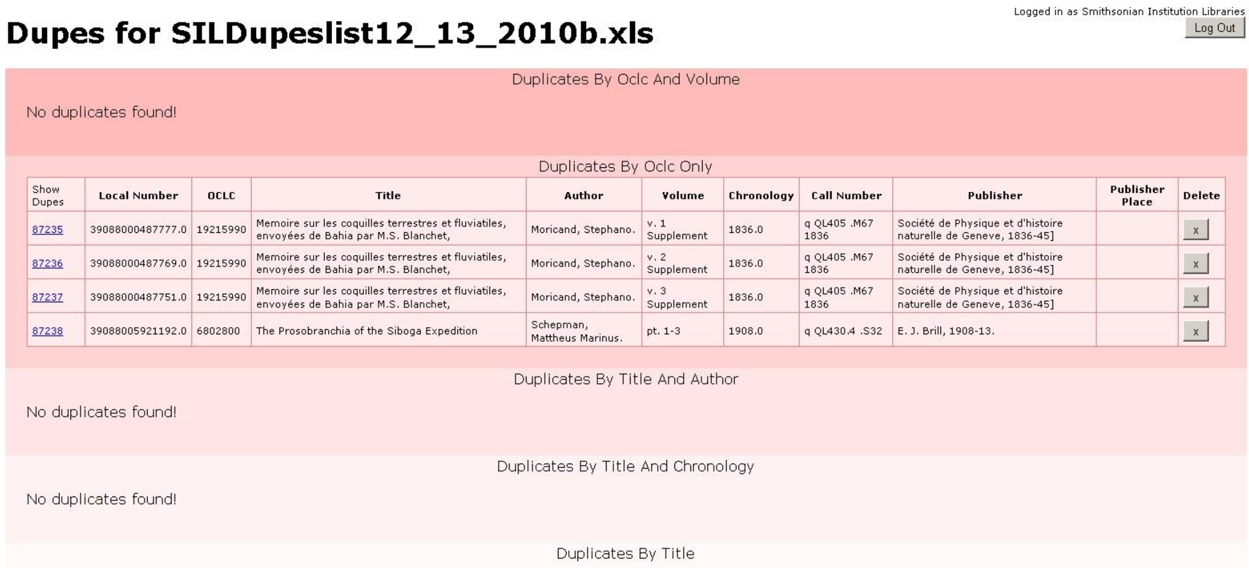
SILDupeslist1_5_2011.xls	View Duplicates	Show Picklist	Wed Jan 05 11:52:24 -0500 2011	x
SILDupeslist01_13_2011.xls	View Duplicates	Show Picklist	Thu Jan 13 12:15:11 -0500 2011	x
SILDupeslist03_09_2011.xls	View Duplicates	Show Picklist	Wed Mar 09 17:04:09 -0500 2011	x
SILDupeslist3_21_2011.xls	View Duplicates	Show Picklist	Mon Mar 21 09:14:39 -0400 2011	x
SILDupeslist3_23_2011.xls	View Duplicates	Show Picklist	Wed Mar 23 08:17:06 -0400 2011	x
SILDupeslist04_13_2011.xls	View Duplicates	Show Picklist	Wed Apr 13 10:53:08 -0400 2011	x

Jpload a new Picklist

(View Duplicates to see possible duplicates for the items you want to scan)

The next screen lists all items from the spreadsheet you just uploaded that may already be in the monographic de-duper as scanned. The monographic de-duper compares the entries in your spreadsheet to various fields on other spreadsheets and returns matches based on various criteria. These criteria and resulting matches are listed as sections on this screen. For example, in the first section the monographic de-duper compares the OCLC and volume numbers on your spreadsheet to those of all other entries already in the database. If OCLC and volume number match another record in the database, the record on your spreadsheet is listed in this section as a possible duplicate.

Various other sections include OCLC number only, Title and Author, Title and Chronology, and Title. For the purposes of de-duplication, it is really only necessary to check those records listed in the "OCLC and Volume" and the "OCLC Only" section.



Logged in as Smithsonian Institution Libraries
Log Out

Dupes for SILDupeslist12_13_2010b.xls

Duplicates By Oclc And Volume

No duplicates found!

Duplicates By Oclc Only

Show Dupes	Local Number	OCLC	Title	Author	Volume	Chronology	Call Number	Publisher	Publisher Place	Delete
87235	39088000487777.0	19215990	Memoire sur les coquilles terrestres et fluviatiles, envoyées de Bahia par M.S. Blanchet,	Moricand, Stephano.	v. 1 Supplement	1836.0	q QL405 .M67 1836	Société de Physique et d'histoire naturelle de Geneve, 1836-45]		x
87236	39088000487769.0	19215990	Memoire sur les coquilles terrestres et fluviatiles, envoyées de Bahia par M.S. Blanchet,	Moricand, Stephano.	v. 2 Supplement	1836.0	q QL405 .M67 1836	Société de Physique et d'histoire naturelle de Geneve, 1836-45]		x
87237	39088000487751.0	19215990	Memoire sur les coquilles terrestres et fluviatiles, envoyées de Bahia par M.S. Blanchet,	Moricand, Stephano.	v. 3 Supplement	1836.0	q QL405 .M67 1836	Société de Physique et d'histoire naturelle de Geneve, 1836-45]		x
87238	39088005921192.0	6802800	The Prosobranchia of the Siboga Expedition	Schepman, Mattheus Marinus.	pt. 1-3	1908.0	q QL430.4 .S32	E. J. Brill, 1908-13.		x

Duplicates By Title And Author

No duplicates found!

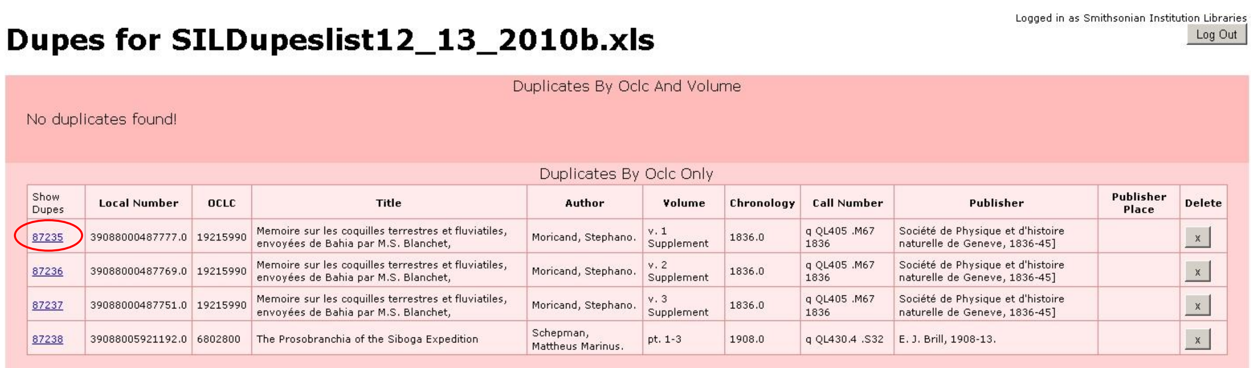
Duplicates By Title And Chronology

No duplicates found!

Duplicates By Title

(Various categories to compare duplicates, accessed after clicking "View Duplicates")

To determine whether those records listed are actual duplicates that have already been scanned, click on the number in the "show dupes" column.



Logged in as Smithsonian Institution Libraries
Log Out

Dupes for SILDupeslist12_13_2010b.xls

Duplicates By Oclc And Volume

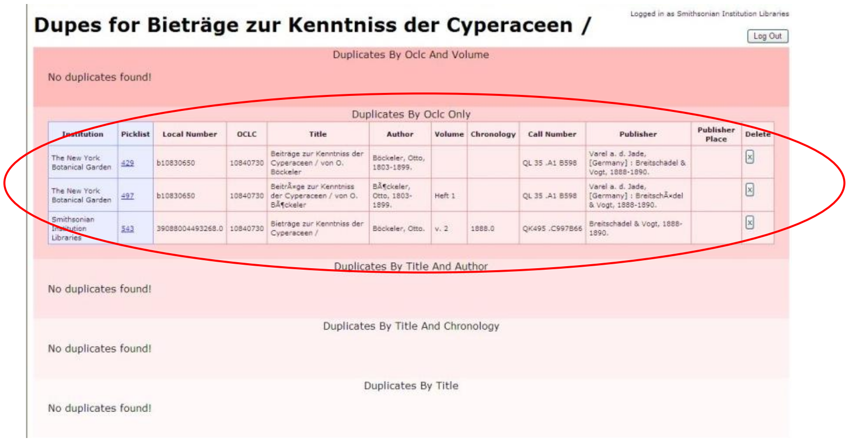
No duplicates found!

Duplicates By Oclc Only

Show Dupes	Local Number	OCLC	Title	Author	Volume	Chronology	Call Number	Publisher	Publisher Place	Delete
87235	39088000487777.0	19215990	Memoire sur les coquilles terrestres et fluviatiles, envoyées de Bahia par M.S. Blanchet,	Moricand, Stephano.	v. 1 Supplement	1836.0	q QL405 .M67 1836	Société de Physique et d'histoire naturelle de Geneve, 1836-45]		x
87236	39088000487769.0	19215990	Memoire sur les coquilles terrestres et fluviatiles, envoyées de Bahia par M.S. Blanchet,	Moricand, Stephano.	v. 2 Supplement	1836.0	q QL405 .M67 1836	Société de Physique et d'histoire naturelle de Geneve, 1836-45]		x
87237	39088000487751.0	19215990	Memoire sur les coquilles terrestres et fluviatiles, envoyées de Bahia par M.S. Blanchet,	Moricand, Stephano.	v. 3 Supplement	1836.0	q QL405 .M67 1836	Société de Physique et d'histoire naturelle de Geneve, 1836-45]		x
87238	39088005921192.0	6802800	The Prosobranchia of the Siboga Expedition	Schepman, Mattheus Marinus.	pt. 1-3	1908.0	q QL430.4 .S32	E. J. Brill, 1908-13.		x

(Link to see possible duplicates to the record in your spreadsheet)

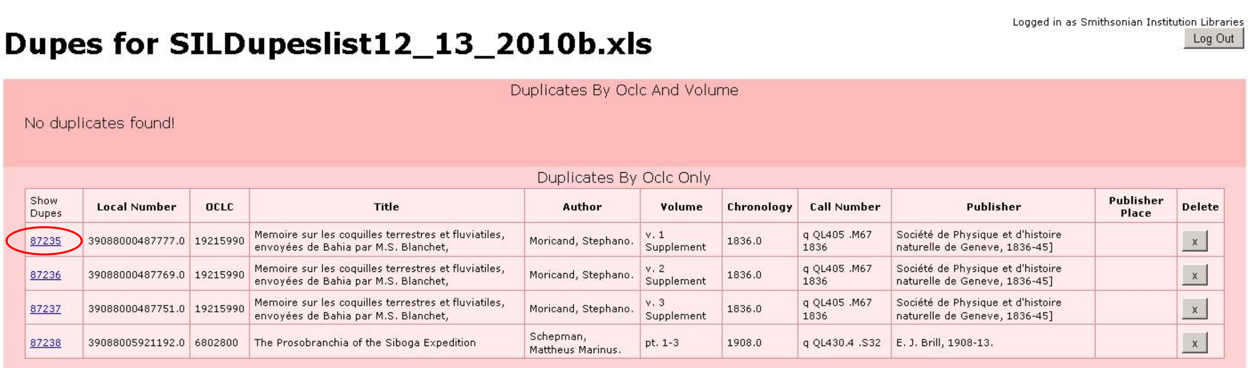
The resulting screen lists all records already in the monographic de-duper database that matched the criteria of that section (for example, in the OCLC and Volume section, this list is all existing records in the monographic de-duper database that match the OCLC number and volume for that record on your spreadsheet). You must look through each of the records on this screen to determine if they truly are duplicates to the record on your spreadsheet.



(List of items that may be duplicates (based on OCLC Number Only) to the record in the spreadsheet you uploaded)

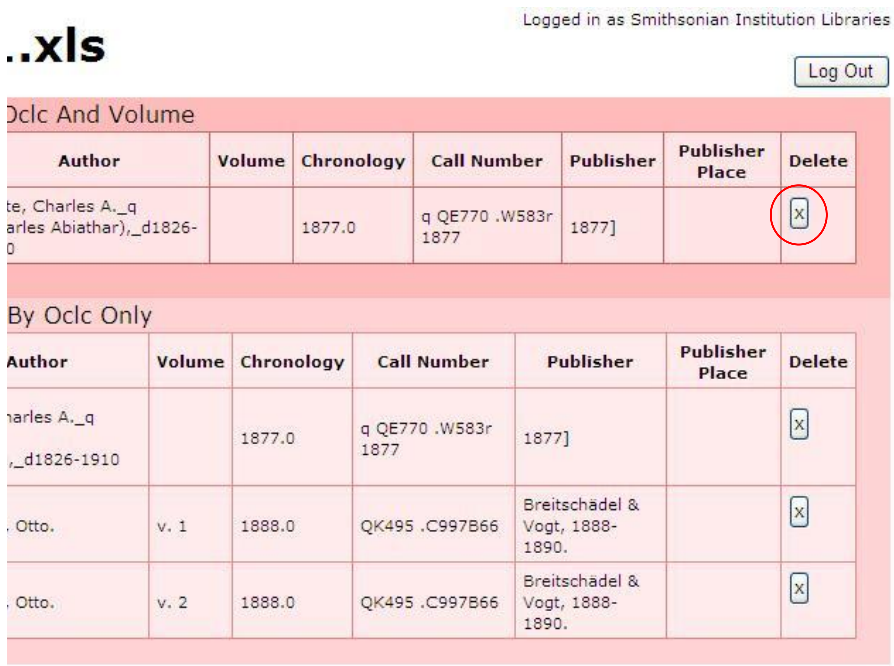
To flip back and forth between your spreadsheet records and the possible duplicates, use your Internet Browser back button to go back, and click on the "show dupes" column number to go back to the possible duplicates.

(Browser Back Button to go back to your spreadsheet)



(Show Dupes link to go back to the list of possible duplicates)

For any items that are true duplicates (meaning the duplicate entry in the monographic de-duper exactly matches the record in your spreadsheet), remove the record from your spreadsheet by clicking on the “x” in the “delete” column. Make sure that you delete the record from your spreadsheet and not from the existing list of records from other institutions.


..xls

Logged in as Smithsonian Institution Libraries

Log Out

Dclc And Volume

Author	Volume	Chronology	Call Number	Publisher	Publisher Place	Delete
te, Charles A._q arles Abiathar),_d1826-0		1877.0	q QE770 .W583r 1877	1877]		x

By Oclc Only

Author	Volume	Chronology	Call Number	Publisher	Publisher Place	Delete
harles A._q ,_d1826-1910		1877.0	q QE770 .W583r 1877	1877]		x
. Otto.	v. 1	1888.0	QK495 .C997B66	Breitschädel & Vogt, 1888-1890.		x
. Otto.	v. 2	1888.0	QK495 .C997B66	Breitschädel & Vogt, 1888-1890.		x

(To delete a duplicate record from your spreadsheet)

Once the record is deleted from your spreadsheet, follow the *Rejected Items* (page 17) instructions.

Repeat this process for all records listed in the “OCLC and Volume” and “OCLC Only” sections. If the records are not exact matches and are thus not duplicates, simply leave the records on your spreadsheet and send the item(s) for scanning.

Separate for Delivery and Prioritize as Necessary

The final step in the pre-digitization process is to separate the books according to the location they are going to, and prioritize them as necessary.

Take all items for FedScan to the FedScan staging area in the Scanning Room. If there are particular items that should be prioritized above others (see prioritization chart in previous section, page 4), place them on the “priority” shelf.

All items that are to be scanned at the Scribe should be taken and placed in the Scribe staging area in the Scanning Room. Priority items should be placed on the “Priority” Scribe shelf.

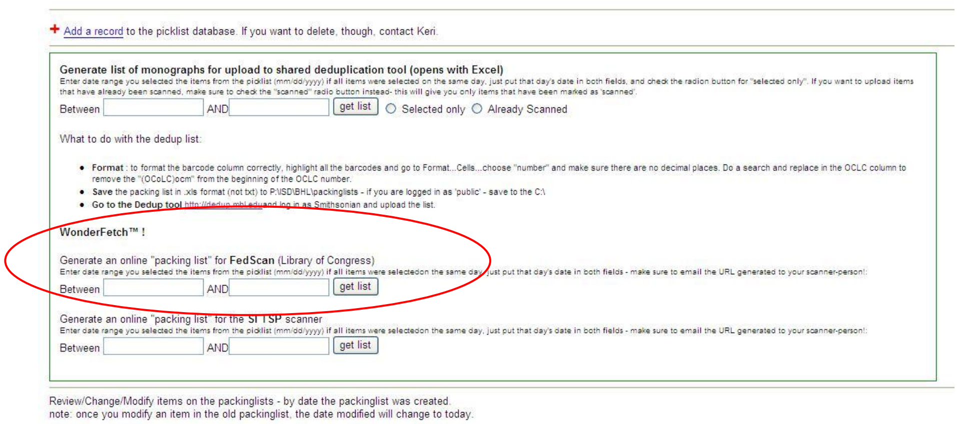
Pennsy items should be placed on the Pennsy staging shelf, where they will be sent out to Pennsy for scanning at regular shipment intervals.

