Scanning Images and Uploading to Website

This file can also be found in G:\Archives\Ahxasst\ER Working Folder\Image Scan Resources\ScanningProcedures.doc

Please use these guidelines to provide the highest quality image services possible.

Section I. **Scanning an image (pp. 1-3)**
Information on the procedures for creating a digital image from a print using the EpsonScan software

Section II. **Creating Derivative Images in Photoshop (pp. 3-6)**
Information about using Photoshop to create images for researcher scanning orders and doing batch conversions of images for posting to the Archives website

Section III. **Uploading Images into Archon (pp. 6-8)**
Information about creating an Archon Digital Library File, uploading low-resolution, watermarked images to Archon and associating them with files, and properly attributing accurate metadata to images

I. Scanning an Image (these instructions are for EpsonScan Software. Please familiarize yourself with the features/procedures for using another software, if that is what you prefer)

1. Go to G:\Archives\Ahxasst\ER Working Folder\Numbered Scans
2. Find the number of the last image scanned. The image you will scan must be the next number in sequence (e.g. if the folder contains 15 images and the last image in **0004011**, the next file number is **0004012**. **If you do not check this you may overwrite existing files**)
3. Turn on the scanner.
4. Open EPSON Scan, (a shortcut is on the Desktop or you can access it via the Program Menu).
5. If scanning prints, make sure the white background is in place in the top portion of the scanner. If scanning film, remove the white background to expose a clear glass scanning apparatus.
6. Place the image or negative on the scanning bed, using the templates/guides for negatives if necessary.
7. If this is your first time opening EPSON it will provide you will different options about the "Mode" to scan in. Choose "Professional Mode" rather than "Home" or "Full Auto" Modes.
8. When the EPSON Scan program opens there are several dropdown selections–selecting incorrect settings will taint the scanning process.
    a. If the image is a print choose "Reflective."
    b. If the image is a negative or a slide select either "Film (With Film Holder)" or "Film (With Film Area Guide)." **In Room 19, the equipment to scan negatives is located in a Hollinger box called "Scanner Templates."**
    c. If scanning prints:
        i. Set Document Type to "Document Table"
        ii. 'Auto Exposure Type' is either 'Photo' or 'Document' depending on the print
        iii. For black and white prints, set 'Image Type' to '8-bit Grayscale'
        iv. For color prints, set Image Type to '24-bit Color' **Select only 8-bit gray or 24-bit color. Any other selection will lead to a file that cannot be used in further steps.**
        v. Set 'Resolution' to 600 dpi
        vi. You may also select 'Unsharp Mask Filter' or 'Descreening Filter' especially if working with newsprint/magazine/Illio images
    d. If scanning film:
        i. 'Film Type' is either 'Positive Film,' 'Color Negative Film,' or 'B&W Negative Film'
        ii. For black and white, set 'Image Type' to '8-bit Grayscale'
        iii. For Color images, set 'Image Type to '24-bit Color' **Select only 8-bit gray or 24-bit color. Any other selection will lead to a file that cannot be used in further steps.**

        iv. Set 'Resolution' to 600 dpi.
        v. You may also have to change the output size ("Target Size") if

working with a very small image (e.g. 35 mm negative or yearbook portrait). If so change output size to something manageable (5 X 7, etc).

vi.   You may also select 'Unsharp Mask Filter,' 'Grain Reduction,' or 'Dust Removal', especially if working with older and larger negatives.

9. Click 'Preview' at the bottom of the window. The preview image will appear to the right. When the mouse pointer is over the preview, crosshairs will appear. Use this to select the actual area that you would like scanned. This will appear as a dotted-line box. If the image is not aligned in the dotted-line box, do not worry this can be adjusted using Adobe Photoshop. See II.A for more information. When working with 8 x 10 images they will need to be scanned perpendicular to their original orientation and rotated in Photoshop during Step II below. Scan an area larger than the image to create a border around the image. Users of the image can delete this if they choose.

