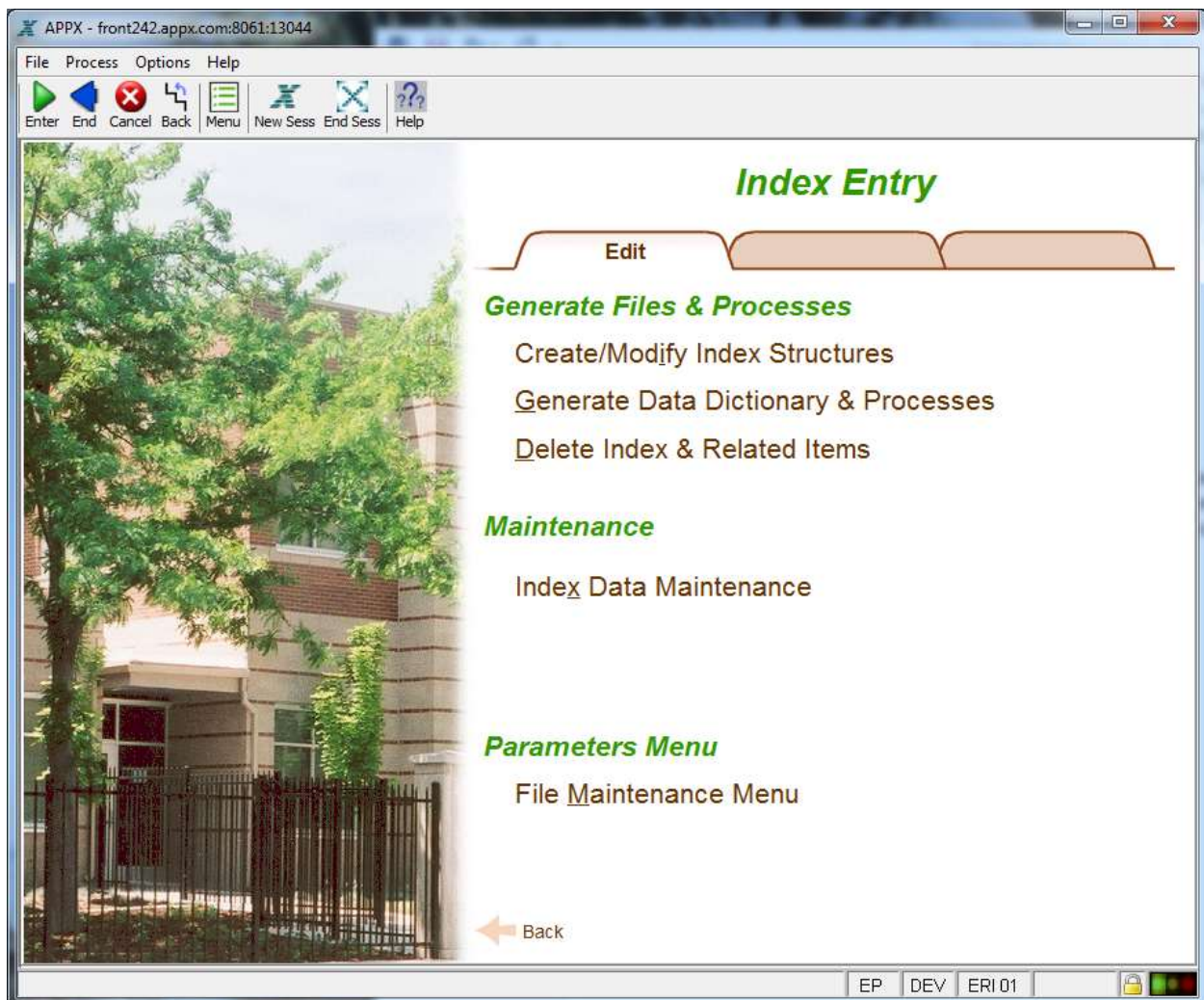


Automated Name Indexes

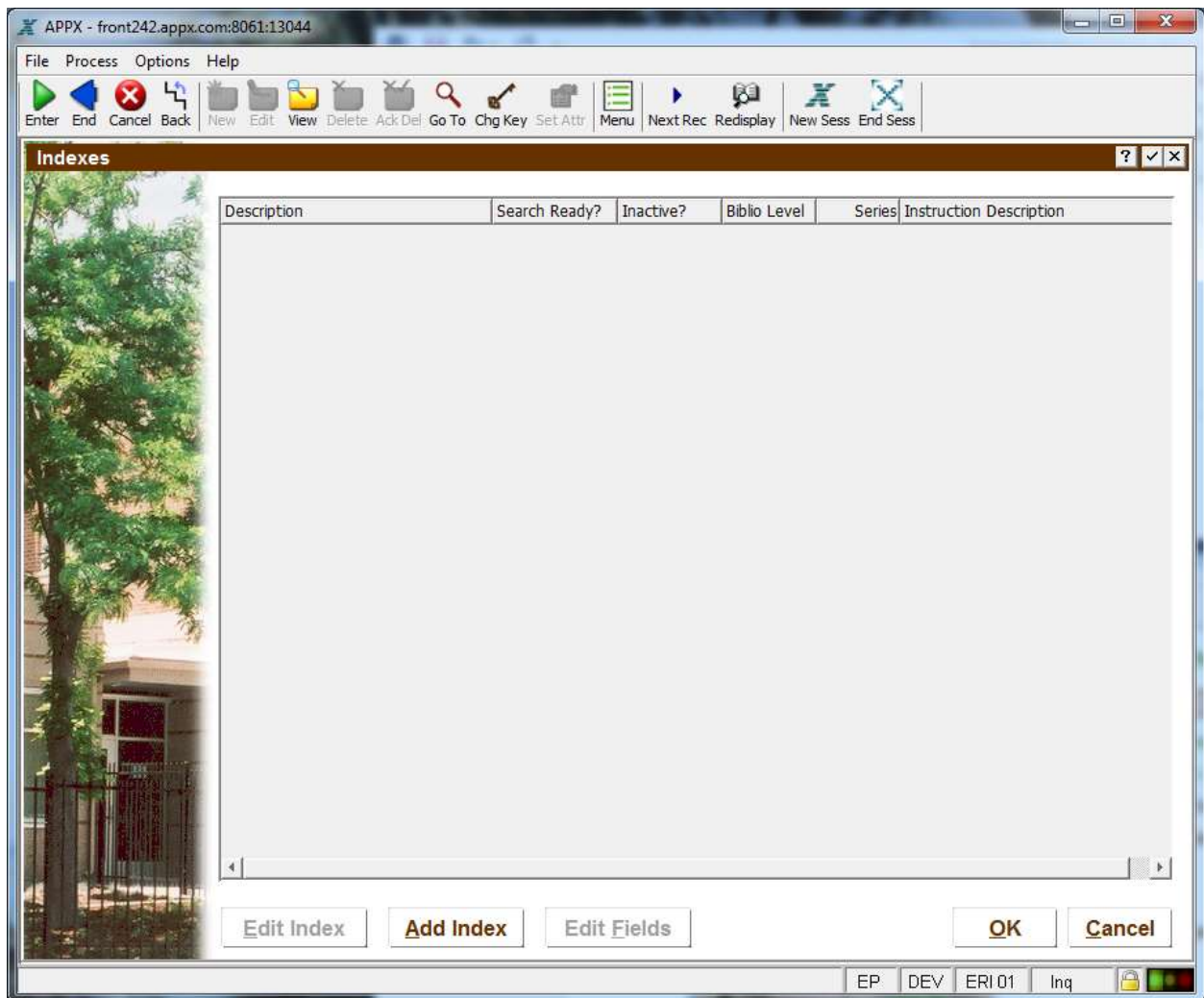
July 20, 2016

AXAEM has a feature which allows end users to upload a set of names associated with records and make those names searchable in a web interface. These processes are automated, as far as defining fields and uploading data to the database. The search engine (Solr) still requires some programming to incorporate the indexes online, although once that programming is done for an index, the index can be updated or re-uploaded, which will update Solr. These processes are different from the name index features in the IDX module, which require manual programming for everything. Features currently used in IDX are not all contained here, such as supporting date fields where each piece of the date is in a separate fields (helpful for records with some incomplete data), as well as the online ordering process when someone wants a copy and the copy downloaded from the website is insufficient (such as for certified copies).