Items with cataloging problems should be taken to Bess Missell (missellb@si.edu) and placed on the BHL cataloging correction cart. Tell Bess if any are a priority and need to be rushed. Once they are corrected and returned, as long as you have already processed them through all previous steps, they can simply be checked out to the new appropriate borrower and taken to the appropriate location for scanning.

Preparing Shipments: FedScan

Every week, SIL sends a new shipment to Fedscan and receives a scanned shipment back. To prepare a shipment for FedScan, a manifest must be created for all items that will be sent in the shipment. The link to this manifest must be emailed to the scanning center. It will be used by the scanners to pull the metadata for each item before scanning.

To generate a manifest, input the date range during which you "selected" (marked the scanning location as FedScan) the items you are sending for scanning. Make sure that during the date range indicated, you have only selected for FedScan the items you want to send in the shipment, otherwise the manifest will include items you are not sending in the shipment. Input this date range in the "Wonderfetch for FedScan" section of the picklist.



(Date fields to generate Manifest list for FedScan)

The resulting list of items comprises the manifest for the shipment. The URL provided at the top of the manifest should be sent to the scanning center in the shipment email. Make sure that the number of items in the manifest match the number of items you want to send.

Smithsonian Libraries Packinglist for Fedscan
http://www.bhl.si.edu/wonderfetch.cfm?date1=4/20/2011&date2=4/20/2011
Click on title/author information to pre-populate Biblio record

1. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 27 1899** Barcode:**39088013006762** Collection(s): Biodiversity
2. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 28 1899** Barcode:**39088013006770** Collection(s): Biodiversity
3. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 29 1899** Barcode:**39088013006788** Collection(s): Biodiversity
4. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 30 1899** Barcode:**39088013006796** Collection(s): Biodiversity
5. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 31 1900** Barcode:**39088013006804** Collection(s): Biodiversity
6. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 32 1900** Barcode:**39088013006812** Collection(s): Biodiversity
7. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 33 1900** Barcode:**39088013006820** Collection(s): Biodiversity
8. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 34 1900** Barcode:**39088013006838** Collection(s): Biodiversity
9. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 35 1900** Barcode:**39088013006846** Collection(s): Biodiversity
10. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887
Call no.: Volume/issue:**no. 36 1901** Barcode:**39088013006853** Collection(s): Biodiversity
11. Title: Bulletin - New York State Museum. Author:New York State Museum Year:1887

(Manifest resulting from entering a date range of selected items. The URL to send to the scanning center in the manifest email is circled.)

Send an email to the scanning center indicating how many items will be on the shipment and providing the URL for the manifest. Detail any rescans that you might be sending in the shipment as well (See *Returning QA Failed Items* section, page 42, for more information).

NOTE: Since shipments are often created from backlogs that have been selected over a wide range of dates, it is often easiest to build the shipment by simply re-updating the items from the backlog that you want to send that week. So, select the appropriate number of items from the backlog for the shipment and simply click "update" on each of them in the picklist to create a date range that will pull only the items you want to send in the shipment. Make sure that each newly-updated item is selected for FedScan, and that you do not update any other items selected for FedScan on the date you put the shipment together.

Furthermore, make sure that each item you are sending for scanning in a shipment has the "Packinglist Date" field filled in on the item screen. This date is the date on which you are sending the shipment. If the item is being resent for some reason, and thus already has a packinglist date, be sure to put the original packinglist date in the notes field for the record before inserting the new packinglist date.

If **Rejected**, please note why item was not sent for scanning:
- Select reason below use ctrl+click to select multiple -
~~Physical problems~~
brittle pages or spine
fragile
margins too narrow
missing pages
oversewn/tight
too big
too small
other size/condition physical problem
~~Metadata or other reasons~~
duplicate
scanned elsewhere
record/item mismatch
copyright date post 1923
foldouts

Packinglist date: 01/07/2010 **Manifest return date:** **IA id:**
Manifest note (from IA):

(Packinglist Date field with the date of the shipment indicated)

Preparing Shipments: Pennsy

In general, a new shipment of about 4-5 folio-sized, non-rare items are sent to Pennsy every other week. The staff member responsible for sending these shipments will create a manifest following the same steps outlined above, with the exception that the Pennsy location will be checked instead of the FedScan location. This staff member will also send an email to the Pennsy scanner, indicating which items are being sent in the shipment. However, because Pennsy scanning does not use IA software, it is not necessary to send a manifest URL in the email. You can simply type out a list of the items.

Furthermore, this staff member will choose one of these items to mark for QA. He/she will send an email to Joel Richard (richardjm@si.edu) including this barcode and indicating that it should be marked in the Pennsy scanning software Macaw as selected for QA (see more on Pennsy QA in the *QAing Items for Pennsy* section, page 43).

The items will be boxed and sent via Inter-Library Mail to:

Attn: Stefaan Hurts

Imaging Center/Pennsy/SILRA

MRC 806

Tel.: 301-238-2239

Post-Scanning Process

Once items are returned from being scanned, there are several post-digitization steps that must be performed.

Check Manifest

If the shipment is being returned from scanning at either FedScan or Pennsy, there will be a manifest returned with the items. Upon receipt of the shipment, confirm that all items listed in the manifest are present, and that there are no additional items included that are not on the manifest.

If there is a discrepancy between the shipment and the manifest, contact either the FedScan scanning center or Stefaan Hurts (hurtss@si.edu) at Pennsy and outline the problem, correcting the manifest as necessary, ensuring that all parties are aware of the problem, and confirming that all problematic books are accounted for.

QA

Once the manifest has been checked (where applicable), a statistical sampling of books from the shipment or scanning batch must be quality reviewed. SIL follows NISO's standards for quality review to determine how many items should be reviewed. Using the chart below, determine how many items should be QAed from the FedScan shipment or the batch of scanned items from the Scribe.

QA for items scanned at Pennsy follow a different workflow. These items are QAed on SIL's scanning software, Macaw. See section below on QAing Pennsy material, page 43.

Items in Scanning Batch	9-15	16-25	26-50	51-90	91-150	151-280	281-500
Number of Items to QA	3	5	8	13	20	32	50
Number of Errors to Fail the Scanning Batch	1	1	1	2	3	4	5

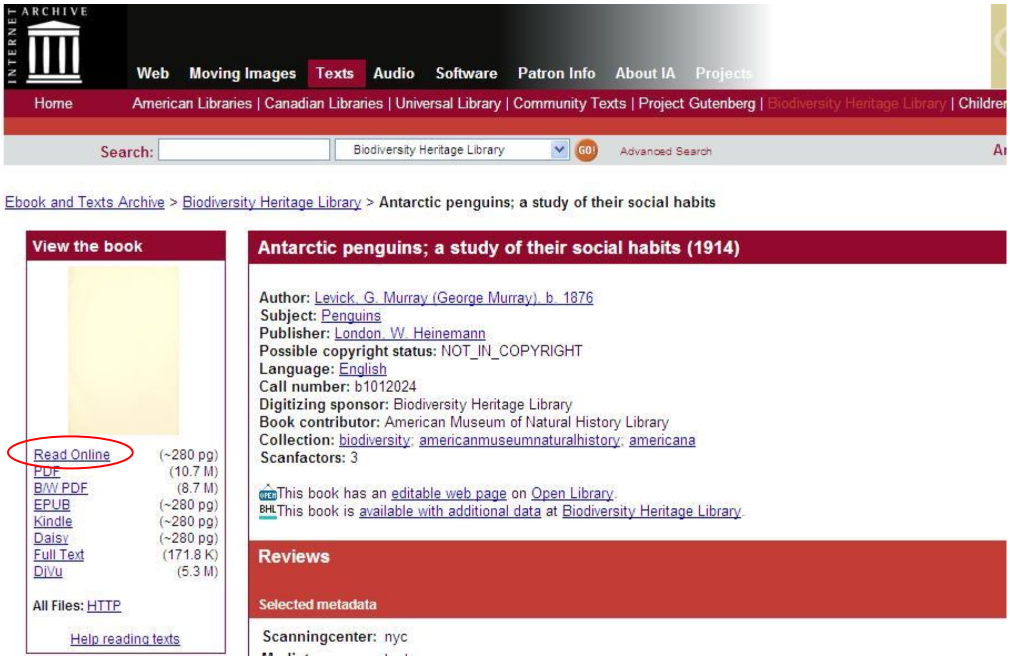
QA is done on the Internet Archive website at http://archive.org. To find the book in the Internet Archive, use the search box on the main page. You can either search by the title of the item, or if you know the Internet Archive identifier, you may search by this to directly bring up the book. The identifier will be included in the slip inserted into the books returned from FedScan or scanned on the Scribe. Once you have located the item, you must perform a metadata and scan check.

Metadata Check

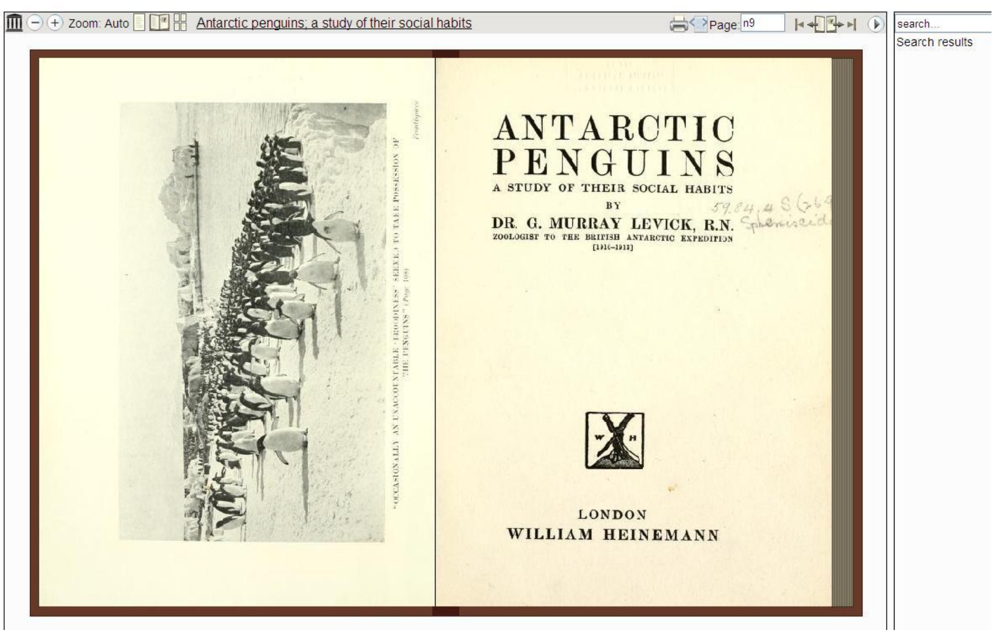
First, confirm that the metadata on Internet Archive reflects the item in hand. If the metadata is wrong, notify the scanning center and they should be able to fix the problem. If QA is being done on material that was scanned more than a month ago, metadata should be corrected by hand in the BHL portal via the editing tool as well.

Scan Check

Checking the scans is simply a matter of checking each page of the physical book while clicking along with the Internet Archive flip-book. You may access the flip book by clicking on "Read Online" on the item's main page.



(Read Online to access the flipbook on Internet Archive for QA)



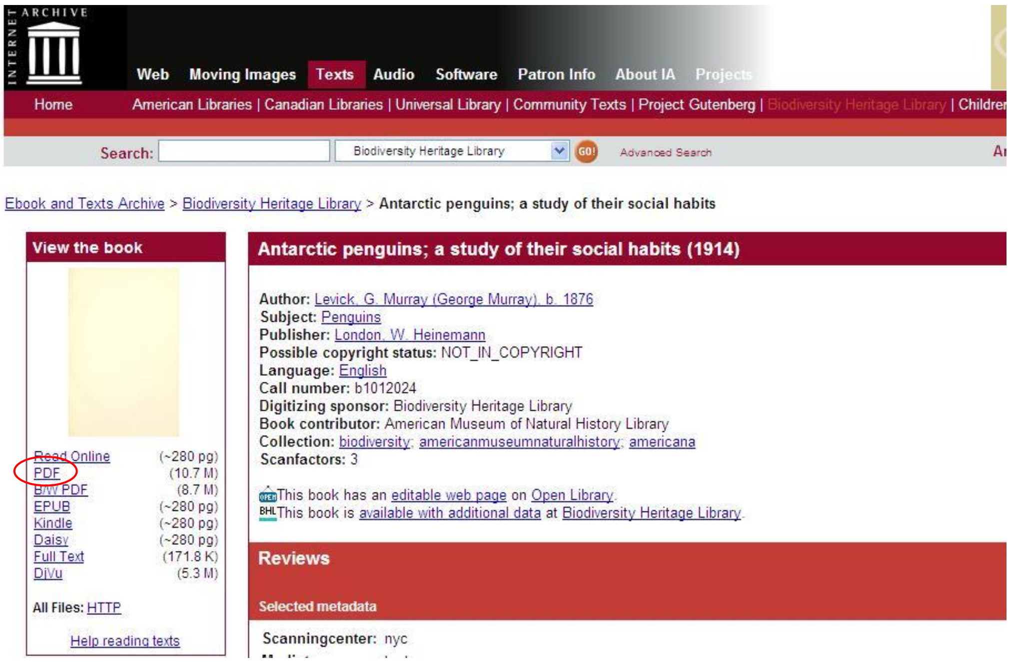
(The flipbook on Internet Archive)

Perform QA by clicking through the page images on IA while turning the physical pages of the book at the same time. Be watchful for: missing pages (pages skipped when the item was scanned), readable text, text that has been cut off, the scanner's hand turning the page in the shot, or anything that the camera might have caught that obscures the text.

DO NOT depend on pagination. Page numbers often lie or hide missing plates within otherwise numerically correct spans.

For any pages that seem too light, off-color, etc. download and check those pages in the PDF. Rarely, it does happen that pages missing or pages that seem too light to read on the flip-book will, in fact, be readable and present in the PDF.

You can download a copy of the PDF on IA by clicking on PDF.



(Accessing the PDF on Internet Archive)

Returning QA Failed Items

If any items "fail" QA, they must be returned to IA or the Scribe to be fixed. An item fails QA for the following reasons:

- Missing pages (except missing blank pages)
- Text that is too light to be read by OCR (Always verify this in the PDF. IF you can highlight the text in the PDF, the computer can read it and it is dark enough. If you can't highlight the text, OCR will not be able to "read" the text and the item must be sent back for scanning.)
- Missing, 'chopped off,' or otherwise obscured text, figures, graphs or plates *if it is part of the intellectual content of the book itself* (SIL does not send back books where the ads have been cropped).
- Indication of scanner "presence," i.e. scanner hand present in scan
- Blurry text that cannot be "read" by OCR (again, check the PDF to confirm)
- Foldouts still folded (i.e. not opened and scanned properly)
- Plates spanning the gutter but not scanned as a foldout

To return an item to Internet Archive, insert a slip of paper explaining the QA problem in the book at the problematic location. In the picklist, check the "rescan" box for the book and indicate the QA problem in the notes field. Take the book to the scanning room and, if it was scanned at FedScan, place it in the staging area to be returned in the next shipment. Be sure to include a list of items being sent back for rescan in the shipment email (see Shipment section for more information on building and sending a shipment to FedScan, page 37). Note that when the item is returned for rescanning at FedScan, it will be given a new packinglist date in the picklist record when it is resent and a new manifest return date when it comes back rescanned. Thus, you should capture the original packinglist date and manifest return date in the notes field for this record.

If the book was scanned on the Scribe, return it to the Scribe scanner, indicating the issue to them in person if possible.

Batch Fail for FedScan

If more than 2% of a shipment from FedScan fails QA (See "number of errors to fail the batch" row in chart above, page 40), return the entire FedScan shipment containing these items to FedScan, requesting that they perform 100% QA on the shipment themselves and correct any discovered errors.

QAing Items from Pennsy

As previously stated, items scanned at Pennsy do not use IA's scanning software, but instead a software created by SIL Web Developer, Joel Richard (richardjm@si.edu) called Macaw. Once items have been scanned and approved in Macaw, they are uploaded to IA to be ingested into BHL. Normally, once the Pennsy scanner has scanned and paginated an item, he marks it as "complete" and it is queued for upload to IA. However, those items that an SIL staff member previously indicated should be "selected for QA" via an email to Joel Richard (see *Preparing Shipment: Pennsy* section, page 39) will only upload to IA once an appointed SIL staff member has QAed them and marked them as "complete."