10. After highlighting the area, EPSON Scan automatically optimizes the contrast, brightness, etc. If this automatic feature is not satisfactory, 'Reset' the image output controls and manipulate the image with Photoshop later.

11. When you are satisfied with the preview of the image, click 'Scan'

    a. For 'Location,' select the 'Numbered Scans' folder referred to in Step 1

    b. Use 'File Name and Prefix' to record the file name in the 'Numbered Scans' folder. For example, if you are recording image 0003543 record the prefix as 0003 and the file name as 543.

    c. For 'Image Format' select "TIFF" (*.tif) with Windows byte order and no compression. If a scanning order requests tiff for MAC or jpg derivative, files will be produced in Adobe Photoshop.

    d. At the bottom of the screen the box "Overwrite any file with the same name" should be unchecked. The other two boxes, "Show this dialog box before next scan" and "Open image folder after scanning", should be checked.
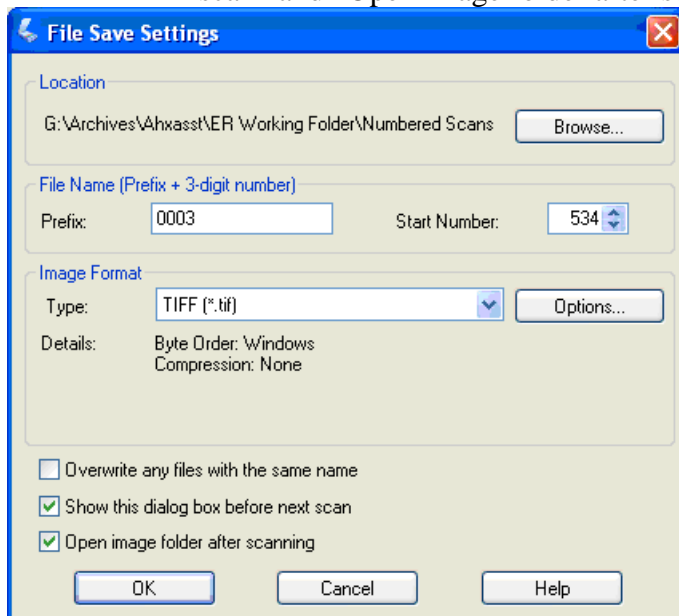
    e. Click OK. The image will now be scanned. Leave the Scanner closed until the process is finished. You will know it is finished when the location folder for the scan appears on the screen with the file that you just scanned added to it.

12. After the scan is complete and the file number is assigned, write the number on the back of the original image. Do this in a conspicuous place (upper-right corner, middle of the bottom edge, etc.), in pencil and press lightly so to not impress the photo.

II. Creating Derivative Images in Adobe Photoshop.

The following steps require the use of Adobe Photoshop. To open an image in Photoshop, right click on the file and select 'Open With'. Then select 'Adobe Photoshop'. Before images are distributed to users or altered for web display, make sure that the images have a high quality appearance in the source file (i.e. the file you just scanned as a 600 dpi tiff). If during any step of this you think that you 'mess up' the image, do not worry. In the top menu bar, under the 'Edit' dropdown select 'Step Backwards'. This will undo your mistake.

Aligning an Image

***If the image as scanned is not 'square' and 'right-side-up,' correct the orientation and overwrite the original scanned image:
→ If the image needs to be reoriented so that it is 'right-side-up':
-Select 'Image' in the top taskbar.
-Select 'Rotate Canvas' and adjust the orientation (90 degrees clockwise, 180 degrees, etc.)
-Select 'Save' in the dropdown of 'File' in the top taskbar.
→ If the image is not square in the frame there are several ways to adjust this. The easiest way is to use the crop tool. This requires that you scanned plenty of 'empty space' around the image:
-Select the 'Crop' tool in the left-hand side toolbar (if you are unsure, hover the mouse over each tool and the title of the tool will appear after a second)
-Click and drag to create a crop box. You can change the location and dimensions of the crop box by clicking on the corners and moving the sides of the crop box until it fits exactly where you want.
-To adjust the squareness of the image, move the mouse on outside of the crop box but still inside of the image canvas. When a curved arrow with two heads appears, left-click and then move the mouse. This will cause the crop box to rotate slightly. You can then align it so that it is parallel to the edges of the image (many images are not completely square so just get close to parallel on all four sides if this is the case). When you are satisfied with the alignment and you have made sure to leave enough room for a border around the image, click on the 'Crop' tool icon again and a dialog box will appear. This asks you to complete the crop process. Select 'Crop' if you are ready. Select 'Don't Crop' if you are not ready. Remember that if you crop by accident and you didn't mean to just go to 'Step Backward' under the 'Edit' Dropdown.