Click Create/Modify Index Structures.





Click Add Index.

APPX - front242.appx.com:8061:13044

File Lists Lists Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess Print

Enter/Edit Indexes ? ✓ ✕

Basic Information

File Description

Search Ready? ☐

Inactive? ☐

Bibliographic ID 0

Search Instruction ☐

Publish ☐

Has Images/Files ☐

If set to yes, Importer assumes that all the fields in your csv file after the last field in your index file are all images/files, and import them as images. For example, if you have "John,Smith,photo1.jpg,photo2.png" as a line in your csv file, you just need to specify first name and last name in your index file, and also specify that the record contain images/files. Importer will import all the fields after the last name as images/files.

Image Storage

URL for Document Images

Path for Document Images

These paths are the common paths for all the images/files in your index. For example "var/www/html/indexPictures/". In your csv file then specify the related path to this path. For example, if you have a picture in "var/www/html/indexPictures/set1/photo1.jpg" you just put "set1/photo1.jpg" in your csv file. The same rule applies for url. If www.axaem.com/pic/photo1.jpg" is the url for your picture. Then just add "photo1.jpg" to your csv file.

System Info Edit Fields OK Cancel

EP DEV ERI 01 Add

File Description field: Enter up to 30 characters to describe the nature of the information for which you are building an index. Examples might be Birth Records, or Death Certificates.

Search Ready field: Enter Y if, and ONLY if, this index file is ready to be added to the online search. The default value is N.

Inactive field: If set to 'Y', the file can eventually be deleted using the "Delete Indexes" option on the Indexes Entry menu. An entry of 'Y' means you are no longer using this index. The default value is 'N'.

Bibliographic ID field: This is the Level ID key to the BIB BIBLGRPC file, e.g. Series, plus the number.

Search Instruction field: Enter the key to the Instructions file that describes what kind of search will be needed for this index. Additional records may be added to the Instructions file as needed.

Publish field: Specifies if the index should be available online for searching.

Has Images/Files field: Specifies if the index has any images, so APPX could create a separate file for images.

URL for Document Images field: Enter the constant portion of the URL to the images for this file, if any; the actual image parent directory and file name can be added as a field definition. For example, <http://archives.utah.gov/indexes/data/81448/>

Path for Document Images field: Enter the constant portion of the path name to the images for this file, if any; the actual image parent directory and file name can be added as a field definition. For example: </usr/local/apache/htdocs/images/81448/>

APPX - itac002sp.dts.utah.gov:8060:7440

File Lists Options Help

OK Cancel Add Change Inquire Delete Ack Del Print

Enter/Edit Indexes ? ✓ ✕

Basic Information

File Description 83886 Grand Co. Births

Search Ready? ☐

Inactive? ☐

Bibliographic ID series 83886

Search Instruction ☐

Publish ☐

Has Images/Files ☒

If set to yes, Importer assumes that all the fields in your csv file after the last field in your index file are all images/files, and import them as images. For example, if you have "John,Smith,photo1.jpg,photo2.png" as a line in your csv file, you just need to specify first name and last name in your index file, and also specify that the record contain images/files. Importer will import all the fields after the last name as images/files.

Image Storage

URL for Document Images <http://archives.utah.gov/indexes/data/83886/>

Path for Document Images

These paths are the common paths for all the images/files in your index. For example "/var/www/html/indexPictures/". In your csv file then specify the related path to this path. For example, if you have a picture in "var/www/html/indexPictures/set1/photo1.jpg" you just put "set1/photo1.jpg" in your csv file. The same rule applies for url. If www.axaem.com/pic/photo1.jpg is the url for your picture. Then just add "photo1.jpg" to your csv file.

System Info Edit Fields OK Cancel

APX ARC ERI UT Add

Click System Info. Note that the following screenshot was created after the index had been generated. It might look different prior to that event:

APPX - itac002sp.dts.utah.gov:8060:928

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

Enter/Edit Indexes (System-Maintained Information)

Record Information

Created File Name: NDX00001

Data Dictionary Needs Update?: ☐

Data File Exists?: ☒

Bibliographic Record ID: 83886 Birth registers

Index Record ID: 1 83886 Grand Co. Births

Automatically Created Processes

Enter/Edit Data	NDX00001 MAINTENANCE
Print Data	NDX00001 INQUIRY
Export Data	NDX00001 EXPORT
Import Set Data to Field	NDX00001 IMP SET FLDS
Import Data	NDX00001 IMPORT
Read Next Record	NDX00001 READNEXT
Delete a Record	NDX00001 DELETE
Delete All Records	NDX00001 DELETE ALL
Write a Record	NDX00001 WRITE
Update Name Cross-Reference	NDX00001 CREATE XREF
Delete Name Cross-Reference	NDX00001 DELETE XREF
Create Web Page	NDX00001 CREATE HTML
Display Name Value	NDX00001 DISPLAY VALUE
Import Images	NDX00001 IMPORT IMG
Get Data	NDX00001 GET DATA

Solr Processes

Update:

Rebuild:

Delete All:

OK Cancel

APX ARC ERI UT Chg

If Solr processes have been set up to work with this index, identify the process name as found in the SLR subroutines. For example, INDEX-04 REBUILD NDX00004 will rebuild Index Record ID 4. It appears that the Solr processes have to be programmed manually before an index will work with the search engine. Click OK to save your changes, or Cancel to return to the previous screen.

Click on Edit Fields.


APPX - itac002sp.dts.utah.gov:8060:7440

File Lists Lists Options Help

OK Cancel Add Change Inquire Delete Ack Del Print

Enter/Edit Indexes (Fields)

File Description: 83886 Grand Co. Births



Field Information

Sequence No 10

Description ID

Field Type NUMERIC

Field Code KEY

Include in Name Index? ☒

Group Number ☐

Use as Lookup? ☒

Display After Search? ☒

Mark for Delete? ☐

Additional Info **Next >** **OK** **Cancel**

APX ARC ERI UT Add

Each field that should be included in the index should have its metadata established on this screen one-by-one.

Sequence No field: The system assigns a sequential number to each record added. Later, the user may use this field to re-sequence the order in which the fields appear.

Description field: Enter up to 30 characters to describe the information you expect to enter or import into this field. A series of pull-down selections will help you to further refine the type of data represented.