Once those items that were selected for QA at Pennsy are marked as "complete" by the Pennsy scanner, an email is sent to an appointed SIL staff member informing him or her that the item is ready for QA. Once this staff member receives the item back from Pennsy, they will log into Macaw, access the item, QA it, and, if all is well, mark it as complete. They will follow the same guidelines indicated above as QA standards. Once this staff member marks the item as complete in Macaw, it will be uploaded to IA, after which it can be ingested into BHL.

(For more information on Macaw and how to navigate through and locate items in it, see the Macaw user manual/Appendix B).

If the item fails QA, it will be sent back to the Pennsy scanner in the next Pennsy shipment, and the shipment email will include information on why the item failed QA.

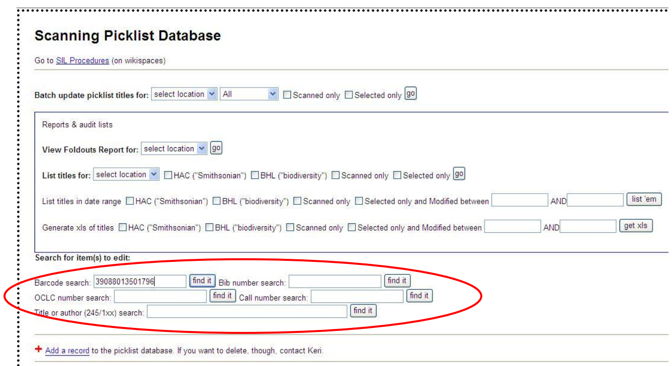
If the book passes QA, this Pennsy item, as well as all other items received back from Pennsy, will then be processed via the following steps.

Picklist

Once QA is complete, the next step is to update the items as scanned in the picklist.

Access the picklist at http://prism.si.edu/sil/projects/245331/BHL_picklist.cfm. Login if necessary.

For each scanned item, find the record for the item in the picklist. It is easiest to find the item by searching by barcode.

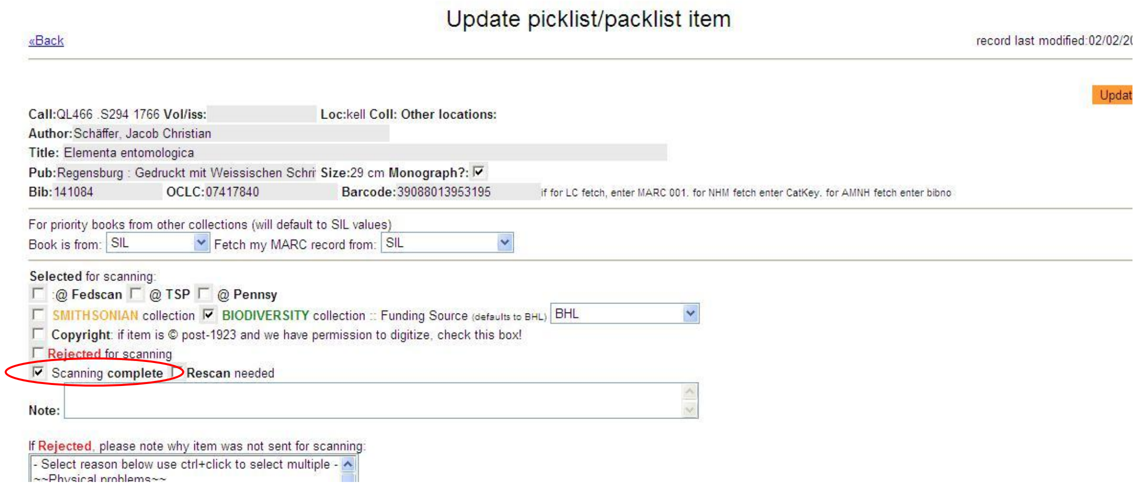


(Finding the item in the picklist)

Click on the correct search result to access the item screen.

(Click on the correct record in the search result list)

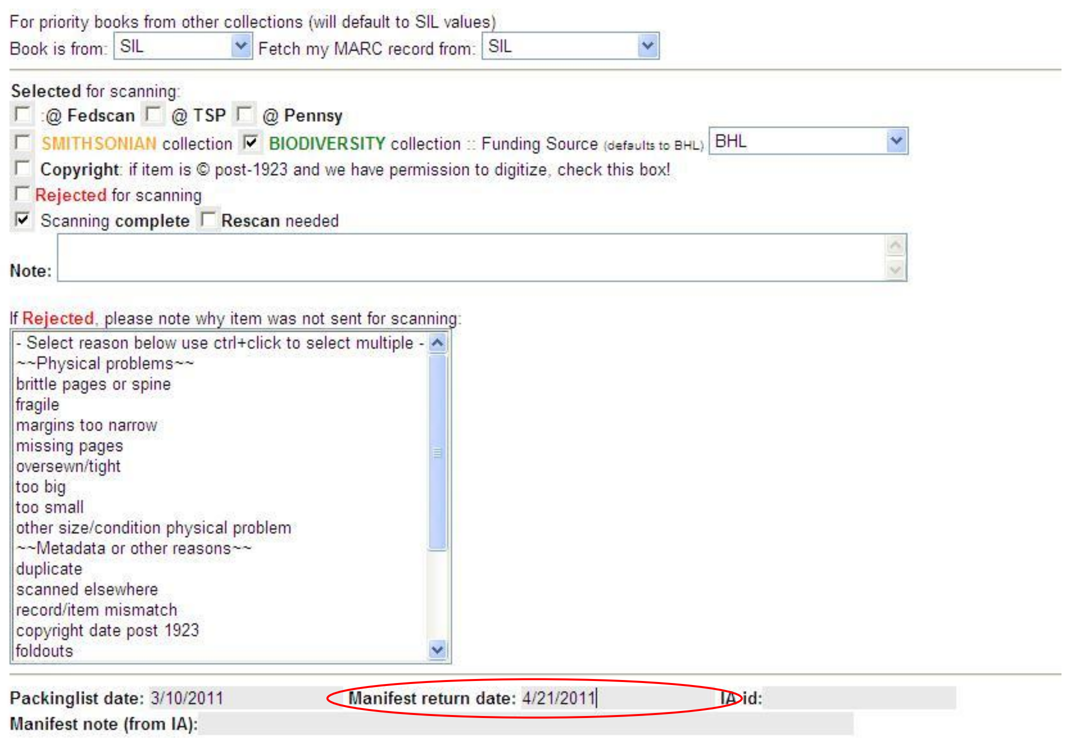
Unclick the location box and click the scanning complete box.



(Marking an item as “Scanning Complete.” Be sure to un-click the FedScan, TSP, or Pennsy box.)

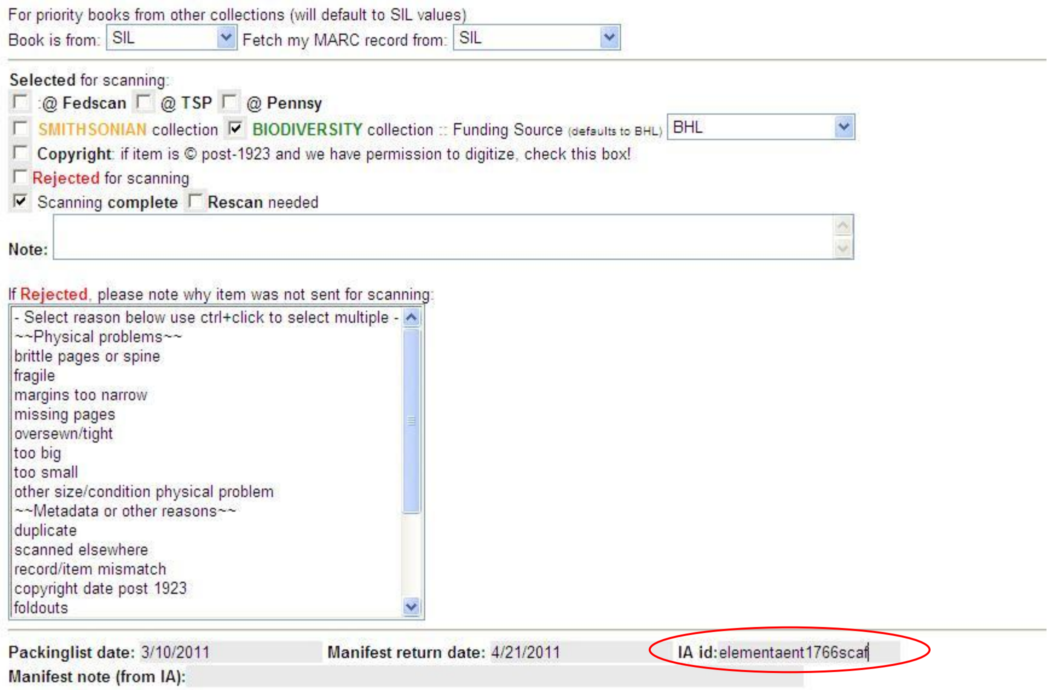
If the item is from an Internet Archive shipment, be sure to put the manifest return date in the appropriate field. If the record already has a manifest return date because it was resent to FedScan for some reason, be sure to capture the original manifest return date in the notes field of the record before entering the new date in the manifest return date field.

If you notice that there is no packinglist date for the record, extrapolate a date from the “record last modified” date for the record (seen in the upper right hand corner of the screen). In other words, see what is listed as the “record last modified” date and determine which date is the closest Thursday to that date. This will most likely represent the shipment for which this record was updated. Place that extrapolated date in the packinglist date field.



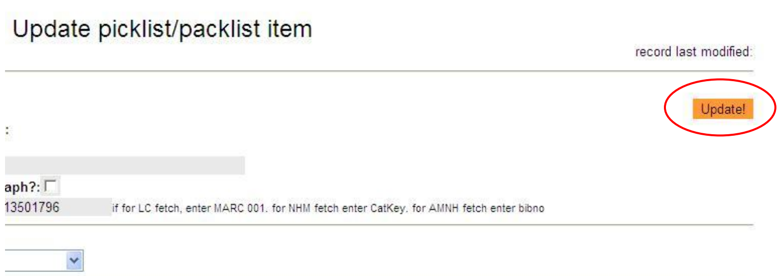
(Enter the Manifest Return Date (the date the shipment with the book was returned) in the appropriate field.)

If the item was scanned at FedScan or on the Scribe, input the Internet Archive identifier in the appropriate text box.



(IA Identifier inserted into IA id field in picklist)

Finally, click update.



(Update)

Repeat this process for all items.

Sticker

To visually indicate to SIL library staff and SIL library users that a book has been scanned for BHL, SIL staff place a small "BHL" sticker beneath the barcode of all scanned items. If the book has an acid-free tag inserted in it, the sticker should be placed on the back of this tag. If the book is in a preservation box, the sticker should be placed in the upper right-hand corner of the back of the box. If the book is in a preservation envelope, the stick should be placed on the envelope, either below the barcode (if the barcode is on the envelope) or in the upper right hand corner of the front of the envelope if the barcode is on the actual book.

Check-in

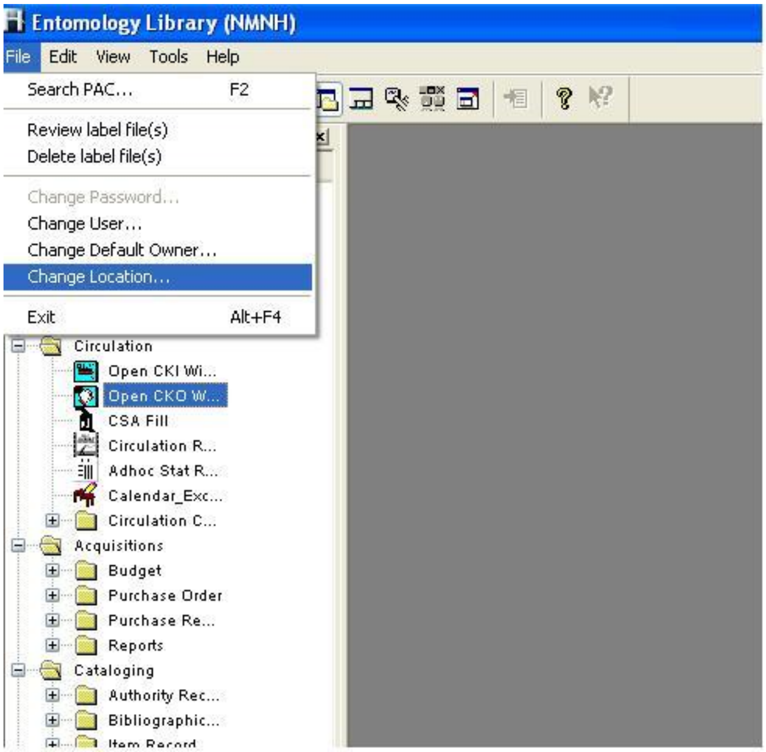
Once all books have been marked as scanned and stickered, they can be checked in via SIL's ILS, Horizon. An important aspect to remember here is that each book is assigned a branch location in Horizon. This branch location is, of course, the branch to which the book belongs and should be returned to. The branch location is printed on the call number tag on the book. Each book must be checked in to the correct branch location in Horizon.

To begin, separate the books you are processing according to their various branch locations.

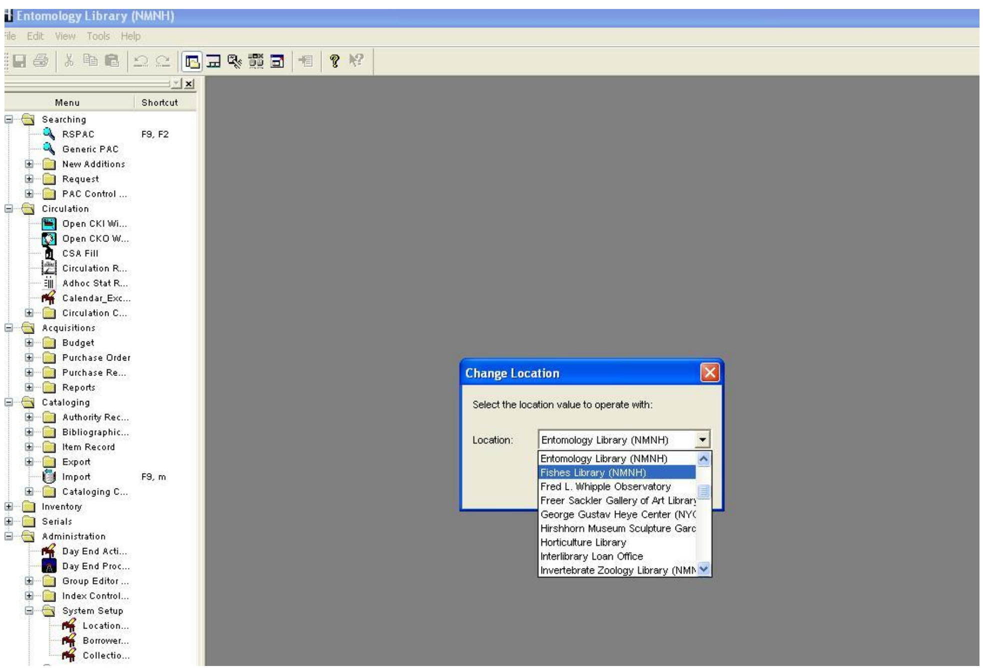
Next, sign into Horizon.

(Sign-in to Horizon)

Once in Horizon, change the indicated location to the location of the first batch of books that you want to check in. To do this, go to File>Change Location. In the pop-up box that appears, choose the correct branch location and hit "OK."