Changing Resolution and File Type

***If a scanning order is for an image in any other format that 600 dpi tiff, use Photoshop to create the correct format for the order.

-Before creating the correctly formatted image, there needs to be an Order folder created for it. This will be where scanning order images will be saved in order to keep all of the numbered tiffs in their preservation format (600 dpi tiff). Open the 'Order' folder of the 'ER Working Folder' and then create a new folder. The naming convention is the last name of the person placing the order and the date (MMDD format) when the image(s) is(are) posted, e.g. 'Johnson Order (0521).'

-To create the user's desired resolution and format – With the image open, select 'Image' in the top taskbar. Then select 'Image Size' a window will open with several boxes. Change the number in the box titled 'Resolution' to the desired size (300, 72, etc). Click OK. Now that the image is the correct size, select 'Save As' in the dropdown of 'File' in the top taskbar. The name of the image will remain the same as the number, but the format can be changed at this point if the scan is to be in JPEG format. Save the image to the correct 'Order Folder'. When saving a JPEG an options window will appear. Please make sure that the image 'Quality' is 12, then click OK. When saving a tiff (in particular for Mac) the 'Compression' should be none and the 'Byte Order' should be set to Mac or PC, whichever the order requests (If saving as a tiff for PC there is no need to worry about this, since the image was scanned originally as a tiff for PC).

-To post the researcher's image(s) to the web, the image will be saved to the W:\Temp folder. To do this, you can open the W:/Temp directory. Create a new folder and call it simply the researcher's last name, e.g.' Johnson' (do NOT include the word "Order" or the date of creation – it keeps the link that will be generated later simpler). Then copy and paste the researcher's image(s) from the Order Folder to the Temp folder. The image is now posted and can be accessed via a link resembling 'http://www.library.illinois.edu/archives/temp/XXXX' where XXXX represents the name of the folder EXACTLY as it is labeled in the Temp Directory. Then provide the researcher with this link and they can access their image.

<u>Converting Images for Archon and Web Display</u>

***ALL IMAGES MUST BE CONVERTED TO AN EMBOSSED JPG PRIOR TO BEING UPLOADED TO ARCHON
Please follow these steps to convert the image to a watermarked, low-resolution PSD file (Photoshop document). After the image has been converted, it will be necessary to add the tiff number to the watermark, then flatten the image, and then save the image as a jpeg. The watermark should be located in the bottom left of the image and it should read something akin to:

UIUC Archives – Low-Res Proof
XXXXXXX.tif

(XXXXXXX is the 7-digit identifier associated with each image)

1. Select the images in the 'Numbered Scans' folder that need to be converted and copy them to the 'For JPG Conversion' folder within the 'Numbered Scans' folder.
2. Using Photoshop, select 'File' in the top taskbar. Then select the 'Automate' dropdown,

then 'Batch'