Field Type field: Choose the type of field you want to define. Depending on the type you choose, you will next have different options to further refine the information in the index. A field type of "Numeric" indicates that the field will contain at least some numbers. If you want it to contain only the digits 0-9, you can so specify.

Field Code field: Supply the field code. Use Scan to choose one from the Field Codes file. This describes the type of information kept in this field and is used for internal purposes.

Include in Name Index field: Enter 'Y' if this field should be included in the database-wide Name Index. The database is searched by name in order to pull up a document online. If this is checked, it requires the field in question to be an Alpha, since the field will be made searchable as a name.

Group Number field: If this field is part of a name group, enter a number to define that group. Name groups usually consist of the Last Name, First Name, and Middle Name. Elements of a name group should be defined in physical order, with no other fields between them. For example, if a name index has the name of a father, mother, and child, each name of the father (last, first, middle) would be assigned Group Number 1. Then each name of the mother (last, first, middle) would be assigned Group Number 2, etc.

Use as Lookup field: Enter 'Y' if you want this group to be used for looking up data on this particular file while editing the data. You may want to use a last name field as a lookup option, for example. Only the first field in the group should be set to 'Y'. The default is 'N'.

Display After Search field: Enter 'Y' if you want this field to be part of the display that occurs when this record is found during the search on the website. If no fields are selected for display, blanks will be displayed, so you should select something for display. In a birth record, for example, you might want to see the father's last and first names and the mother's last and first names. In a death record, you might want to see the name of the deceased. For incorporations, you might want to see the company's name. The display field is 60 characters in length; fields will display in the order in which they appear in the record. The default value is N.

Mark For Delete field: Enter 'Y' if you want to delete this field. If it has already been processed as part of the Data Dictionary, Delete Mode is disallowed.

For each field type, there is some extra metadata requested.

Numeric:

APPX - itac002sp.dts.utah.gov:8060:21522

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

Enter/Edit Indexes (Fields)

File Description: 83886 Grand Co. Births

Field Information

Sequence No	10
Description	ID
Field Type	NUMERIC
Field Code	KEY
Include in Name Index?	<input type="checkbox"/>
Group Number	<input type="checkbox"/>
Use as Lookup?	<input type="checkbox"/>
Display After Search?	<input type="checkbox"/>
Mark for Delete?	<input type="checkbox"/>

Additional Info

Field Length	10
Digits Only?	<input type="checkbox"/>

OK Cancel

Additional Info

Next > OK Cancel

APX ARC ERI UT Chg

Field Length field: Enter the length of the field. This will likely vary depending on the format of the data being imported.

Digits Only field: The system defaults "N" so that you may also include alpha characters in this information field. If you want the system to ensure that only digits are entered, change the value to "Y".

Metadata needed for alpha fields includes just Field Length:

APPX - itac002sp.dts.utah.gov:8060:21522

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

Enter/Edit Indexes (Fields)

File Description: 83886 Grand Co. Births

Field Information

Sequence No	20
Description	Last name
Field Type	ALPHA
Field Code	NAME LAST
Include in Name Index?	<input checked="" type="checkbox"/>
Group Number	1
Use as Lookup?	<input checked="" type="checkbox"/>
Display After Search?	<input checked="" type="checkbox"/>
Mark for Delete?	<input type="checkbox"/>

Additional Info

Field Length

OK Cancel

Additional Info

Next > OK Cancel

APX ARC ERI UT Chg

Metadata needed for date fields includes the specificity of the date. Note that years, months, and days cannot be separate fields, which means that if an index record has an incomplete date, it may not be recorded accurately:

APPX - itac002sp.dts.utah.gov:8060:21522

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

Enter/Edit Indexes (Fields)

File Description: 83886 Grand Co. Births

Field Information

Sequence No	40
Description	Date
Field Type	DATE
Field Code	YEAR
Include in Name Index?	<input type="checkbox"/>
Group Number	<input type="checkbox"/>
Use as Lookup?	<input type="checkbox"/>
Display After Search?	<input type="checkbox"/>
Mark for Delete?	<input type="checkbox"/>

Additional Info

Date Components:

- CCYY
- CCYY-MM
- CCYY-MM-DD
- CCYY-MM-DD-hhmmss
- CCYY-MM-DD-hhmmss-th

Additional Info

Next > OK Cancel

APX ARC ERI UT Chg

Logic fields, which are checkboxes, do not have additional metadata. Text fields include Field Length (described above), plus:

Rows field: Enter the number of rows for this text field.

Cols field: Enter the number of columns for this text field.

APPX - itac002sp.dts.utah.gov:8060:21522

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

Enter/Edit Indexes (Fields)

File Description: 83886 Grand Co. Births

Field Information

Sequence No	20
Description	Notes
Field Type	TEXT
Field Code	NOTES
Include in Name Index?	<input type="checkbox"/>
Group Number	<input type="checkbox"/>
Use as Lookup?	<input type="checkbox"/>
Display After Search?	<input checked="" type="checkbox"/>
Mark for Delete?	<input type="checkbox"/>