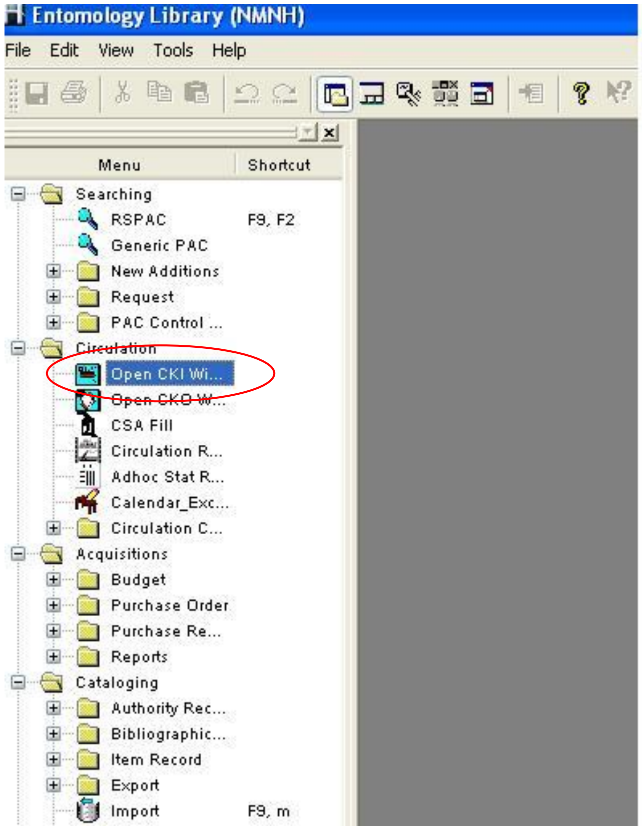


(Access Change Location function)



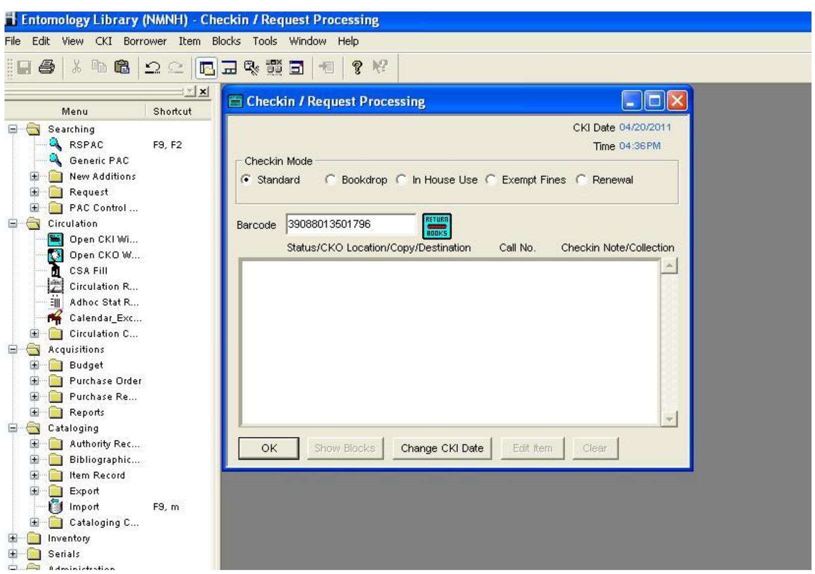
(Choose the correct branch location from the Change Location box)

Once the location is correct, open the Check-In window.



(Link to open Check-In box)

Wand in the barcodes for all items from the location you have set Horizon to.



(Checking-In books)

Once you have checked in all items from this location, repeat the above process to change the location to the next branch for which you have books and proceed with checking them in. Repeat as many times as necessary until all books are checked in.

It is worth noting that some branch locations printed on the call number tag may not be immediately clear as to which branch to check them into in Horizon. If a location on a call number tag has “REF” next to it (for example, NHRef instead of simply NH), you will check that item into the overall branch name listed (in this example NH or Natural History) and not a branch called NHRef, as this branch will not exist in Horizon.

Furthermore, all items listed as “Mollusks” on the call number tag have been modified to a branch location of “Invertebrate Zoology” in Horizon. Thus, if the call number tag says “Mollusks,” check it into “Invertebrate Zoology” in Horizon.

Re-Shelve

Finally, the books are ready to be re-shelved. Be sure that you return each book to the correct branch.

Rare Scanning

SIL also scans items from the Cullman Rare Book Library for BHL. Books are selected for scanning from Cullman by either systematic biodiversity discipline or by Gemini. For more information on these selection processes, see the *Selection* section above (page 3).

Cullman books are scanned at either the Scribe or at Pennsy.

Items that are scanned based on biodiversity discipline are identified by Cullman library staff.

A list of items identified for scanning via Gemini is provided to Cullman Library Staff by an appointed SIL BHL staff member. At the beginning of every month, this SIL BHL staff member will generate a report in Gemini listing all rare scanning requests assigned to SIL during the previous month. He or she will give this list to Cullman Staff so that the items can be fed through the rare scanning process.

Cullman Library staff members are responsible for reviewing the metadata for rare items for correctness. They also coordinate with Book Conservation staff to determine scanning viability based on condition. SIL BHL staff members are not responsible for these steps.

Scribe Rare Scanning

For non-oversized items, SIL BHL staff will retrieve 2-4 rare items each morning from Cullman staff. Following the steps outlined above, they will mark these items as “selected” for scanning at the Scribe in the picklist, ensuring that the volume information is correct. If the items were identified via Gemini, they will also find the issue in Gemini (typically by searching for the title) and leave a note indicating what is being scanned. If this scanning resolves the issue, they will mark the issue as closed and complete.

The items are then given to the Scribe scanner to be scanned. If at any point during the day the books are left unattended in the scanning room, the scanning room door must be locked.

At the end of the day (i.e. before 5pm), an SIL BHL staff member, following the steps outlined above, will mark all items that have been completely scanned as “scanned” in the picklist, place a BHL sticker on the back of the acid-free tag, and return the books to Cullman.

Due to the nature of Cullman scanning, staff do not perform QA on rare items. Staff rely on user feedback submitted via the BHL portal to alert them to any QA problems that need to be corrected for rare items scanned by SIL.

Pennsy Rare Scanning

Cullman items that are oversized (i.e. folio-sized) are scanned at Pennsy. These items are typically identified via Gemini, and a list of these items is given to Cullman staff at the beginning of each month (as described above).

Generally every two weeks, Cullman Staff will put together a shipment of 4-5 Cullman folios to send to Pennsy. They will mark them as selected for Pennsy in the picklist (following the steps outlined above) and send a list of the items both to the Pennsy scanner and an appointed SIL BHL staff member. The SIL BHL staff member will find any Gemini issues associated with these items and update them accordingly.

The Cullman Staff member will box these items up for shipment and coordinate with SIL transportation and the Pennsy scanner for delivery. Upon receipt, the Pennsy scanner will verify that the items in the shipment match the manifest provided by the Cullman staff member. Once the items are scanned, the Pennsy Scanner will mark them as “scanned” in the picklist and place a sticker on the back of the acid-free tag. He or she will then coordinate with Cullman and SIL Transportation staff to return the items. Typically, when a new shipment is received, the previous shipment is returned.

Current Work Appointments

As of April, 2011, pre and post-scanning processing task responsibilities are divided as follows:

Gilbert Borrego:

- Responsible for all post-scanning processing of FedScan and Scribe books, including QA, marking as scanned, stickering, checking-in, and re-shelving.

- Responsible for pulling and pre-scanning processing of titles for FedScan and Scribe as assigned through Gemini or other BHL staff members, prioritizing as necessary

Grace Costantino:

- Responsible for pulling and pre-scanning processing of titles for FedScan and Scribe via issues gleaned from Gemini or other BHL staff members, prioritizing as necessary
- Responsible for all pre-scanning processing of permissions titles, prioritizing as necessary
- Responsible for sending bi-weekly shipments of over-sized , non-rare items for scanning at Pennsy, including all pre-scanning processing required
- Responsible for all pre and post-scanning processing of all non-SIL items scanned at SIL for BHL
- Responsible for all post-scanning processing of non-rare books scanned at Pennsy, including QA, marking as scanned, stickering, checking-in, and re-shelving
- Responsible for supplying lists of user-requested titles for scanning for Cullman Rare Books, coordinating with Cullman staff as to prioritization of titles and scanning location
- Responsible for delegation of Gemini issues to other SIL staff as necessary

Erin Thomas:

- Responsible for all non-BHL pre and post-scanning processing
- Responsible for assembling and managing weekly shipments of books to FedScan, coordinating with FedScan staff to send and receive shipments and prioritize as necessary
- Responsible for overseeing daily scanning of Cullman Rare, non-oversized scanning

Appendix

Appendix A

Table of Contents

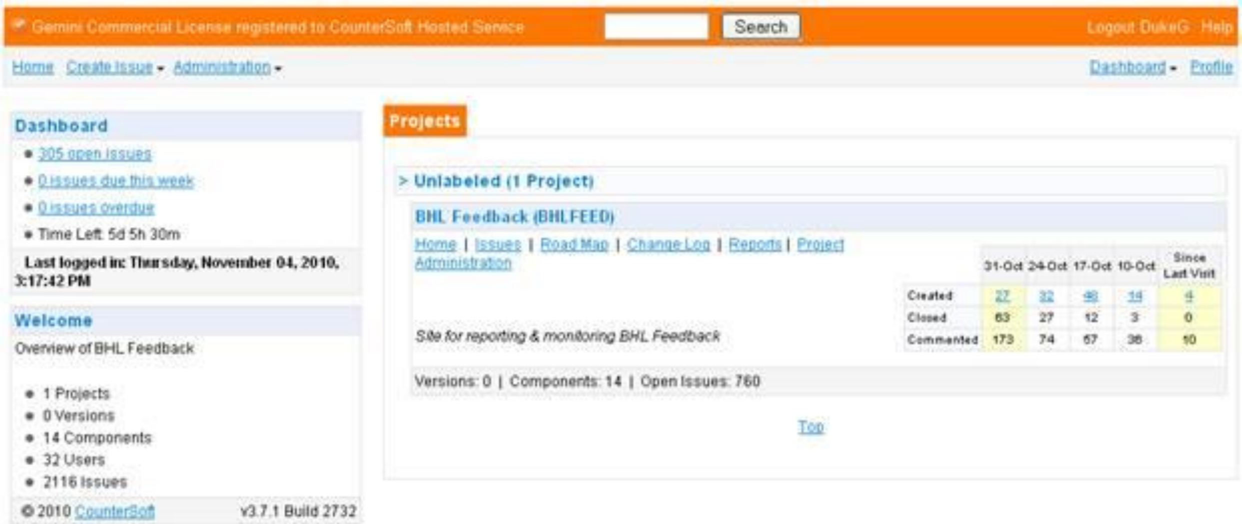
Accessing Gemini

You can access Gemini here: http://biodiversitylibrary.countersoft.net/Default.aspx

You will get this login screen:

Login with your username and password. (If you can't remember your user name and password, contact Bianca (at crowleyb@si.edu) or Grace (at costantinog@si.edu). If you cannot remember your password but can remember your user name, enter your username and click on the "Forgot your Password" option that you see above).

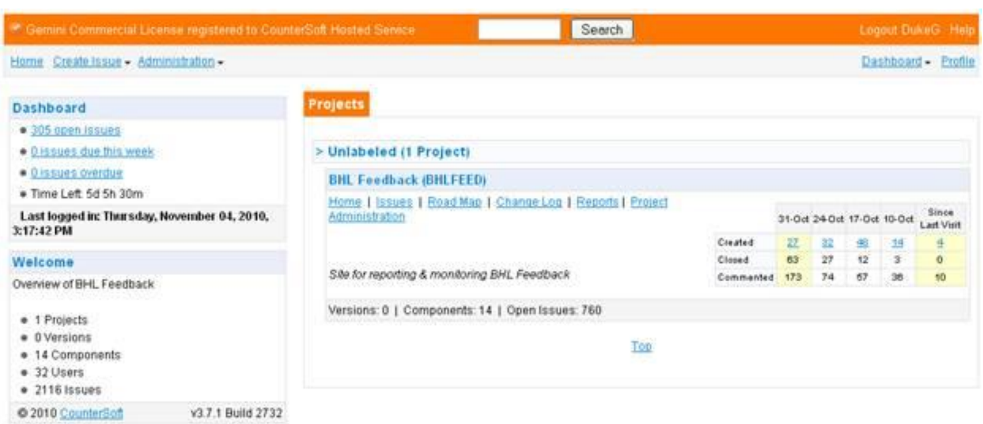
Once you login you will see this screen:



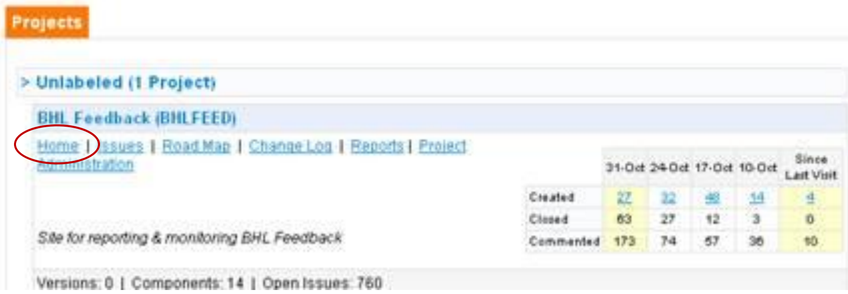
Accessing All Issues Assigned to You

From Project Homepage

If you are on this screen:



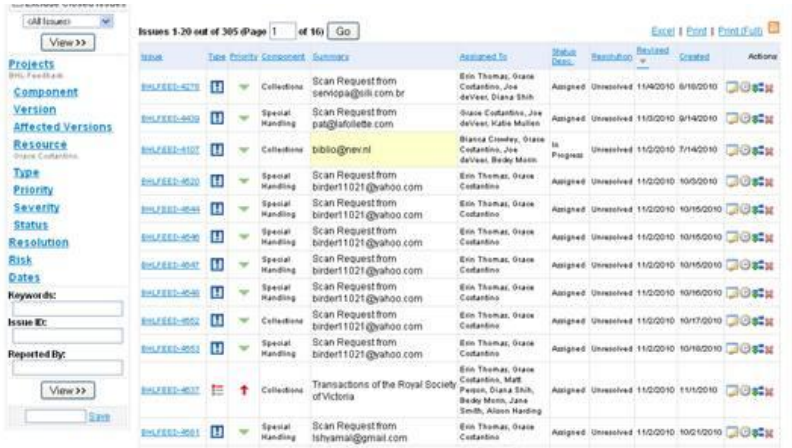
Click on the “Home” button that you see in the “BHL Feedback” box.



You will then be taken to the following screen:

Here you see a column called "Resources." This lists all the people who are assigned to issues in Gemini. If you click on your name in the list, you will get a list of all issues assigned to you.

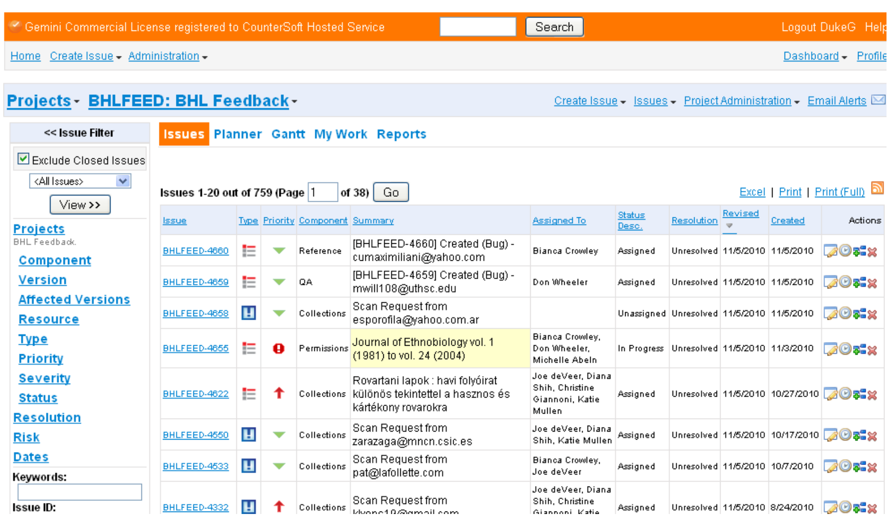
(List of people assigned to issues in Gemini)



(After clicking on a name, you will get this screen, which lists all of the issues assigned to the name you clicked on.)