3. A window will open titled 'Batch'. The first box is 'Set' this refers to which directory of actions is to be used. All Archives computers use Adobe Photoshop CS3 and you can therefore select '**UA Photo Actions CS3**'. If a computer does not use Photoshop CS3, talk to Chris Prom to remedy this.
   a. If you cannot choose the '**UA Photo Actions CS3**' set for one reason or another find the 'Actions' box on the far right of the main Photoshop screen. in the top right of the 'Actions' box click the small arrow pointing down with 3 mini menu lines next to it. Select 'Load Actions' about 2/3 down the dropdown menu. Then select the correct action SET from the 'UA Photo Actions' folder in the ER Working Folder.
4. After the SET is correctly selected, choose 'Embossed JPEG' in the 'Action Window'
5. In the box titled 'Source', the correct option should be 'Folder' and the folder should be the 'For JPG Conversion' folder. The 'Override Action "Open" Commands' box should be checked, as should the 'Suppress File Open Options Dialogs' and 'Suppress Color Profile Warnings.' The Include 'All Subfolders' box should be unchecked.
6. In the box titled 'Destination' the correct option should be 'Folder' and the folder should be the 'Embossed JPG Transfer' folder in the 'Embossed JPEGS' folder of the ER Working Folder. The 'Override Action "Save As" Commands' box should be checked.
7. The File naming options should be left as is as well as the Errors option. CLICK OK – The batch will run automatically and the result will be embossed jpegs ready for upload (If errors occur during scanning it could mean several things from the color setting of the original scan to whether the correct Action SET was chosen for the corresponding computer. Following the steps in scanning and converting will prevent any errors).
8. Open the 'Embossed JPG Transfer' folder. The converted files will appear as PSD files. Open each file, one at a time, in Photoshop and use the following steps:
   a. Make sure that the Photoshop "Text Type" tool is selected (the icon is a large "T")
   b. Hover over the text that already exists on the image and then left click on it (if your cursor is not automatically inserted into the text, then you may have created a new text layer. Look at the layer window in the bottom left of the Photoshop window to ensure that you have only one layer. If there are two, then in the layer window drag the second layer to the trash icon.
   c. Using your cursor arrows or end command key, go to the end of the text that is written (the last word in the phrase is "Proof"). Insert a carriage return so that the cursor is one line below the text and then enter the 7-digit identifier for the image followed by .tif (e.g. 0000521.tif).
   d. Click on the background layer in the layer window.
   e. Select "Layer" from the top menu, then select "Flatten Image" (you can use the keyboard shortcut (ctrl+shift+E) to "Merge layers down" which has the same effect as flattening the image IN THIS INSTANCE ONLY).
   f. Select "File" from the top menu, then select "Save File As" (you can use the keyboard shortcut (ctrl+shift+S) as well). Save the file as the same number, but as a JPEG file type.
   g. Close the image and go on to the next one repeating these steps.

9. Check all of the converted and completely watermarked images with any image viewer (Widows Picture and Fax Viewer allows you to scroll through the entire folder without opening each image).
   a. If the converted images look right, they are ready to be uploaded. Cut the correct jpegs from this folder and place them in the general 'Embossed JPEGS' folder (one directory level up).
   b. All of the Tiffs that were copied to the 'For JPG Conversion' folder can be deleted at this point. MAKE SURE YOU ARE DELETING COPIES AND NOT ORIGINALS.
   c. If the embossing is too big for the image, this can be adjusted when adding the tiff number to the text watermark by simply highlighting the current text and changing the font size or other parameters as necessary. If there is some other problem, it may be necessary enter the watermark by hand (the instructions for which are noted in the "Archives Credit Line" instructions.

III. Uploading Images to Archon

When Jpegs are correctly converted and in the 'Embossed JPEGS' folder of the ER Working Folder, they can be uploaded to the Archon site. For examples of images that are loaded into Archon correctly and have complete metadata look at image 0003795 or 0005185. If you are not 100% certain, use these examples as templates to follow for the layout / style of how the information is presented. *Consistency is professional*.