Additional Info

Field Length

Rows ☐ Cols ☐

OK Cancel

Additional Info

Next > OK Cancel

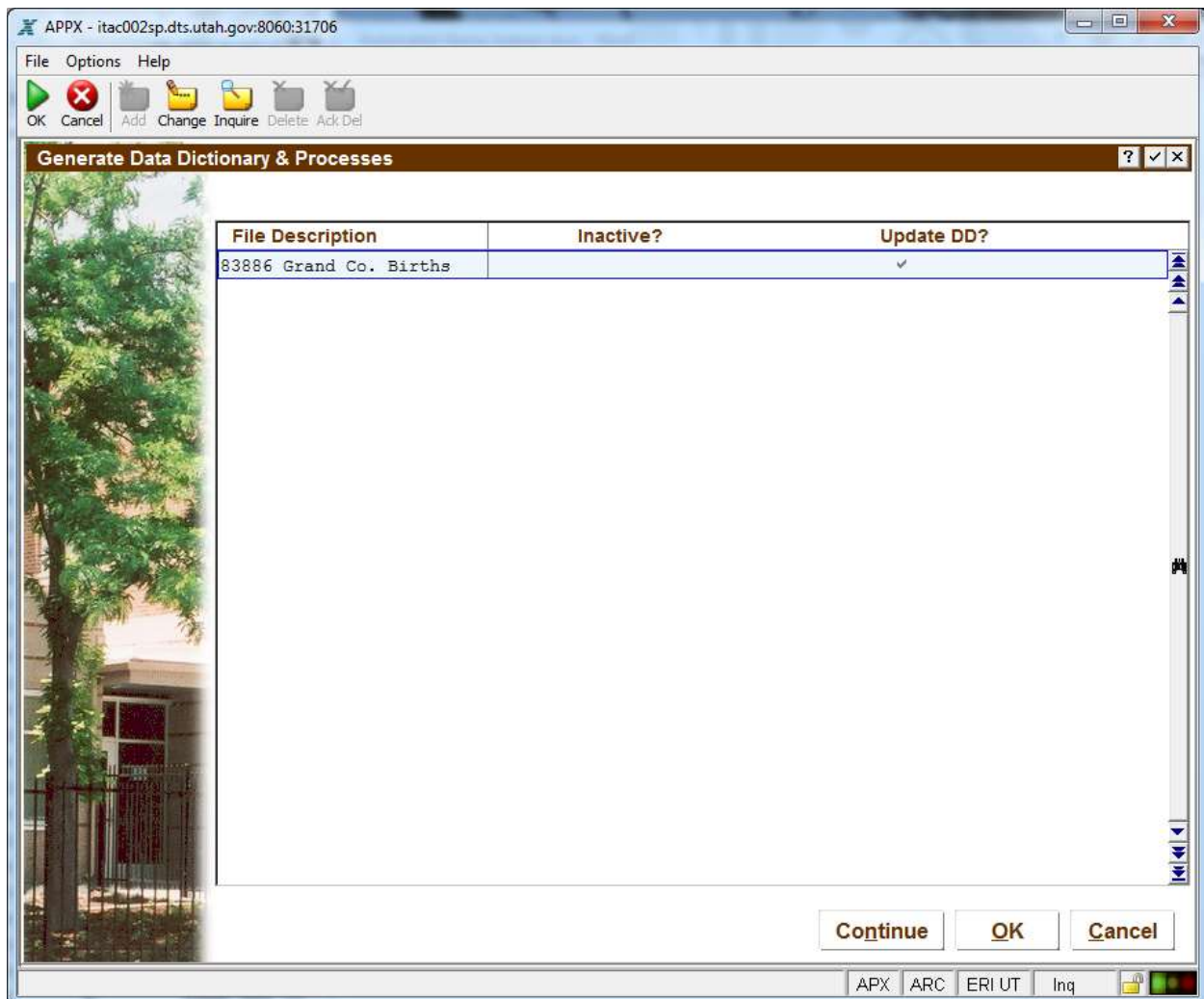
APX ARC ERI UT Chg

When you have added all the fields you need, click Cancel to return to the list of indexes.

To delete a field, check the Mark for Delete checkbox, and then on the Indexes Menu, click Generate Data Dictionary & Processes:



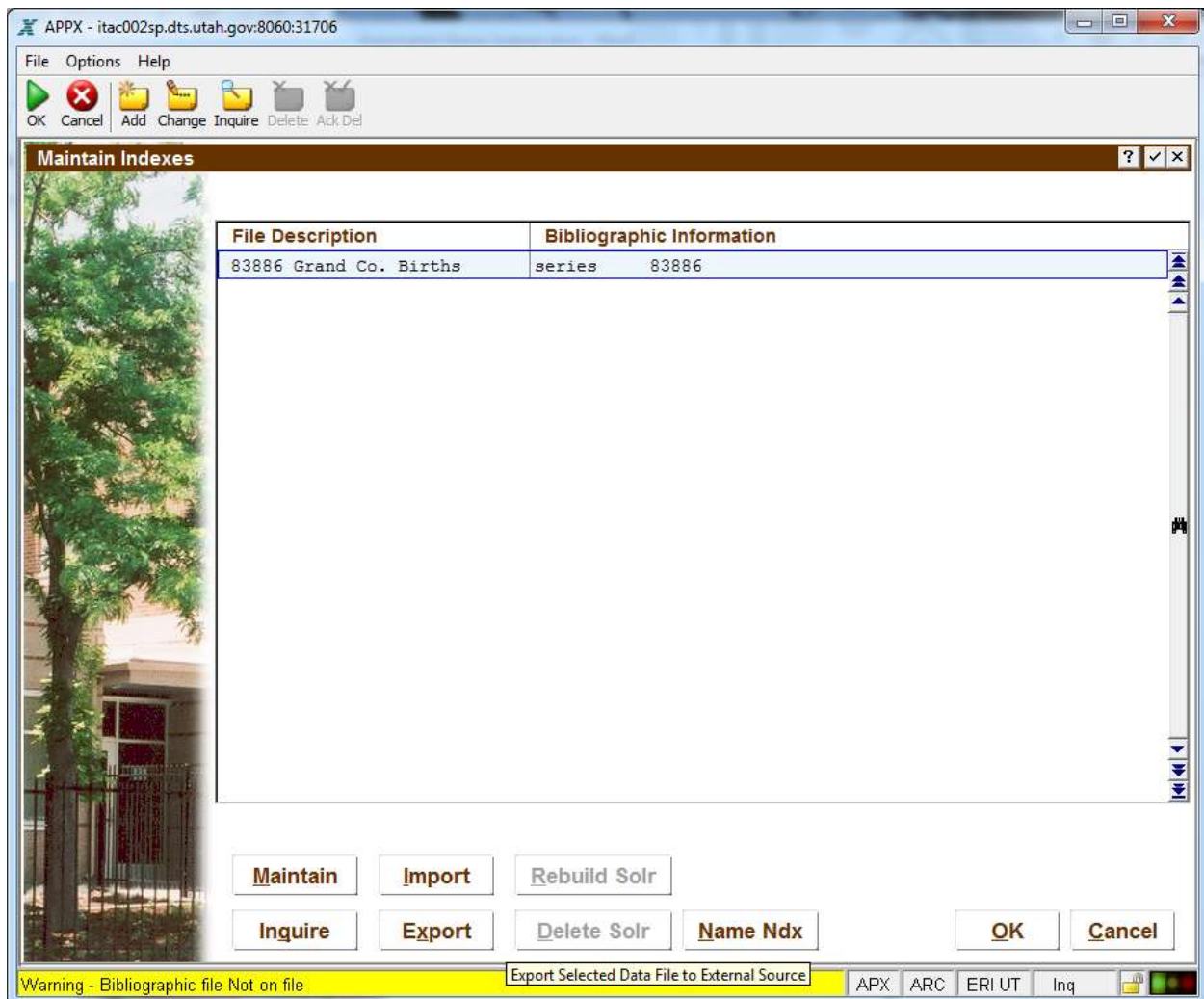
To add the new index, make sure no fields are marked for deletion, then click the same option, Generate Data Dictionary & Processes.



Click Continue. The data dictionary in the database will be updated to include the fields you entered. Now the fields can be populated with actual data.

On the Index Entry Menu, click Index Data Maintenance.





[Bug report: it is giving a warning that the series does not exist, but the series does exist.]

Click Import to import an existing spreadsheet.

Very important: The spreadsheet must be of type .csv (comma separated value, not .xlsx or similar proprietary format). Also, the first row must be data, not headers, otherwise it will not import cleanly.