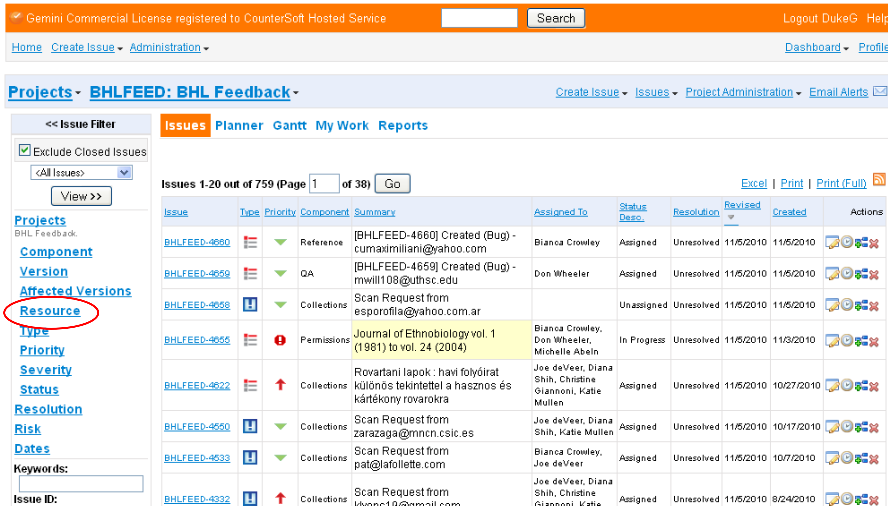
From Issues Page

If, when you access Gemini you are automatically taken to the page listing all issues in Gemini (this occurs if you tell Gemini to “remember” you when you enter your username and password and you do not log-out when you close Gemini in subsequent sessions):



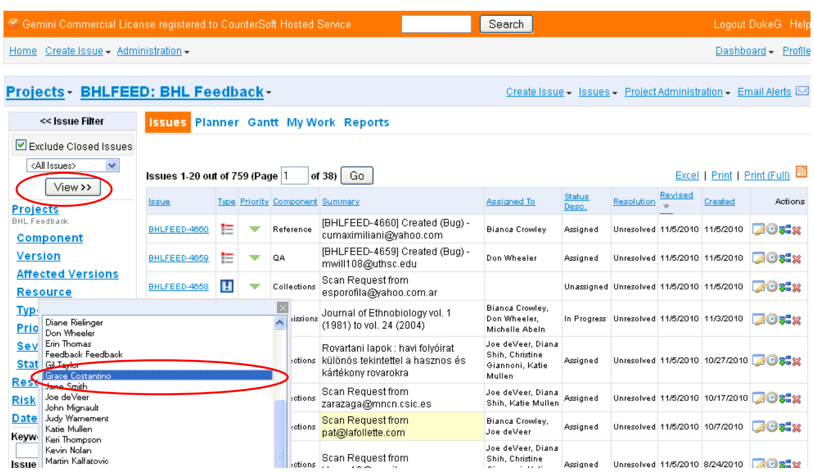
(Issues Homepage in Gemini, listing all issues in Gemini)

Click on the “Resource” link on the left-hand side of the page:



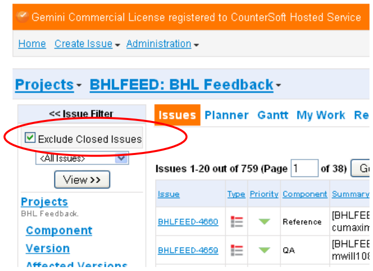
(Resource link on left-hand side)

And in the pop-up box that appears, click on the name that you wish to see all assigned issues for:



(Name for which to see all assigned issues)

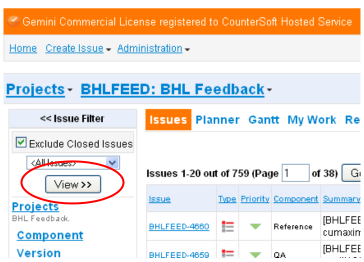
If you want to see only “open” issues assigned to this person (issues that have not yet been resolved), leave the “Exclude Closed Issues” button clicked.



(Exclude Closed Issues Option Box)

If you want to see all issues assigned to this person, including "closed" issues, or those that have already been resolved, unclick the "Exclude Closed Issues" button.

Once you have made your selection and clicked or un-clicked the "Exclude Closed Issues" button, click "View":

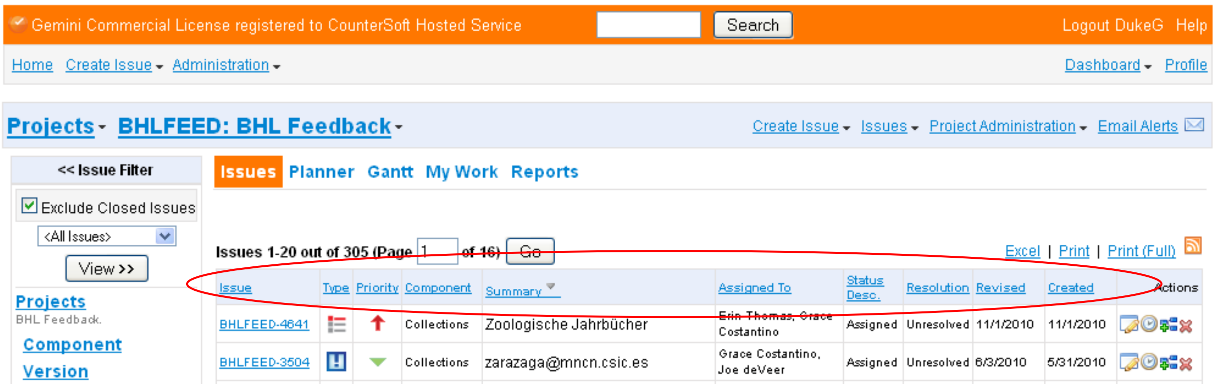


(View Button)

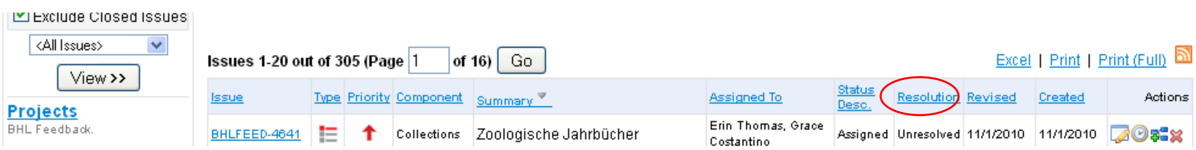
Sorting Issues in Gemini

Once you are viewing issues, there are several categories by which you can sort these issues. You can sort by issue Number, Type (designated when the user submits the issue), Priority, Component (a more specific designation of an issue type, asserted by BHL staff), Summary (the "title" of the issue), Assigned To, Status, Resolution, Revised Date and Created Date.

To sort, simply click on the heading by which you want to sort:



(Simply click on any one of these headers to sort all issues listed by that category. For instance, if you want to sort by Resolution, simply click on the "Resolution" header)



(Click on "Resolution" to sort by the resolution of all of the listed issues)

Once you have made a selection to sort by, you can re-select any other header option to sort by that option instead.

Remember as well to click or unclick the "Exclude Closed Issues" button, depending on whether you want to see closed issues or not.

Priority Sorting

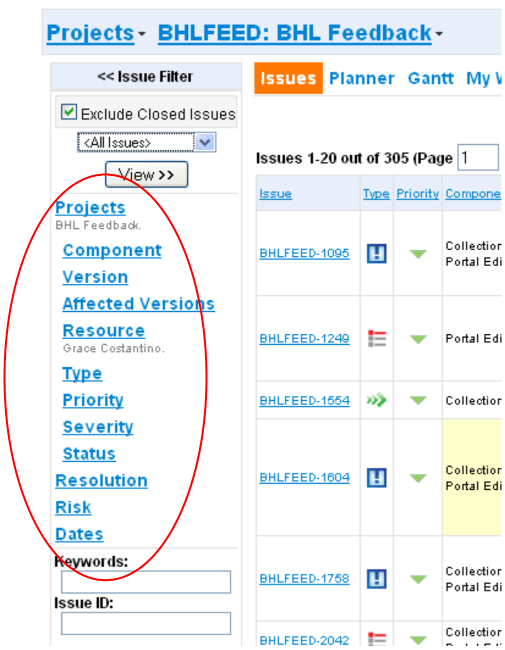
You can also sort the issues listed by their priority. By clicking on the "Priority" header once, you will see the issues listed in the order of lowest to highest priority. Clicking on the "Priority" header option again will list the issues in the order of highest to lowest priority.

(Priority header to sort by Priority status)

Filtering in Gemini

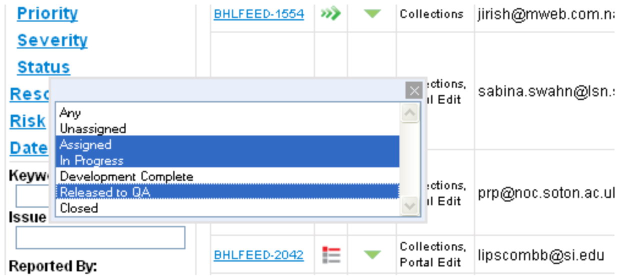
You can filter issues in Gemini to see only those issues matching certain requirements. The most important requirements to filter by in Gemini are issue Component (staff-designated type of issue), Resource (who is assigned to the issue), Priority, Status, Resolution, and Date.

To filter by any of the above requirements, simply click on the text for your choice listed on the left-hand side of the Issues Page in Gemini:



(Left-Hand panel listing options by which you can filter)

Clicking on any one of these options will bring up a pop-up box with the various options under that category by which you can filter. You can click on multiple options in each pop-up box by holding down the “Crtl” button when clicking on your choices. Then click the “View” button.



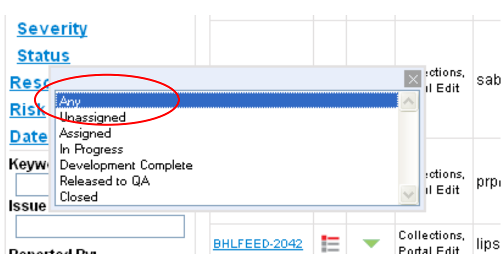
(Pop-Up box activated by clicking on the "Status" link. Multiple options selected by holding down the "Ctrl" button while clicking on choices)

When you select multiple options, Gemini reads this as an "or" command, not an "and" command, meaning that Gemini will return all results that have *any* of the selected options, not *only all* of the selected options.

So, if you were filtering by who was assigned to an issue, and you wanted to see all of the issues assigned to three different people, you would click on the "Resource" link and in the pop-up box click on all three names you want to see. However, Gemini would return all issues with any of those names in them, not only those issues with *only those three* people assigned to them. So, you would also receive a list of issues assigned to only one of those people, two of those people, and those assigned to all three of them.

Remember as well to click or unclick the "Exclude Closed Issues" button, depending on whether you want to see closed issues or not.

To undo any filtering choices, simply click on that header on the left-hand side and in the pop-up box click on the "any" option. Then click the "View" button.

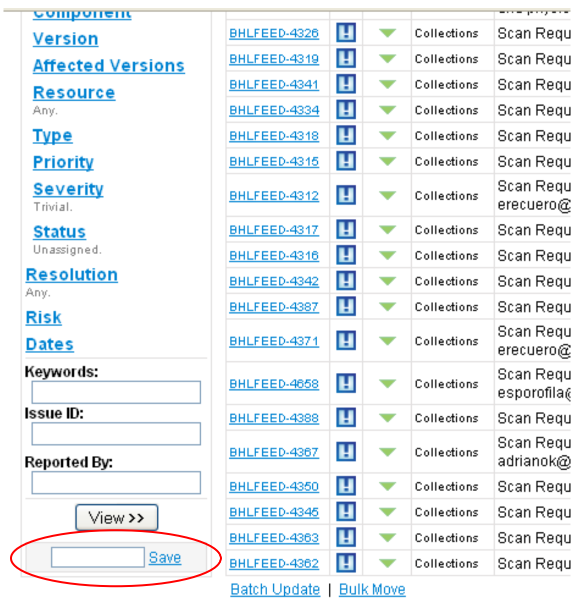


("Any" option to un-do a filter choice)

Saving Filters

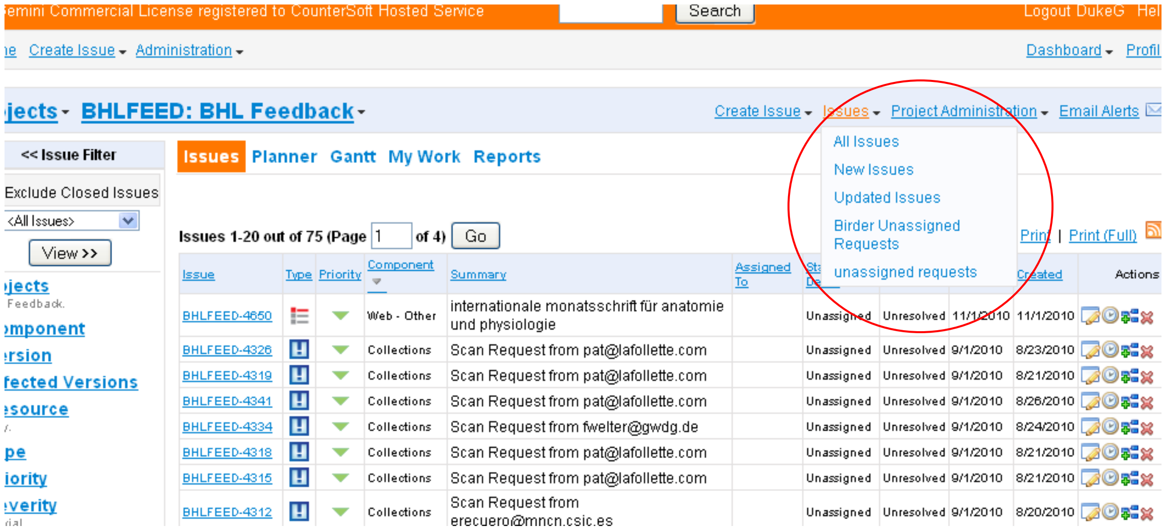
If you have a certain filter that you want to access regularly (such as you regularly want to access all issues assigned to you that are still listed as "Assigned" or "In Progress"), you can save your filter for future use.

To begin, enter the various filter criteria that you want to see (in this case, Resource = your name, Status = Assigned [and] In Progress). Then, scroll down to the bottom of the screen and on the left-hand side you will see a Text Box with "Save" next to it. Choose a name for your filter and hit save.



(Box by which to name and save your filter)

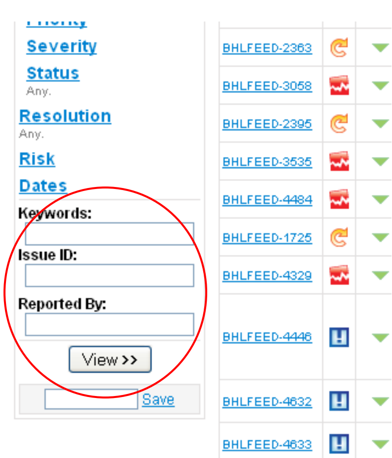
You can then access this filter with one click by going to the "Issues" drop down box at the top of the screen and finding the name you designated for this filter and clicking on it.



(Issues drop down box in which your filter will be saved for all subsequent uses)

Searching in Gemini

You can also search Gemini by a Keyword, Issue ID Number, or Who Reported (or submitted) an issue. To do this, go to the main page listing all issues in Gemini. In the lower left-hand side of the page, you will see three text boxes that allow you to enter criteria. Simply enter your criteria and hit “View” to search.

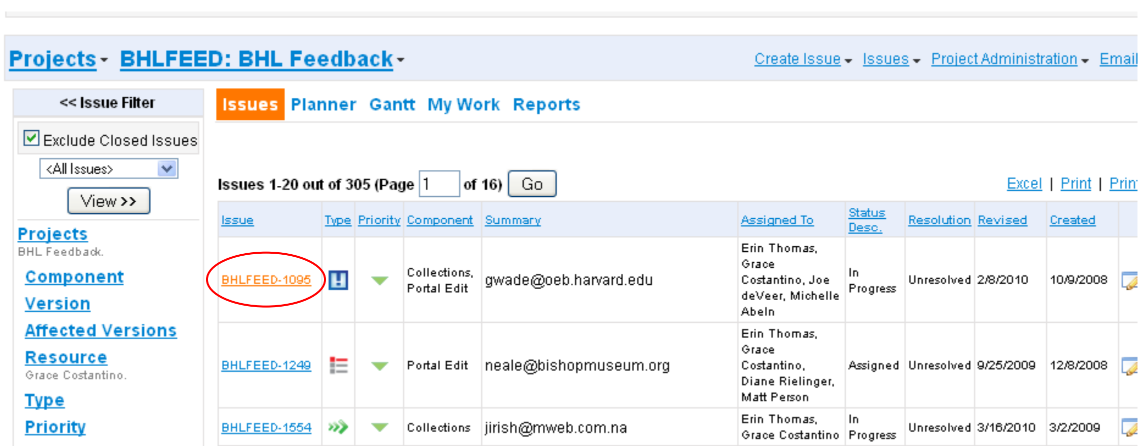


(Text Boxes by which to Search)

Entering search terms will search only the issues you have displaying in the list of issues at that time. This means that, if you have filtered the issues by a certain status or resource, and then subsequently enter search terms, Gemini will only search those issues matching your filter criteria for the entered terms. To search all issues, not just those from your filtered list, first un-do your filter by choosing the "Any" option instead of your earlier-designated criteria for each attribute, hit view, and then enter your search terms. Remember as well to click or unclick the "Exclude Closed Issues" button, depending on whether you want to see closed issues or not.