1. Login to Archon and enter the 'Admin' page (staff interface).
2. At the left of the window, click on the arrow and then select 'Digital Library.' In the dropdown, select 'Digital Library Manager.'
3. When the Digital Library Manager window opens select 'New' at the top Archon module window. Then enter a 'Title' for the image. The title should be descriptive yet short (6-7 words max) (e.g. "Observatory Interior Showing Rigged Telescope" (0005185)).
4. 'Enable Web Output' should be selected to YES, unless you are working with material for which we do not want the public to be able to search the Metadata (e.g. working on a large batch of images and want them all to go live at once, or working with materials from an organization (e.g. ALA, ATO, AALL, AdCouncil) that does not want the public to be able to see any sort of a digital record for the images that we scan for them.
5. The 'Identifier' is the entire tiff number (e.g. 0005185)
6. The 'Date' is the date of the image, unknown dates should be given a 'circa' tag with an approximate date (questions can be directed at Chris or Bill).
7. The 'Content URL' option does not generally apply to images. The 'Collection' information is what will link the image to a record series. You can enter either the name of the series (e.g. Photographic Subject File) or the Record Series number (e.g. 39/2/20) and then select the appropriate series from the dropdown.
8. Then click SAVE in the top buttons of the Archon Module.
9. Now the other tabs in the Archon Digital Library Manager module will be enabled, (file(s), Creator Information, etc.). The first tab to choose is 'File(s)'
   a. The 'Title' is a generic name such as 'image'
   b. Before you can select the image in file dropdown, you must populate the

dropdown by selecting 'Upload File' and Browse to select the 'File.' Choose the correct file in the 'Embossed JPEGS' folder (This file name should be the same as the entire tiff number, e.g. 0005185). From here then open the dropdown under the 'File' heading and select the image you have just uploaded. (When doing a large batch of images, there is a means of mass import which Chris can explain if necessary).

    c. <u>IF</u> the Archives is not the copyright owner AND we know the rights owner AND they have not given us permission to publish images (e.g. Champaign-Urbana News-Gazette), then choose 'None' for the access level. This will keep the image from appearing to the general public but will keep the metadata available. If you have any questions about rights, direct such questions to someone who knows, such as Bill or Chris.

    d. When finished with uploading files, select 'Save'.

10. Next, select the 'Detailed Description' tab. Fill in the information in the following fields:

    a. 'Scope' – This is a detailed description of the photo that is too much for the title but relevant to those looking at the pictures. This should read as a narrative with all of the relevant keywords included throughout (e.g. "John Bitzer, portraying Chief Illiniwek, jumps and does the splits in midair in Memorial Stadium. The IMPE facility can be seen in the background" 0005184). At the end of the information, create a line break (hard return) and include a section about the location of the image using the following format:

        Original print (or negative) located in RS ??/??/???, Box ?, Folder ?.

    Also include any relevant information about cross referencing in this section (such as negative number or other scans of the exact same image or very similar images (e.g. 0003014).

    b. 'Physical Description' – Include the following information: How the item is digitally stored (generally Tiff), Measurements of original item (W X H in cm); and note if the image has been scanned from a negative. (e.g. 0003014). If the image has been digitally altered in any way for display on the web, please also note that in this section.

    c. 'Contributor' – Name of person or group from where the image was acquired, if known (optional).

    d. 'Publisher' – Name of publisher, if known (optional).

    e. 'Rights Statement' – Copy exactly the appropriate rights statement from the staff [Copyright](#) page (also located in "Copyright for Photos in Archon" file, available in the ER Working Folder/Image Scan Resources folder). They are listed based on the rights of the image. Select the text for the appropriate option and copy it into this field. If you are unsure about the rights of an image, ask Chris, Bill, or Ellen.

11. If the Creator (the person who created the actual image) is known, then fill in the information in the 'Creator' tab. If it is not known, then proceed to the next tab.

12. Select 'Subjects' and link the image to at least 3 subjects. This allows people looking at different subjects to find potentially related material.

13. If there is language on the image and it is clear that the image contains written language (not just a street sign in the background, but an image of a flier for instance) then

complete the 'Language' tab as appropriate.
14. Click SAVE. The image is now successfully uploaded to the internet and can be viewed by browsing for a keyword in the title through the Archives website and selecting the correct digital archives or by clicking 'Public View.'