APPX - itac002sp.dts.utah.gov:8060:928

File Options Help

OK Cancel Add Change Inquire Delete Ack/Del

Import Index Data ? ✓ ✕

File Location on Client (Optional) F:\indexes\83886-test.csv

Host Import Directory /usr/local/appx/data/ARC/csvfiles/NDX00001.csv

Add Records to Existing File? ☐

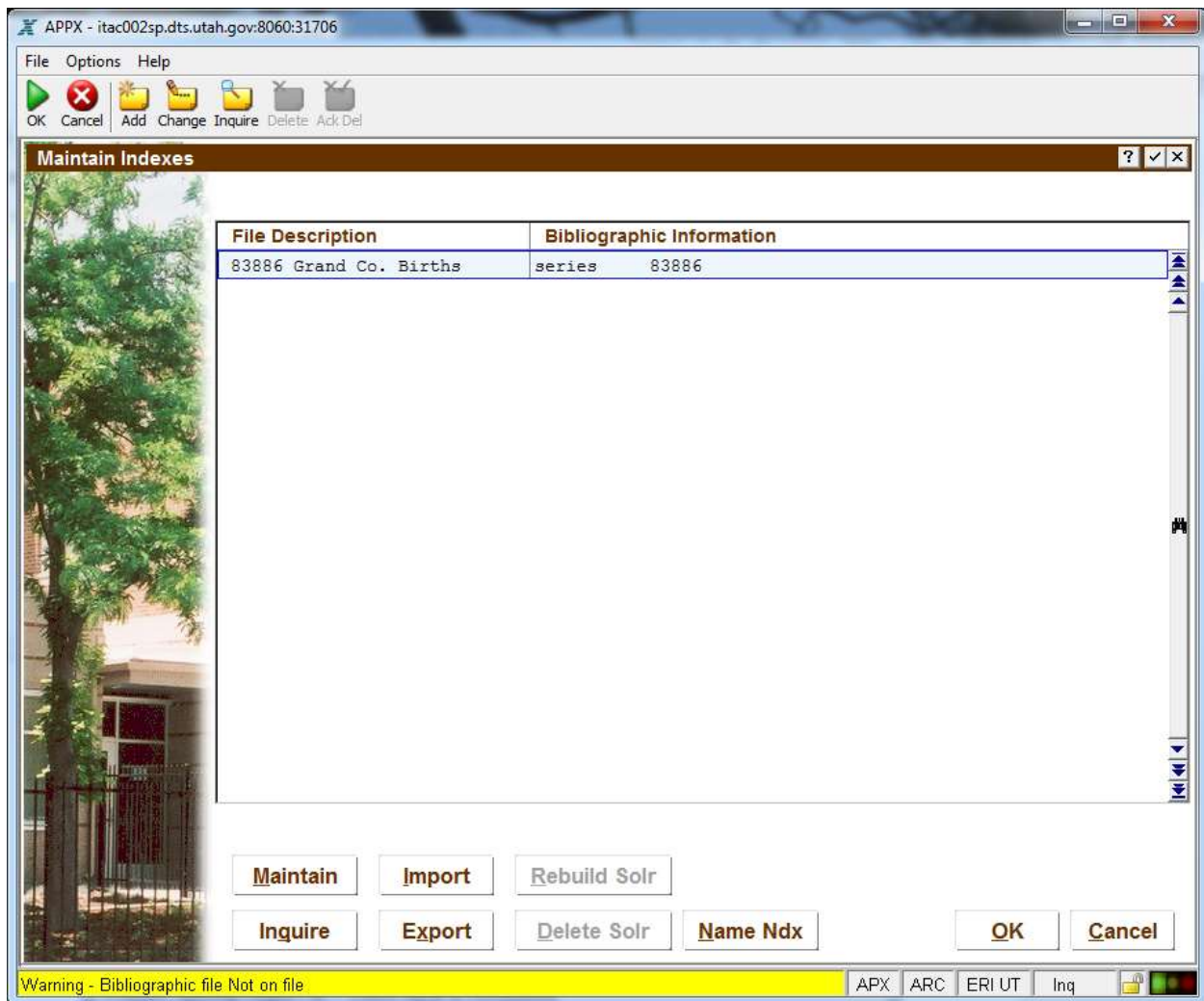
Replace Existing File with New Data? ☐

OK Cancel

APX ARC ERI UT Add

Provide the file location where the spreadsheet is found on your desktop. The Host Import Directory information is automatic. If this is an existing name index, indicate whether you want the new records to append to the existing list, or wholly replace it. Click OK. The file will upload to the server, and the application will parse the data into fields. If you run into errors, make sure that you are using a .csv. Once complete, you will be returned to the Maintain Indexes screen.

To see the data imported, click Inquire.



You may limit the set of data you are looking at by filling out the query:

APPX - itac002sp.dts.utah.gov:8060:31706

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

Query Selection

Seq	Field Name	Occ	Field Name or Constant	Occ
1	Record ID		GE	
2	Record ID		LE	
3	Page Number		GE	
4	Page Number		LE	
5	Birth Date		GE	
6	Birth Date		LE	
7	Sex		GE	
8	Sex		LE	
9	Race of Child		GE	
10	Race of Child		LE	
11	Color of Child		GE	
12	Color of Child		LE	
13	Father's Last Name		GE	
14	Father's Last Name		LE	

EQ = Equal To
 GE = Greater Than or Equal To
 GT = Greater Than
 LE = Less Than or Equal To
 LT = Less Than
 NE = Not Equal To
 IN = Includes
 EX = Excludes
 RI = Regular Expression Case Insensitive
 RS = Regular Expression Case Sensitive

(more) <-- If it says "more", press Page Down

Selection Expression Value/Blank Copy OK Cancel

APX ARC LIB UT Add

Click OK to continue. You may sort the records by various values:

APPX - itac002sp.dts.utah.gov:8060:31706

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

Query Sort Order

Sort Level	Field Name	Occ	Subheading	Subtotal	Sort Order
1	Record ID	NO		NO	+
2	Page Number	NO		NO	+
3	Birth Date	NO		NO	+
4	Sex	NO		NO	+
5	Race of Child	NO		NO	+
6	Color of Child	NO		NO	+
7	Father's Last Name	NO		NO	+
8	Father's First Name	NO		NO	+
9	Father's Middle Name	NO		NO	+
10	Mother's Last Name	NO		NO	+
11	Mother's First Name	NO		NO	+
12	Mother's Middle Name	NO		NO	+

(more) <-- If it says "more", press Page Down

Grand Totals STANDARD

Clear Sort Levels < Back OK Cancel

APX ARC LIB UT Add

You may choose to print the information, or not:

APPX - itac002sp.dts.utah.gov:8060:31706

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

Report/Print Disposition

Report Options

Print on Screen? ☒ Print on Hard Copy? ☐ Browsable? ☐
Print Summary Only? ☐ Record Limit: Format: TEXT
Report Subheading:

Printer/Queue Options

Printer ID: ARC-UP HP 4si Records Analysis
Form ID: STAN12P Standard Text Printing
Print Mode: SPOOL Print File Disposition: SCRATCH
Priority: Print Spool Date/Time: MM/DD/CCYY hh:mm ss.th
Number of Copies: 1 Notify User When Done? ☐ Print Banner? ☐

User Defined Fields Select Disposition Save Disposition
Submit to Background OK Cancel

APX ARC LIB UT Chg

Click OK to continue:

APPX - itac002sp.dts.utah.gov:8060:31706

File Process Options Help

OK Cancel Add Change Inquire Delete Ack Del

Page 1 of 87 83886 Grand Co. Births Inquiry Print? N

Archives

07/08/2016 10:35 03.62

83886 Grand Co. Births Inquiry

Record ID	1
Page Number	2
Birth Date	04/02/1898
Sex	M
Race of Child	CAUCAUSIAN
Color of Child	WHITE
Father's Last Name	TAYLOR
Father's First Name	SANFORD
Father's Middle Name	A
Mother's Last Name	TAYLOR
Mother's First Name	EDITH
Mother's Middle Name	E
Residence	MOAB GRAND COUNTY
Reported By	MRS. SARAH JANE STEWART
Line Number	1
File Name	83886-2600_12
Birth Year	1898
Birth Month	4
Birth Day	2
URL	83886-2600_12.jpg