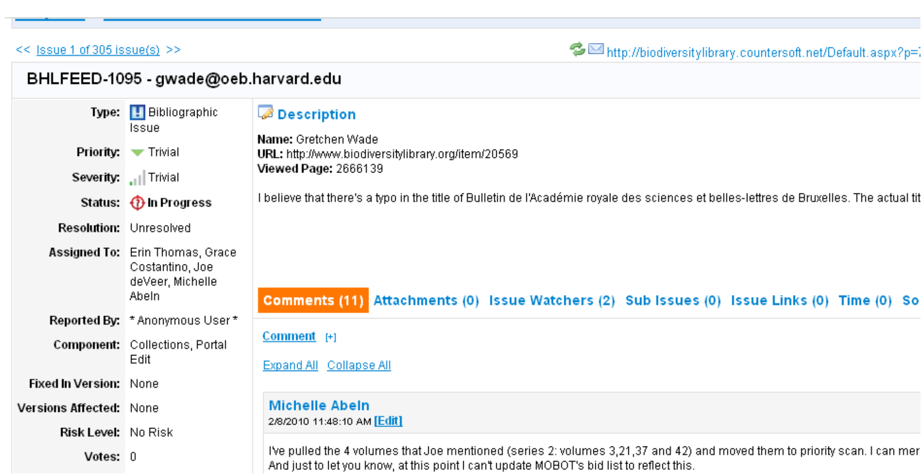
Updating Issues in Gemini

To open an issue and then update various components in the issue, begin by clicking on the BHL Issue Number Link:



(BHL Issue Number link to open an issue)

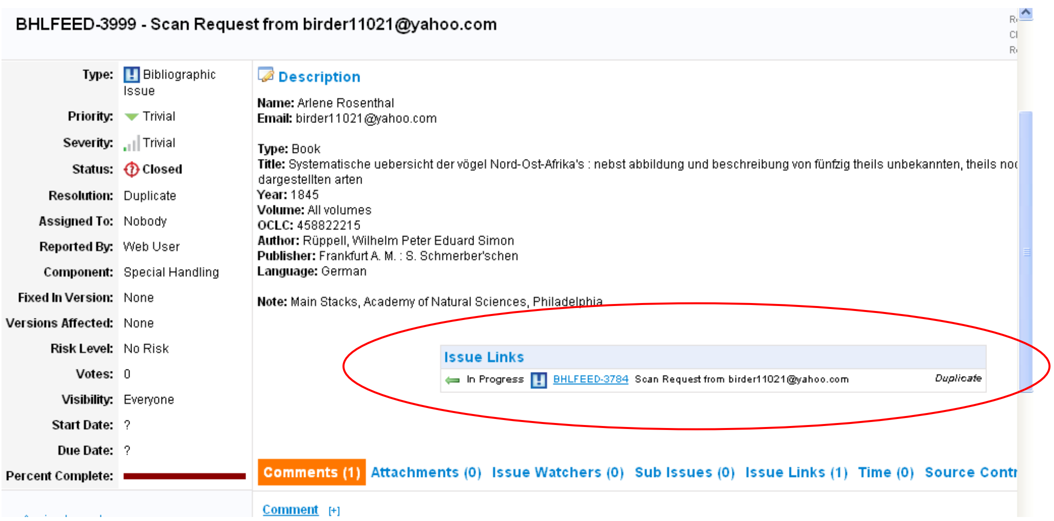
When you open an issue, you will see the following screen:



You will be able to see all communication that has occurred concerning this issue listed under the comments link in order of most recently to least recently added comment.

On the left hand side of the issue screen, you see the different category designations asserted for this issue, such as its priority, status, resolution, who is assigned to it, who reported it, and its component.

The other aspect of an issue that is commonly used in BHL is the Issue Links options. Related or duplicate issues are linked in Gemini to try to keep all communication about a particular title or volume in one place. You can see any linked issues to an issue you are on in the middle of the issue's page. Simply clicking on the Gemini Issue Number in the link box will take you to that issue in Gemini.



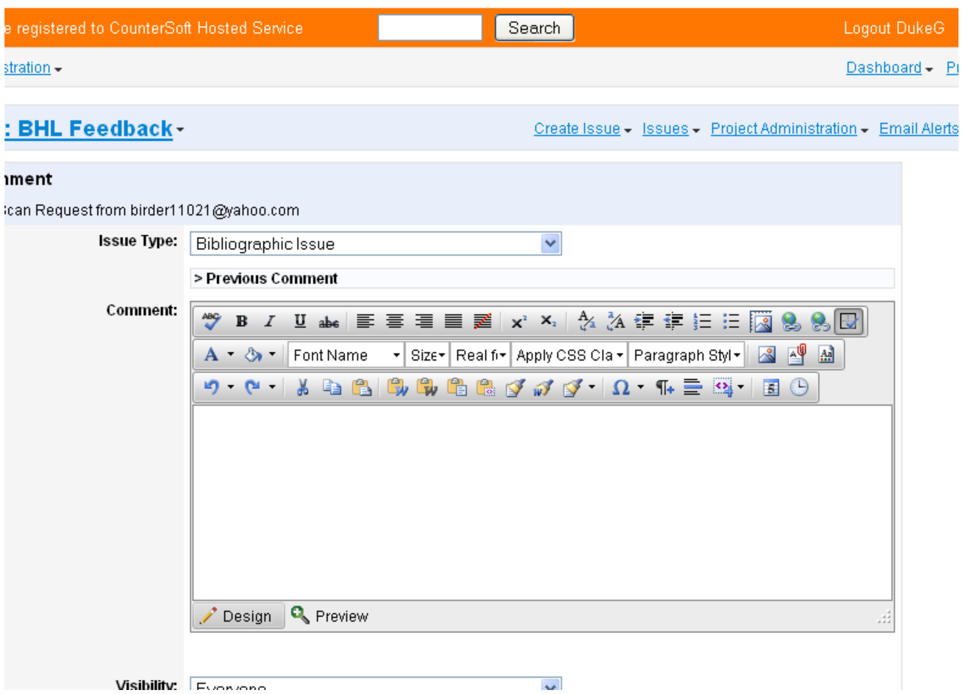
(Issue linked to this issue. Clicking on the Gemini issue number – seen above in blue – will open that issue)

Adding Comments

To add a comment to an issue in Gemini, make sure you are on the "Comments" tab and click on the "Comments" link.

(Comments tab and Comments link)

Once you click on the link, you will get the following screen by which you can enter a comment in the available text box:



(Text box by which to add a comment)

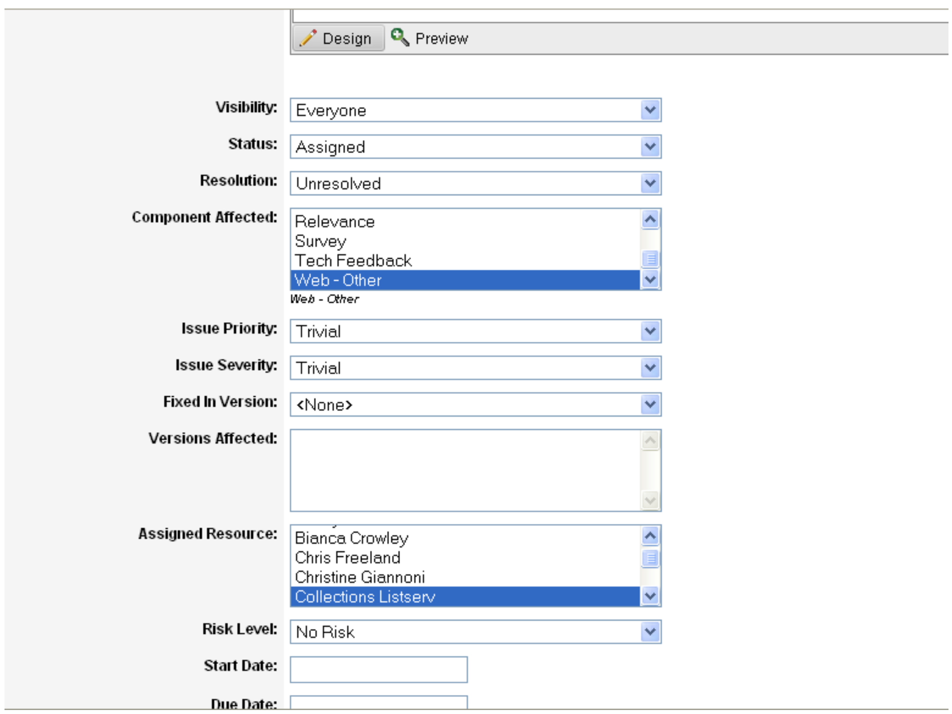
You will notice that you can also update other aspects of the issue on this screen. This will be covered in the next section. Once you have added your comment, scroll down to the bottom of the screen and hit “Create.” You can also “Cancel” your comment if you decide you do not want to add one after all.

Once you hit create, you will be returned to the main screen for this issue, and you will see your comment listed with the other comments.

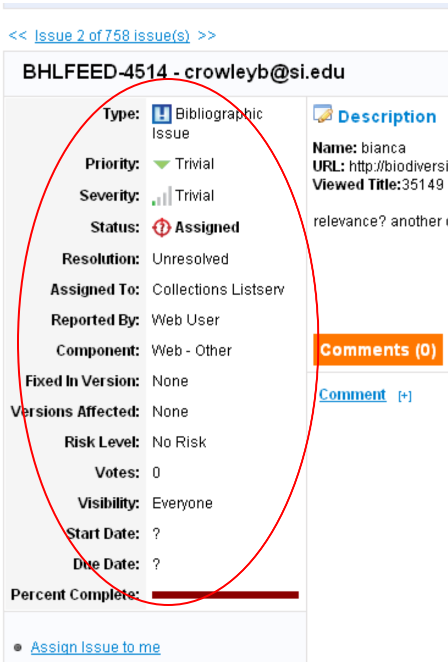
Updating Other Aspects of an Issue

You can update the various other aspects of an issue in two ways. You can either make these changes on the “Comment” screen discussed above, or you can make them on the main screen for this issue itself.

On the comment screen, simply select the options from the drop-down boxes available that you desire for the various categories offered before you hit “Create” to publish your comment.

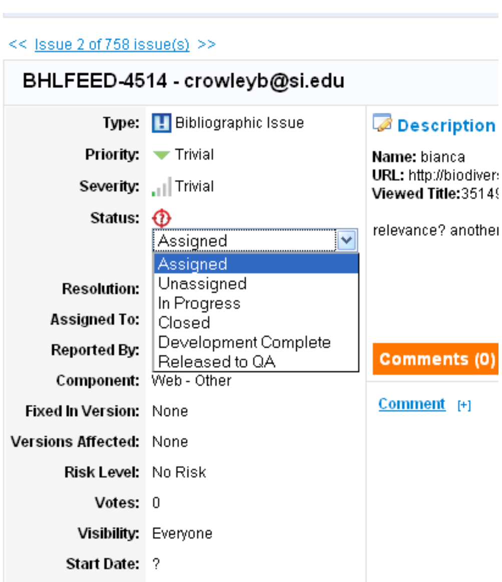


On the issue screen, the left-hand side of the page lists the various attributes assigned to that issue.



(Attributes assigned to issues)

Any of these attributes, are clickable. Selecting an attribute generates a drop-down box listing all of the various options you can change. Simply choose your desired option and make sure to save by clicking on the green check mark that appears.



(Drop down box from which to select an attribute)

Once selected, you will see a green check mark appear below the option. Click on that to save your choice.

(Green Check Mark)

Adding Issue Links

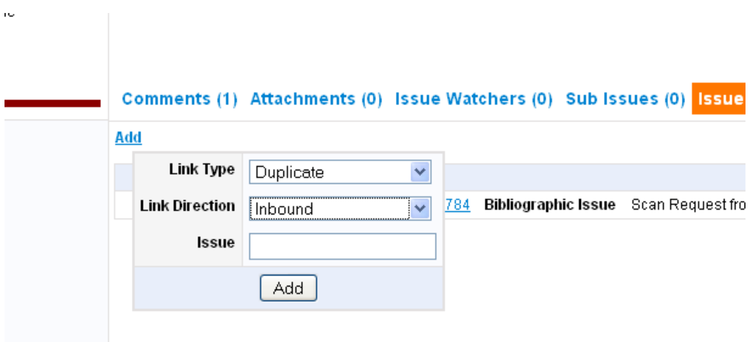
To add any issue links, first record the issue number(s) that you would like to link to the issue you are on. Click on the “issue links” header you see in the middle of the page.

(“Issue Links” header)

You will see the option to “Add” pop-up. Click on that:

(Option to "Add" an issue link)

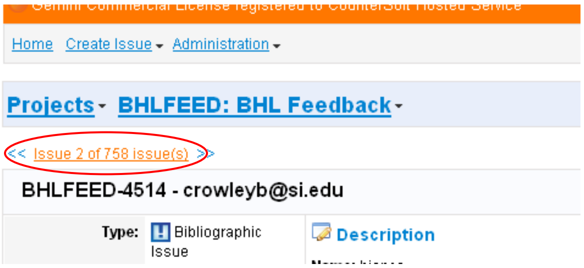
You will then have the option to choose what type of link it is (Duplicate, Grouped, Related) and the link direction (In-Bound or Out-Bound). The link type defaults to "Duplicate" so please make sure to modify the link type if it is not, in fact, a duplicate issue. Duplicate issues are typically closed and ignored. In-Bound or Out-Bound direction does not matter. To link the issues, enter the issue number that you want to link to the issue you are on.



(Pop-up box to designate specifics of the issue you want to link)

Returning to List of Issues

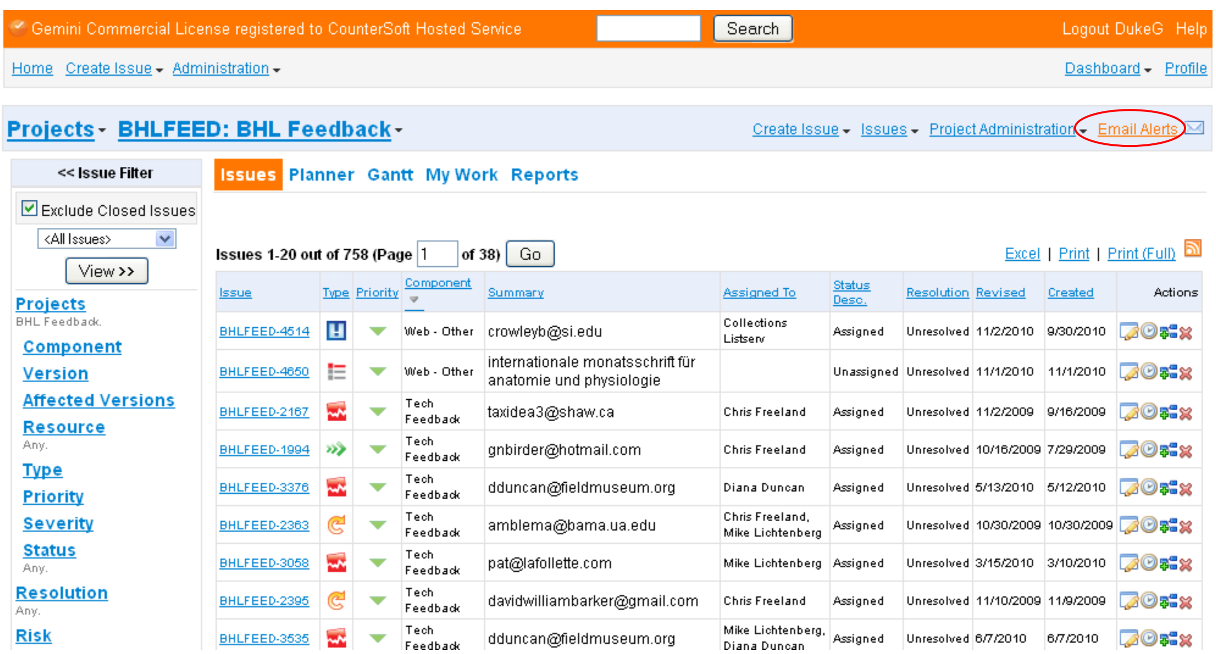
If you want to return to the main page listing all issues in Gemini, or the filtered list of issues you've selected, from an individual issue screen, click on the "Issue X of X Issue(s)" link at the top of the page. (This may also be called "Back to Issue Filter" depending on the various options you have selected).



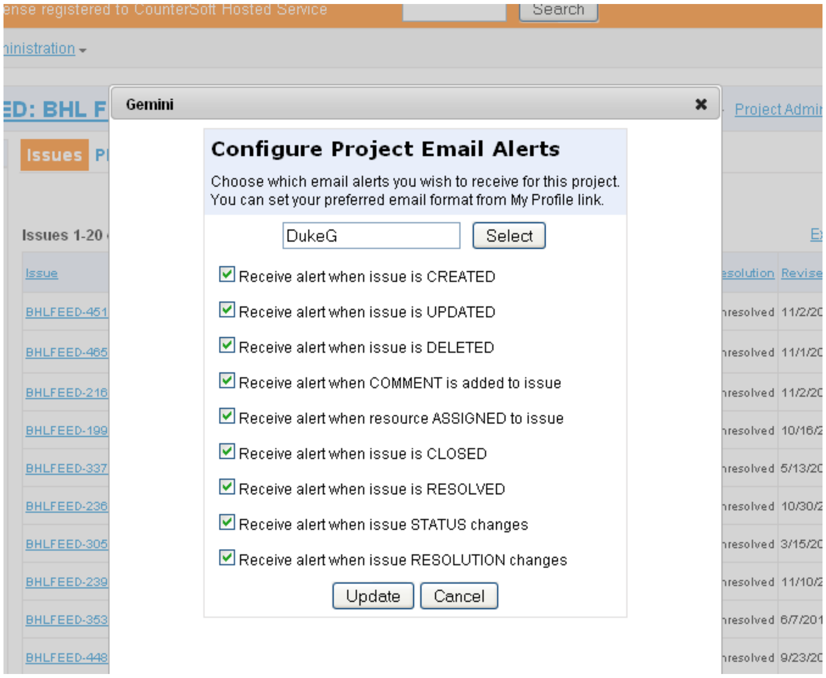
(To return to list of issues)

Email Alerts in Gemini

Gemini is set up to allow people to receive email notifications about certain aspects of Gemini. You can designate the types of things you want to receive email notifications about in Gemini through the "Email Alerts" link. Click on this link and select which of the given options you want to receive email notifications for.