Record ID	2
Page Number	2
Birth Date	04/16/1898
Sex	M
Race of Child	CAUCASIAN
Color of Child	WHITE
Father's Last Name	STEWART
Father's First Name	LARANGE
Father's Middle Name	A
Mother's Last Name	STEWART
Mother's First Name	ELLA
Mother's Middle Name	
Residence	MOAB GRAND COUNTY
Reported By	MRS. SARAH JANE STEWART
Line Number	2

Print? ☐ Close

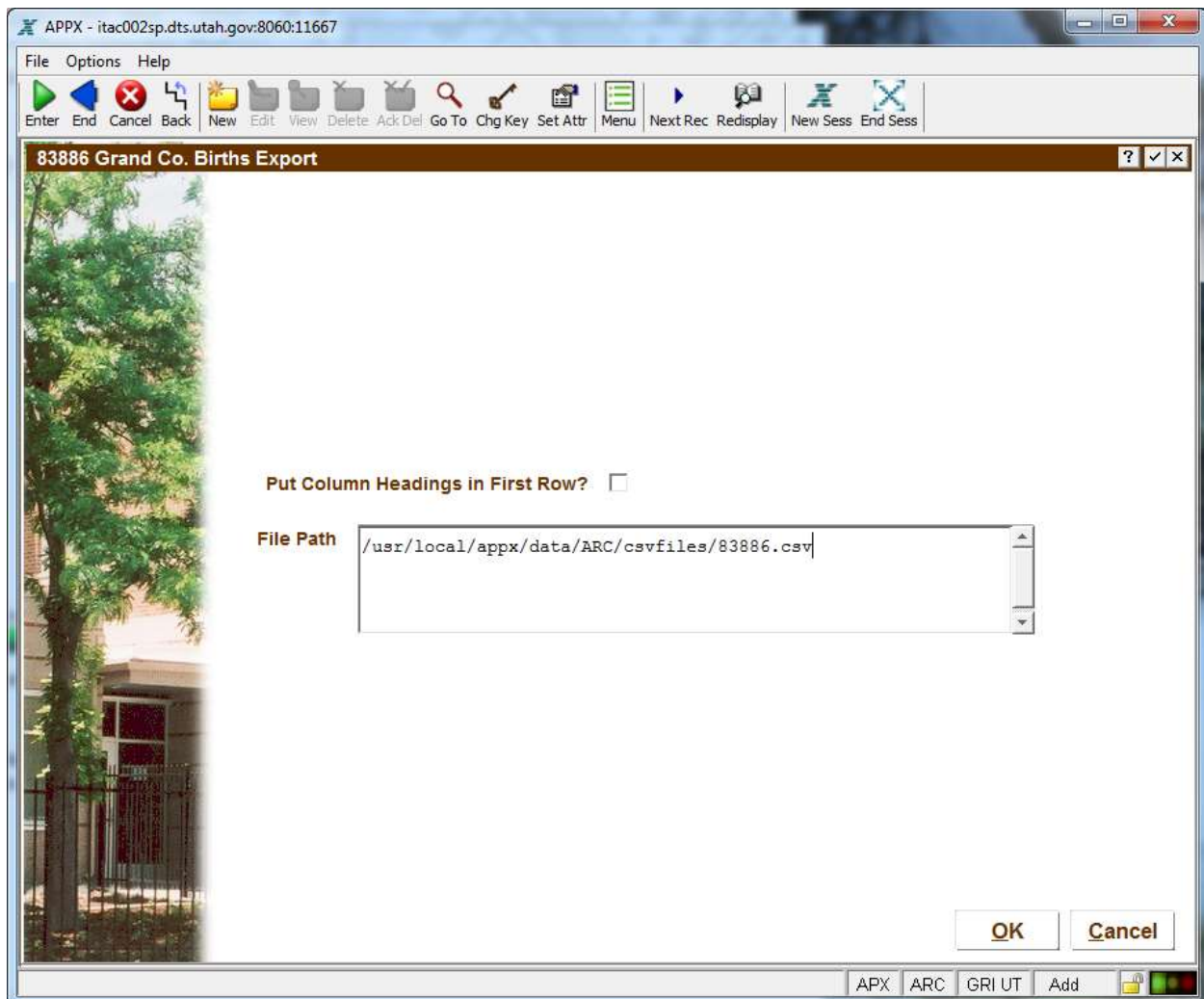
Press F10 To View Display Options

10:35 AM

The data imported cleanly. Click Cancel to return to the Maintain Indexes screen.

Click Export to get a spreadsheet back.

The export screen needs you to provide a file name at the end of the path name. Without providing a file name, you will receive an error when it tries to export. The file will be exported to the server but not copied to the desktop.



Click Cancel to return to the Maintain Indexes screen. The Name Ndx button creates a cross-reference file between any given name in the multi-series index and the series and record in question. Clicking that button runs an update process, but keeps you on the same screen. If there is a Solr index created, then the Rebuild Solr and Delete Solr options will be enabled.



Click the Maintain button.


APPX - itac002sp.dts.utah.gov:8060:928

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

83886 Grand Co. Births Maintenance ? ✓ ✕

 Record ID 
Page Number
Birth Date
Sex
Race of Child
Color of Child
Father's Last Name
Father's First Name
Father's Middle Name
Mother's Last Name
Mother's First Name
Mother's Middle Name
Residence
Reported By
Line Number
File Name
Birth Year
Birth Month
Birth Day
URL

APX ARC GRI UT Inq/Key 


Click OK to bring up the first record.

APPX - itac002sp.dts.utah.gov:8060:928

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

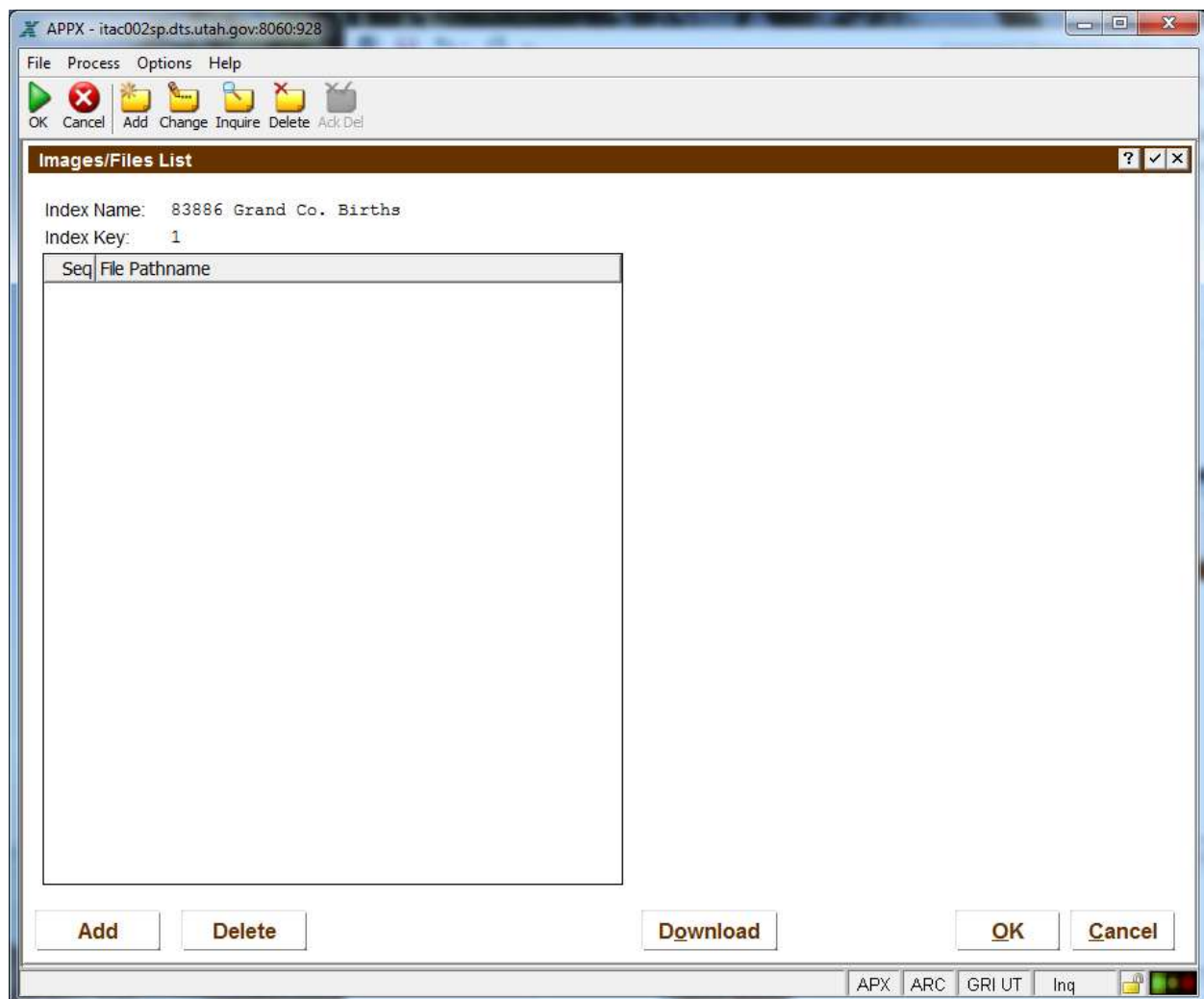
83886 Grand Co. Births Maintenance ? ✓ ✕