(Email Alerts link on main page in Gemini)

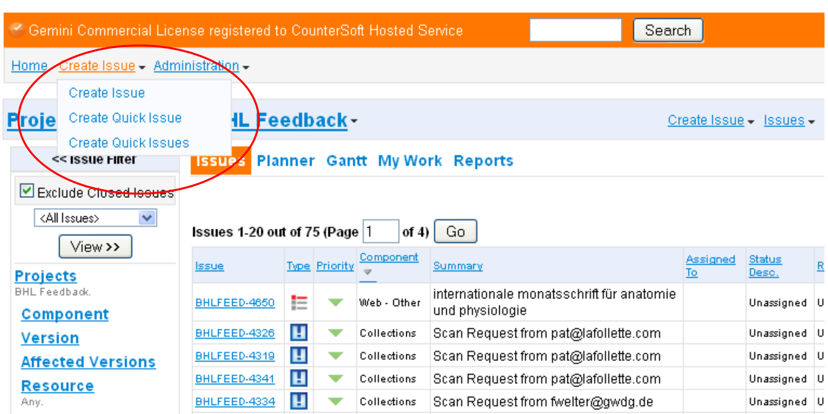


(Box from which to choose what you want to receive email notifications from Gemini about)

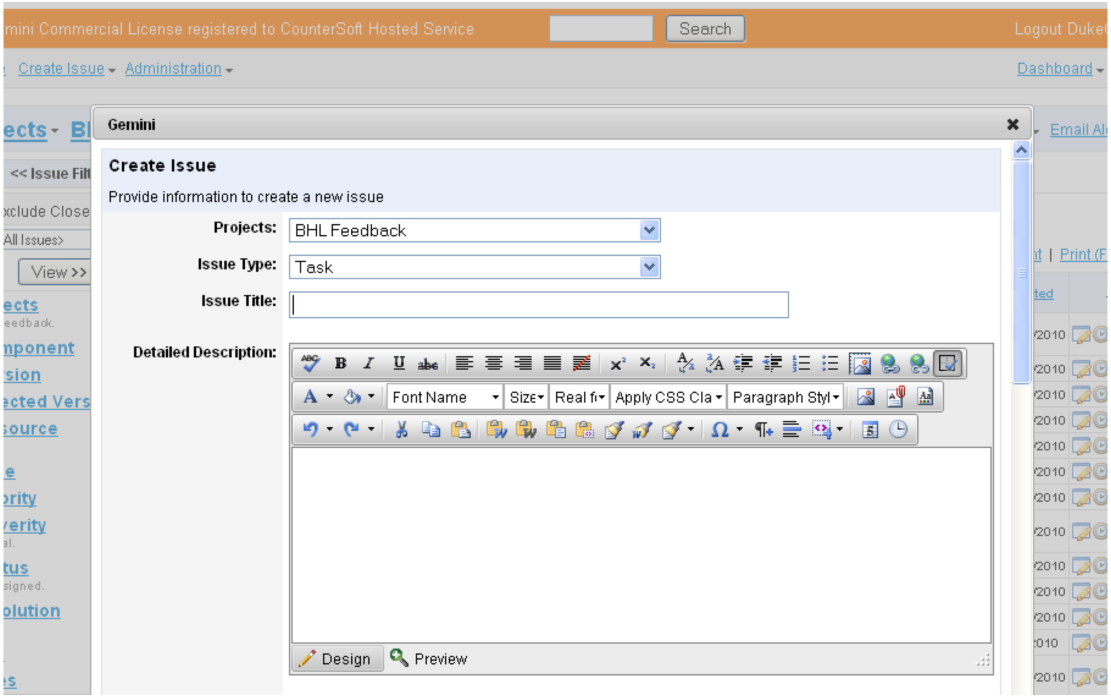
Hit "Update" to save your settings.

Creating Issues in Gemini

To create an issue in Gemini, go to the "Create Issue" option at the top of the screen, left-hand side. In the drop-down box, click on "Create Issue." You will get a pop-up box by which you can create an issue.



(Create Issue Drop Down box)



(Screen by which to create an issue)

Once you enter the issue title, description, select various settings for the available attributes (status, resource, component, etc.), and enter a "Work Estimate" time (you must fill in this space for the issue to be created, but you can just enter 0 since we really do not track estimates of how long an issue will take) click on "Create" and the issue will be created.

Questions?

For questions, please contact:

Bianca Crowley: crowleyb@si.edu

Grace Costantino: costantinog@si.edu

Glossary

Component = Type of issue as designated by BHL staff (ex. QA, Collections, PDF, etc.)

Resource = People assigned to an issue, or people available to be assigned to an issue

Type = Type of issue as designated by users at time of issue submission on BHL

Priority = Relative importance of issue in Gemini, from Show Stopper (highest importance) to Trivial (lowest importance).

Note: priority of Low/Medium/High not used in BHL Gemini

Status = State of an issue thus far (ex. Unassigned, assigned, in progress, etc.)

Resolution = Decision about the status of an issue (ex. Unresolved, won't fix, duplicate, etc.)

Macaw Mini-HOWTO

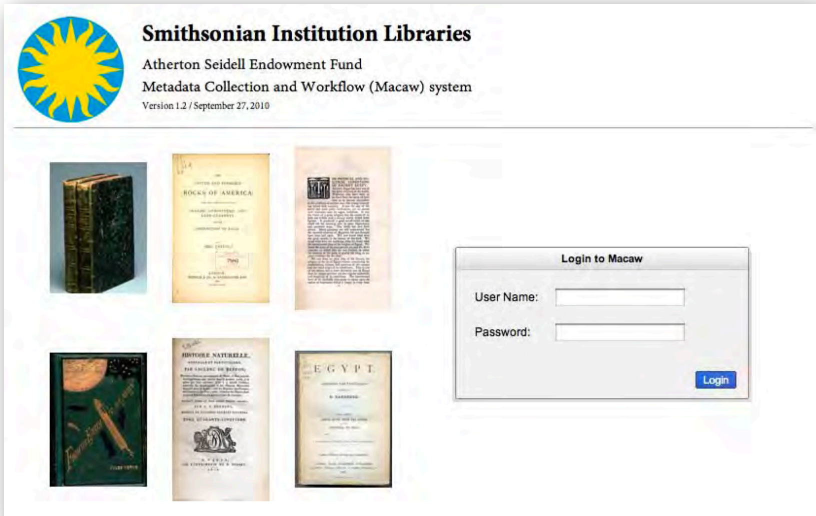
Table of Contents

Introduction

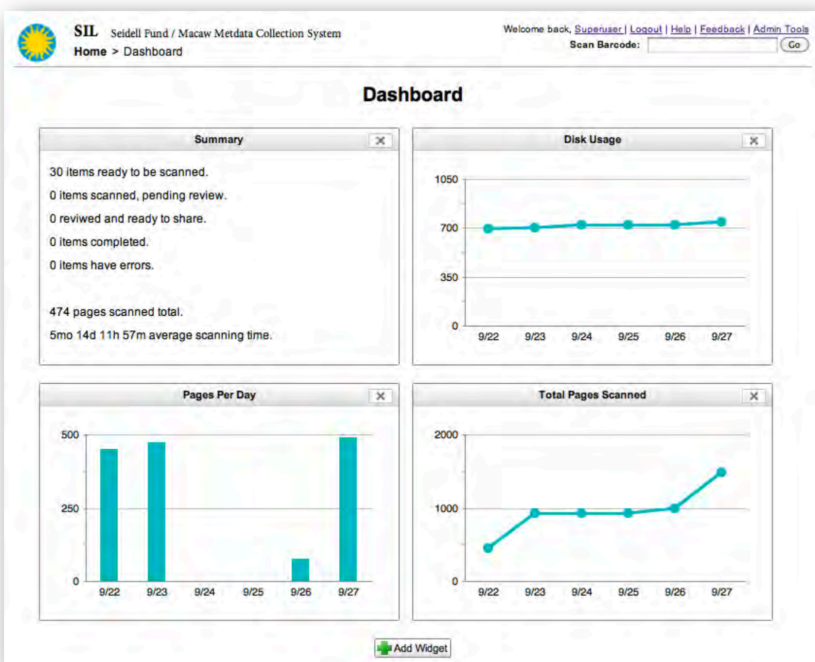
In the Summer of 2010, the Smithsonian Institution Libraries developed a process and software to scan folio volumes, large fold-outs, and other materials not suitable to our existing Scribe digitization workflow. The Macaw tool is the part of this scanning process meant to collect page level metadata and manipulate the scanned pages after capture by the digital camera. The result is a complete digital version of the item ready to be shared with our partners, such as the Biodiversity Heritage Library and the Internet Archive.

Getting Started

First, log in to Macaw with your username and password.

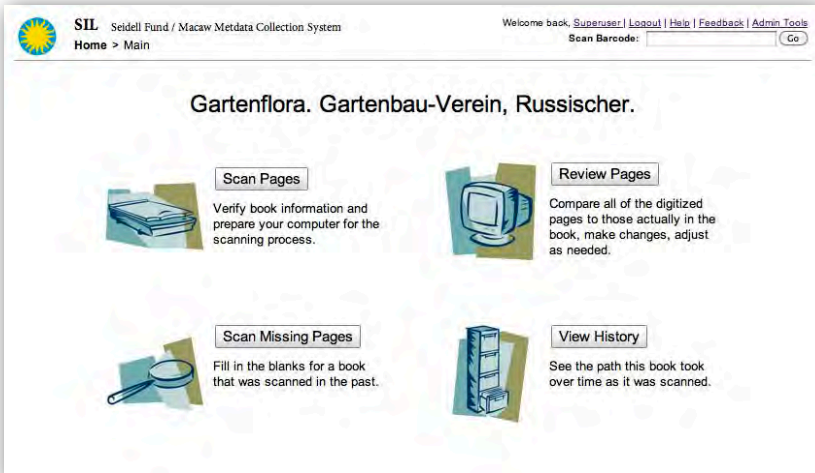


Scan the barcode of the book you are currently working on. If you don't have a barcode scanner, you may also type in the entire barcode and click the “Go” button. As a reminder, Macaw operates on the item, or barcode, level and treats multiple items or volumes in the same title as separate, unrelated items.

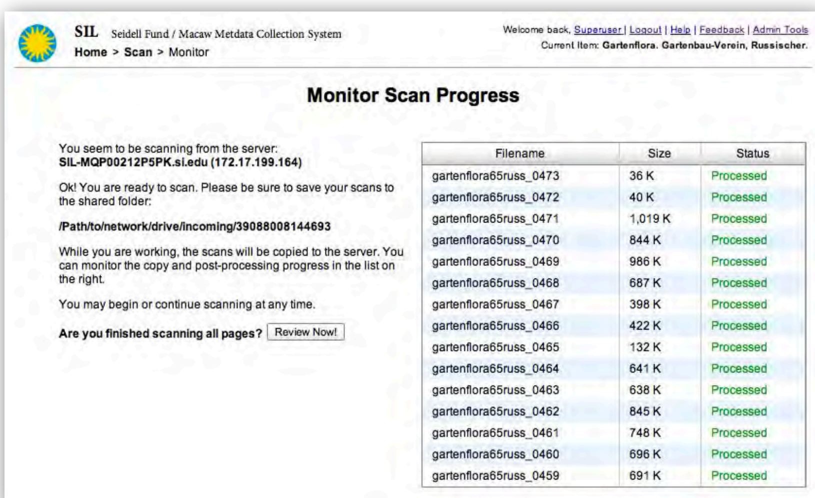


Scanning Pages

Once the barcode is scanned, Macaw loads the book and displays the title at the top of the page, which should match the book you have in your hand. Macaw shows you four options for this book. You should start with "Scan Pages".



This window does not actually monitor the progress of your scanning. Rather it monitors the progress of ingesting the scanned images into Macaw's database.



While you are scanning, or when you are done, you should copy the files into the "incoming" directory. This is a shared folder on the Macaw server. At this time the address is **\\sil-mym0340r1eug\incoming** which you can mount as a shared drive on your computer. Anything you scan must be placed into a folder named with the barcode of the book. This should be created for you automatically, however if it's not there, you may create it. Be absolutely sure that you place the files in the proper folder. It's impossible to remove pages from the Macaw website once they have been added.

While you are scanning pages, Macaw monitors the destination folder for any new scans. When a scan is found, Macaw imports and pre-processes the file. On this page, you can monitor the progress of finding and importing the images.

When you are entirely finished scanning the pages, cover, color cards, white cards, etc of the book, click the "Review Now" button to being reviewing the order of the pages and entering metadata.

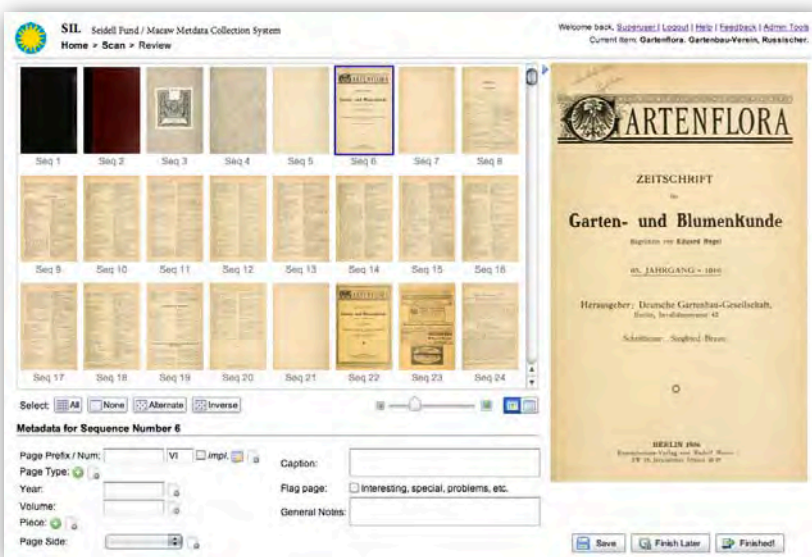
Entering Metadata

The main metadata collection window consists of three areas, a resizable grid or detailed list of thumbnails, a preview image for the selected thumbnail, and the metadata for the selected page(s).

The thumbnails can be resized with the slider tool and you can switch between thumbnail view and list view with the two buttons next to the slider. Any items you have selected will remain selected when switching between the two views.

To select a page to edit, click the thumbnail image (in thumbnail view) or click the row (in list view). You can select more than one page by holding down the ALT key to select individual pages, or by holding the SHIFT key to select a range of images.

Once one or more pages are selected, there are a number of edits that you can make. To begin with, you can edit the page "type" for each page. Page "types" include Appendix, Article Start, Article End, Blank, Cover, Fold out, Illustration, Index, Issue Start, Issue End, Map, Table of



Contents, Text, and Title Page. Others include Tissue, Suppress, Color Card and White Card. The default page type is always Text.

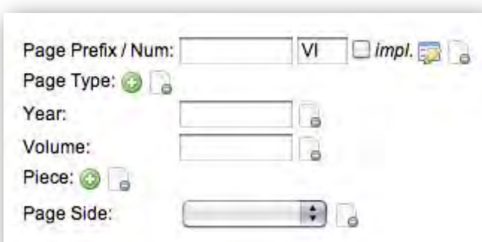
If you wish to select multiple pages at once, there are a couple of options available. You can select all pages by clicking on the "Select All" button underneath the window displaying all pages in the book. If you have several pages selected, and you want to quickly unselect these pages, click the "Select None" button beneath the same window. If you want to select every other page in the book, click the "Select Alternate" button. If you want to select all pages not already selected, click on the "Select Inverse" button. As a reminder, you can hold down the ALT key to select individual pages or the SHIFT key to select all pages between two pages.

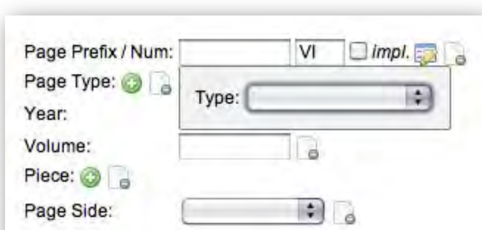
Entering Page Type Metadata

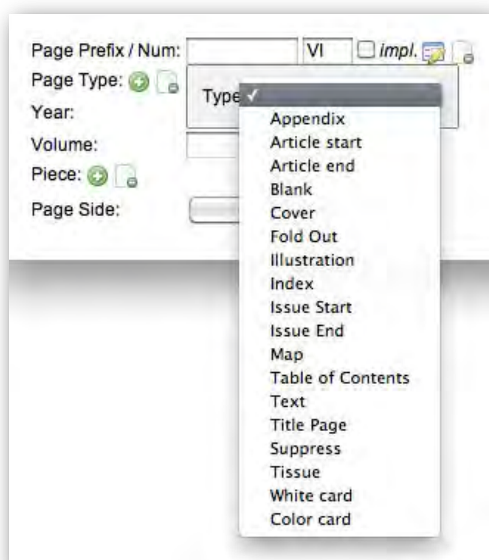
To edit page "type," select the desired page (or pages) to edit, and click on the plus icon next to the label "Page Type". This displays the drop down to select the page type:

Select the page type that you wish to assert the selected pages as. The new page type will be added to the list of page types for the book. To remove a page type, simply click the delete icon next to the undesired page type. The icon will turn red when your mouse is over it.

A couple of notes to keep in mind: if the page you are paginating is a numbered page within the text of the book, but also contains an illustration of some type (a plate, figure, etc.), you should designate this page as both "text" and "illustration" page types.







To delete a page type, simply click the round cancel icon next to the name of the page type. The icon will turn red when you place your mouse over it to indicate that it's going to be deleted. To delete the page type (or any information) from multiple selected pages, click the page icon with the small cancel icon. The small cancel icon will turn red when you place your mouse over it. When clearing information from multiple pages, Macaw will confirm the number of items that will be affected.

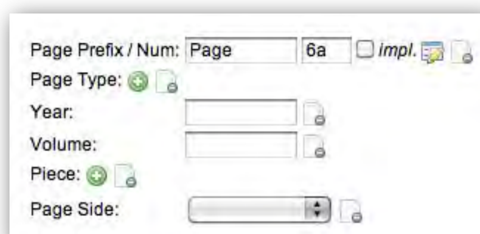
Entering Page Numbers

The main window has three fields for entering page numbers. The fields are "Page Number Prefix", "Page Number Value", and "Implied Page Number". These fields are used to enter exactly the page number that is displayed on each page. The prefix for a page number is any words or values that precede the actual number of the page (such as "Page" or "Plate" or "Illustration",) and the value is the numeric part of the page numbers itself.

For example, if the page number on page 5 of the book is labeled "pg. 5" then the prefix is "pg." (including the period, but not the space) and the value is "5" and since the page number is printed in the book, the page number is not implied. Generally the information entered into these fields should be exactly what is printed on the page in the book.

If there is a page in the book (such as an illustration page) that has no page number printed on it, and the sequence of the pages numbers before and after the illustration skips over the illustration, then the page number fields should be left blank. If the sequence of page numbers includes the illustration, but it is not printed on the illustration page, then you should enter the page number prefix and value and indicate that the number is *implied*.

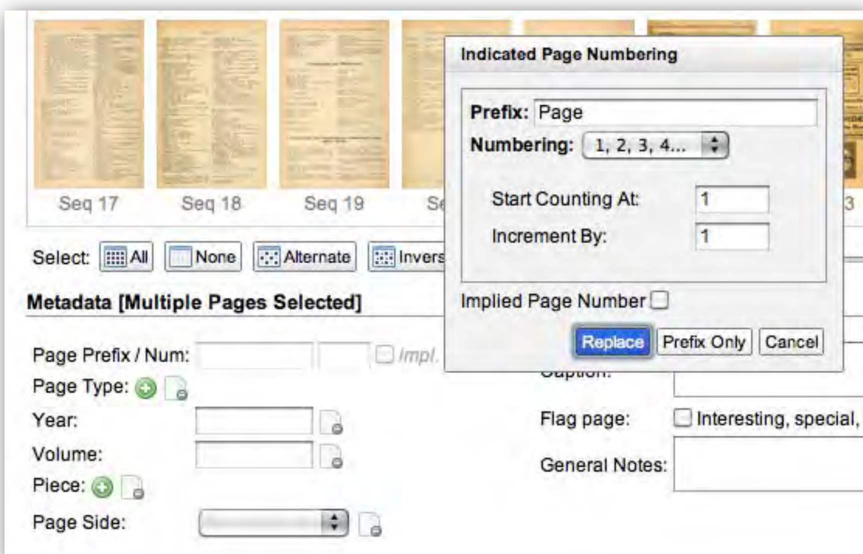
In some cases, a page number may not have a prefix in which case you would leave the prefix blank. In other cases, the item may be numbered 1a, 1b, 1c, 2a, 2b, … in which case you would need to enter these values individually for each page. Macaw is not capable of numbering these automatically.



Automatic Page Numbering

To automatically indicate page numbers for a group of pages, click on the edit button located to the right of the "Page Number" textbox. This will bring up the "Indicated Page Numbering" dialog box.

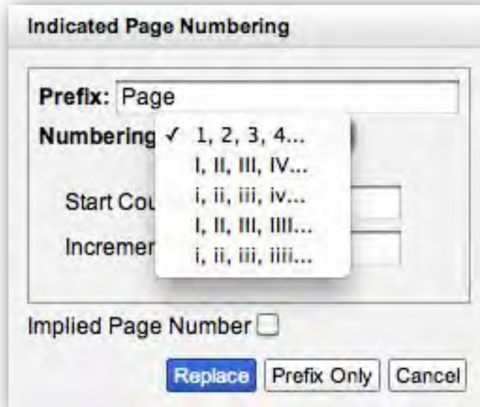
Here, you can type in a desired prefix that will display at the beginning of all selected pages. Next, choose a numbering "Style" to apply to the selected pages, such as numbering pages 1-100 as integers, or I-C in Roman Numerals. Then, enter where you want the page counting to start (such as "start at page 5") by entering the a value to start with in the "Start Counting At" text box. Finally, indicate what increment you want the numbering to increase at in the "Increment By" text box.



For example, if you have selected pages 5-15 in the book, and you want them to display as "Page 5", "Page 6", etc., simply type "Page" into the "Prefix" field, choose the numbering option "1, 2, 3, 4...," enter the "Start Counting At" value as "5", and set the "Increment By" value to "1."

Hint: Using the "Start Counting At" and "Increment By" fields, you can number only the odd or even-numbered pages. Simply enter 2 into the "Increment By" field. If you start at 1,the numbering will be 1, 3, 5, 7, 9, … and if you increment by 2, then the numbering becomes 2, 4, 6, 8, 10, …

Another Hint: If you want the pagination style to be Roman Numerals, be sure you choose one of the Roman Numerals options in the "Numbering" drop-down box. (i.e., "I, II, III, IV...") Continue to use Arabic numbers (1, 2, 3, etc.) for the "Start Counting At" and the "Increment By" boxes. So, for example, if you want the Roman Numerals to start at "II", in the "Start Value" box, enter "2".



Additionally, you have four choices for the formatting of the Roman Numerals. These are all- uppercase and all-lowercase versions of two different ways of representing the value "4" which are "iv" (or "IV") and "iiii" (or "IIII"). When choosing the "IV" format, the value of 40 is displayed as "XL", and the value of 400 is displayed as "CD". When choosing the "IIII" format, 40 is displayed as "XXXX" and 400 is displayed as "CCCC".

Only Page Prefixes

Sometimes, you want to add a prefix to a group of pages without redoing the entire automatic pagination. In this situation, open the “Indicated Page Numbering” dialog box, enter a value into the “Prefix” field and click the “Prefix Only” button. This will apply the new prefix before any existing prefixes for all of the selected pages. A space is added between the new prefix and any existing prefix for you.

If you have only one page selected, then you can simply update the prefix in the main window by updating the first field for the Page Number.

If you want the numbering to be implied (such as designating page numbers to pages that are not actually asserted in the physical book), simply click the "Implied" box at the bottom of the pop up box. This will display all pages as "Page 5 impl.", "Page 6 impl.", etc. The italic "impl." indicates that the page number is implied.

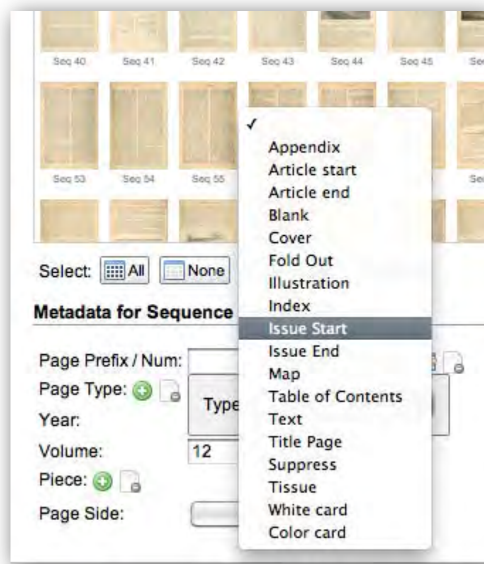
gartenflora65russ_0005	6	Page I *impl.*	Text, Title Page
gartenflora65russ_0006	7	Page II	Blank
gartenflora65russ_0007	8	Page III	Text, Index
gartenflora65russ_0008	9	Page IV	Text, Index
gartenflora65russ_0009	10	Page V	Text, Index

IMPORTANT: The "Page Number Value" field is meant as the space to enter **page numbering** information only. Any numbers that are entered into this field that do not relate to page numberings will be incorrectly read by the citation resolver as page numbers. So, for instance, if you enter into the "Page Number" field the text string "Vol. 5, No. 3, pg. 6" the citation resolver will not be able to distinguish that "5" relates to the volume, "3" relates to the number, and it is only "6" that asserts the actual page number. Instead, it will believe that the "5" is indicating the page number, and all machine-to-machine communication and citation resolving will act upon this incorrect assumption. Thus, only enter numbers into the "Page Number Value" field that applies to a page number for that page. If you need to assert volume or issue information for an item, you will do so in a different field, which will be addressed in later steps. In our example above, enter "Vol. 5, No. 3, pg." into the prefix and 6 into the number field. (Additionally, you should enter Volume and Number into the *Volume* and *Piece* fields separately.)

Furthermore, only **1 page or plate number per page** should ever be entered into either the "Prefix" field or the "Page Number" field. If you are paginating a page that is both a numbered page within the text and also contains an articulated plate number, **place the page number only into the "Prefix" or "Page Number" field**. Use the Prefix field to enter the plate number information. So, for example, if you are paginating an item that has a page 5, but that page 5 also includes plate 9, you should enter the information it as follows: *Prefix Field* = "Plate 9, page"; *Page No Field* = "5". Remember, as discussed above, this page, if it contains both text and a plate, should be designated as both page types "text" and "illustration."

Issues and Articles

If you are working on an item that contains multiple articles within each item, there are a couple of steps you should take in order to help both human navigation and machine-to- machine communication and citation resolving.

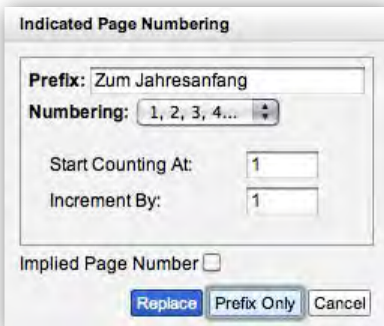


First, for each article start and stop, please indicate such occurrences in the "Page Type" field. For example, if you are working on an issue that contains five individual articles, find the page within the text that is the start or first page of an article. For that page, designate the "Page Type" as "Article Start." Then find the last page of the article and designate the "Page Type" as "Article End." Do this for each article within the item you are paginating.

Secondly, if you want to display the title (or abbreviated title) for each article within the issue you are paginating, please do this using the "Page Number Prefix" field in the main window

Note: Please do not add the title of the article to each page within the article – this will unnecessarily clutter the screen for users.

Since you can enter non-page number identifying information into the "Prefix" field, and we want the computer-to-computer communication to be able to link each page with a page number, we do not have the option to have the article title display after the page number. In order for the page number to be readable to a machine, there must be a value in either the "Start Counting By" field of the "Indicated Pages" box (when using the "Replace" button). However, any information entered into the "Prefix" field is automatically displayed first in the string of information associated with each page. If you manually type the page number into the Prefix field first in order for the page number to appear before the article title (i.e. "Page 13, Zum Jahresanfang"), the computer will not be able to associate a page number with that page and therefore correct citation resolving will not occur. Thus, if you want to display the article title for the user on the first page of the article start, it must display before the page number.



Year and Volume

If the item you are working on is a particular volume of a serial, and/or is a volume that also contains multiple issues or numbers, use the "Year," "Volume" and "Piece" fields, as well as the "Issue Start" and "Issue End" Page Types, to enter this information.

For example, if you are paginating volume 15 of The Journal of Shellfish Research, and this volume contains multiple issues bound within it, you would follow the following steps:

1. Assign all pages as Vol. 15.
2. Assign each issue's number and year
3. Set the Issue Start and Issue End page types for the appropriate pages.
4. Repeat Step 2 and 3 for each issue.

To begin with, in order to assert all pages within the book as "volume 15," click on the "Select All" option located beneath the list of pages in the book. Be sure that you only do this if you know that the item you are paginating contains only one volume. If the item you are paginating contains several volumes, the quickest way to quickly assign all pages from one volume as that volume is to find the first and the last pages of that volume in the item, click the first page, hold down the SHIFT key and then click the last page. This will then select only the pages from the particular volume you are about to assert without manually having to click on each page.

Once you have selected the appropriate pages, enter the correct year information in the "Year" field and the correct volume information in the "Volume" field. If the item you are working on does not designate a specific volume (such as volume 20), but is instead designated by its publication year (1908), do not enter any information in the "Volume" field. Simply enter the year information into the year field and leave the volume field blank.

Please note that the designation of "vol.," "bd.," etc. will not automatically display from these fields. You must enter this designation in the field itself. So, if you are designating volume 15, in the "Volume" field enter "15."

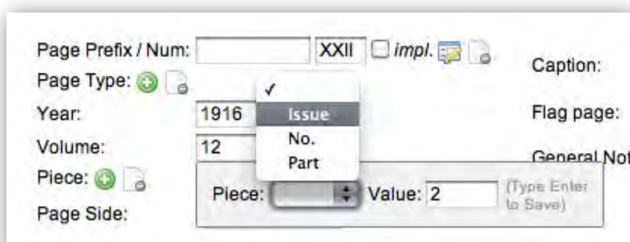
Note: Please only enter alphanumeric values for volume, year, and issue numbering. So, even if the volume is printed by the publisher as "Volume XX", please enter the volume information as volume 20.

Before moving on to adding issue information, and once you have correctly asserted the volume and year information to the appropriate pages, be sure to click on the "Select None" button to unselect all of the pages. If the item you are working on happens to contain only one issue per item, and thus all pages that are already selected can remain selected when you enter issue information, you do not need to click on the "Select None" button.

More often than not, a volume will be bound with multiple issues. In order to designate, both for computer-to-computer communication and user navigation, where an issue starts and stops within an item, use the "Issue Start" and "Issue End" Page Types and the "Piece" field located below the "Volume" field.

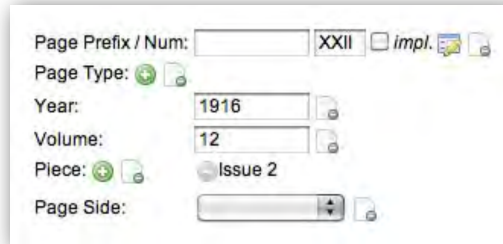
To begin, find where an issue starts within a volume and select that page. In the "Page Type" field, select "Issue Start." Then find the last page of the issue, hold down the SHIFT key and click the page. This selects all pages of that particular issue.

You may now enter the issue information into the "Piece" field. Again, please enter issue numbering only in alphanumeric values. Select which "type" of piece it is from the drop down menu to the right of the "Piece" label (i.e. Issue, No. Part), and enter the correct value into the "Value" text box. Be sure to hit the Enter key to add the new Piece.



Once this is added, click the last page from this issue to deselect all other pages and select only the last page. Then assign the Page Type of "Issue End" to this page.

Repeat this process for all issues or pieces within this volume. While this information does not currently display to users, it will eventually be displayed on the pages designated as "Issue Start." So, for each page type of "Issue Start," the year, volume, and piece number will also be displayed, thus easing navigation for users.



Once all pagination edits have been made, click the "Finished" button to set all pagination changes and indicate that you have completely finished working on this book. You may also use the "Save" button to save your work before leaving the page, or the "Finish Later" if you want to save your work and come back later.

Questions or Comments?

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