	Record ID	1
	Page Number	2
	Birth Date	04/02/1898
	Sex	M
	Race of Child	CAUCAUSIAN
	Color of Child	WHITE
	Father's Last Name	TAYLOR
	Father's First Name	SANFORD
	Father's Middle Name	A
	Mother's Last Name	TAYLOR
	Mother's First Name	EDITH
	Mother's Middle Name	E
	Residence	MOAB GRAND COUNTY
	Reported By	MRS. SARAH JANE STEWART
	Line Number	1
	File Name	83886-2600 12
	Birth Year	1898
	Birth Month	4
	Birth Day	2
	URL	83886-2600 12.jpg

[Files/Images](#) OK Cancel

APX ARC GRI UT Inq

Click Files/Images.



To add an image associated with this record, click Add.

APPX - itac002sp.dts.utah.gov:8060:928

File Options Help

OK Cancel Add Change Inquire Delete Ack Del

Images/Files List ? ✓ ✕

Index Name: 83886 Grand Co. Births
Index Key: 1

Seq	File Pathname
NDX00001	

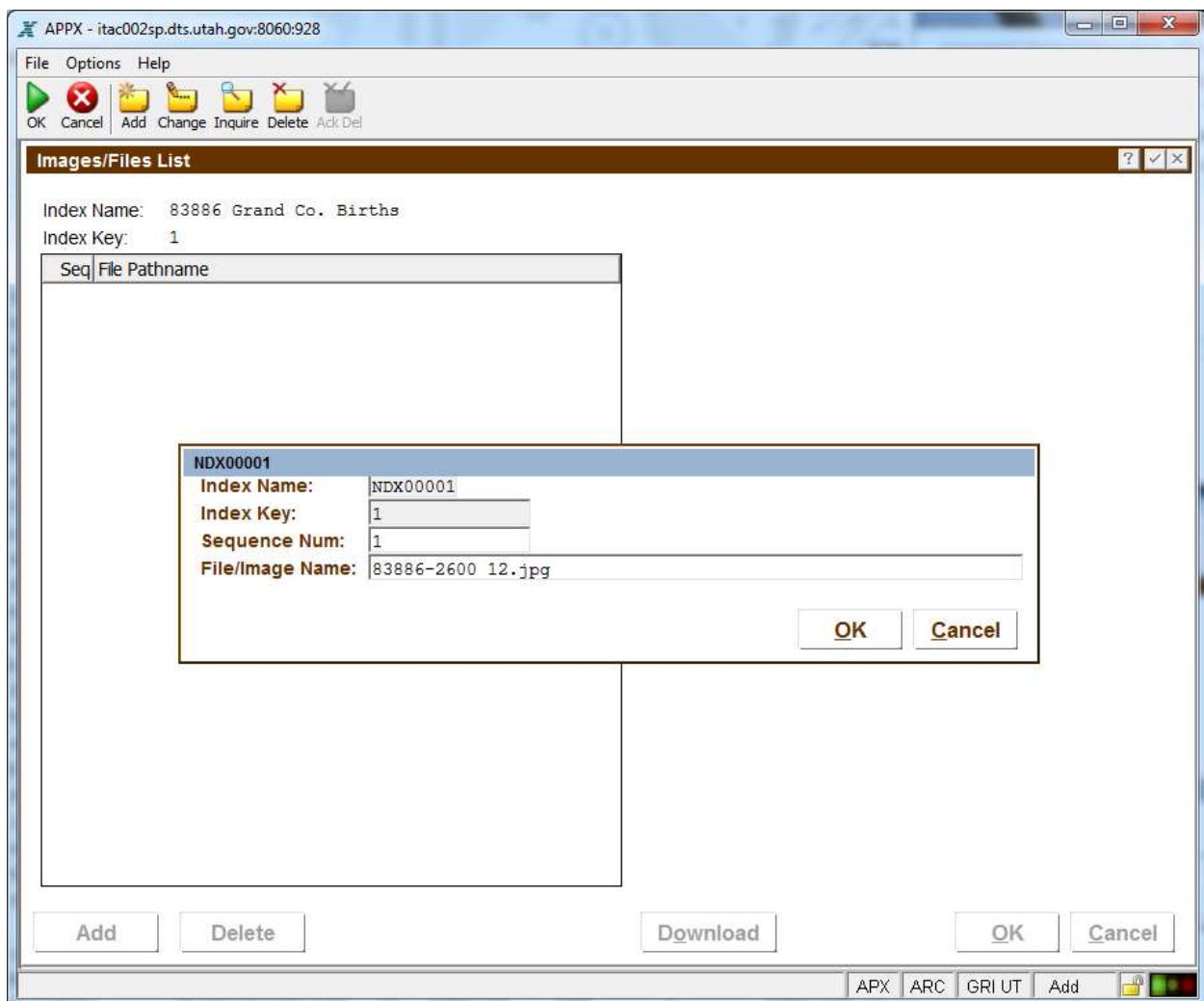
Index Name: NDX00001
Index Key: 1
Sequence Num:
File/Image Name:

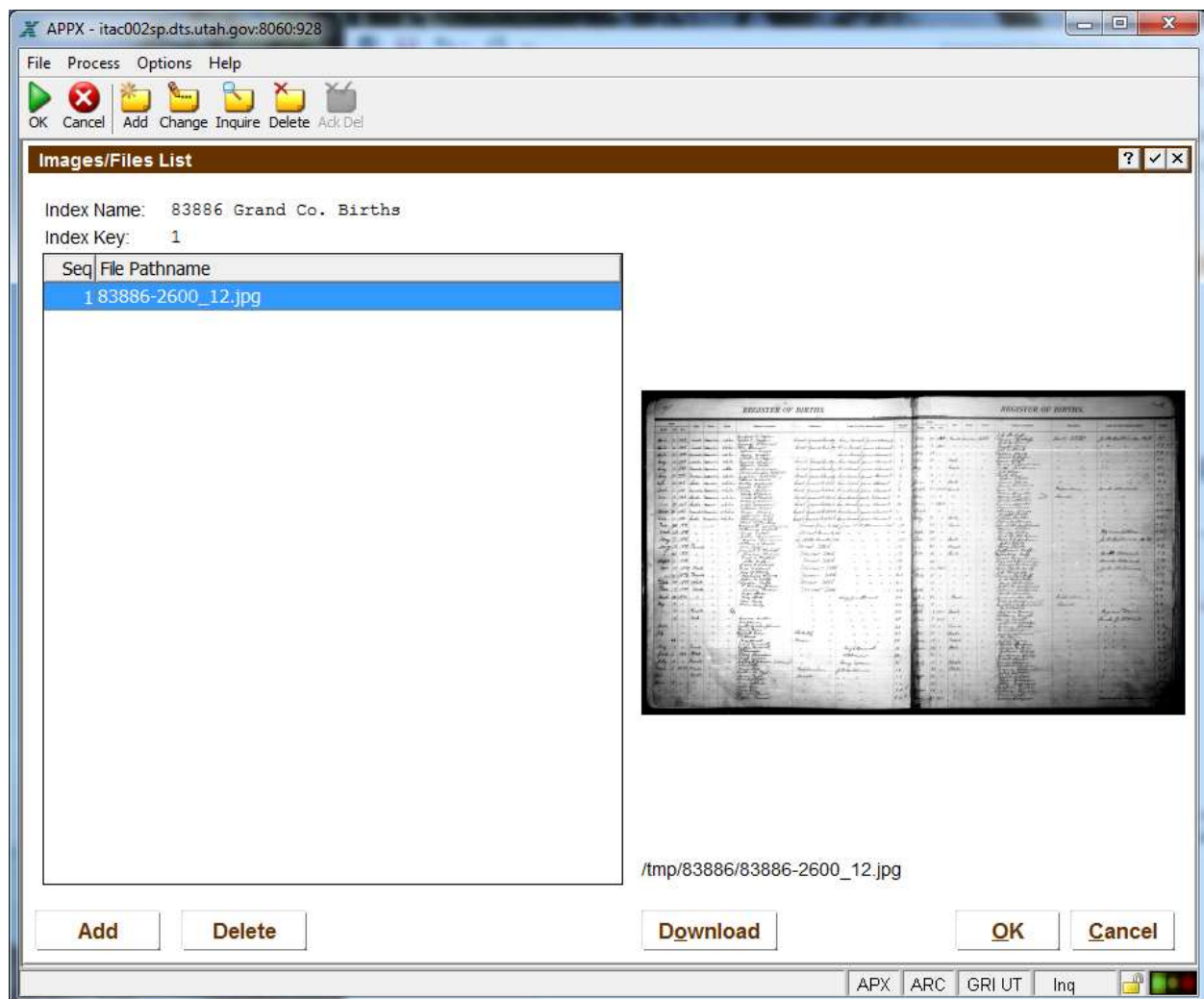
OK Cancel

Add Delete Download OK Cancel

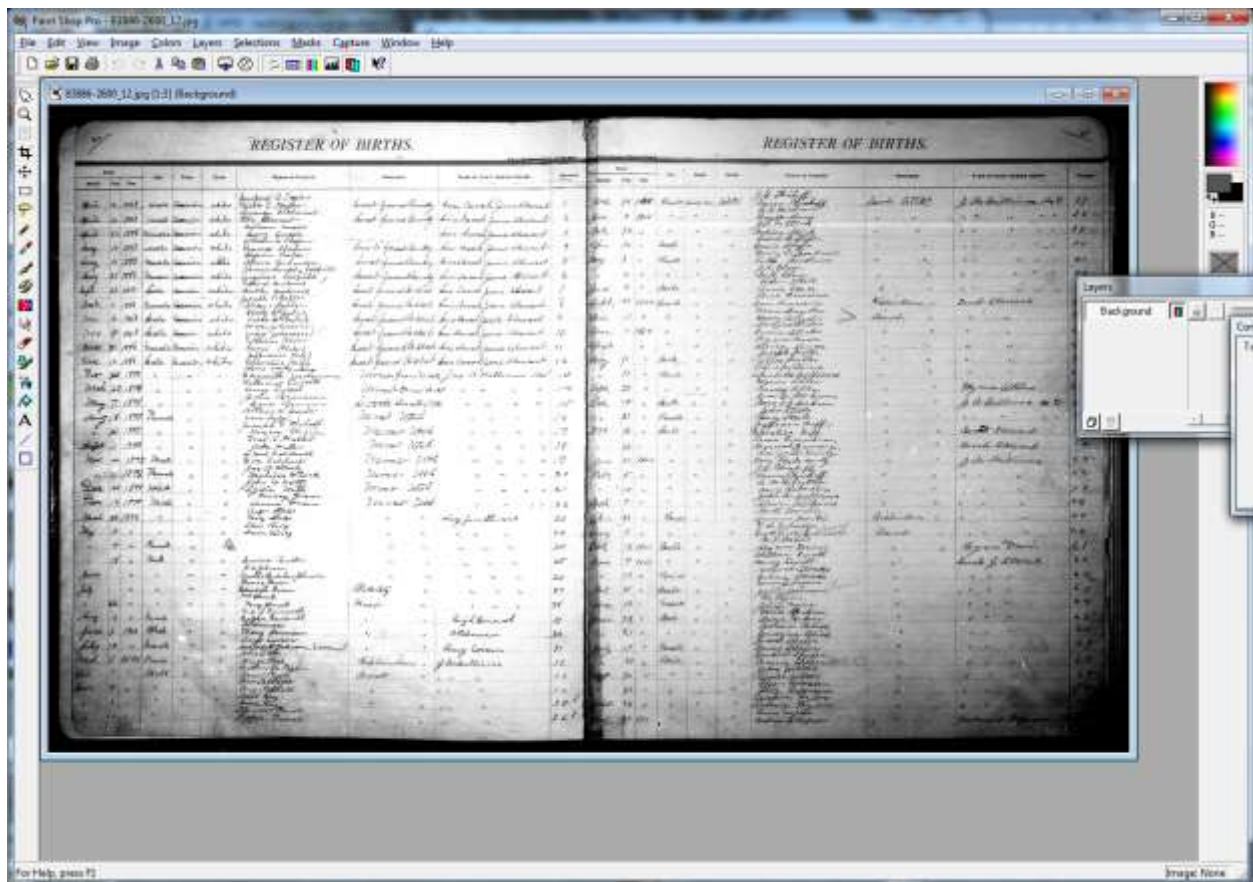
APX ARC GRI UT Add

The Sequence Number is the order in which the images appear for this index entry. If there is only one image, then the sequence number value is 1. The File/Image name is the file name (not the whole path, which is contained in a parameter value) to the image. Click OK to save your changes or Cancel to return to the previous screen.





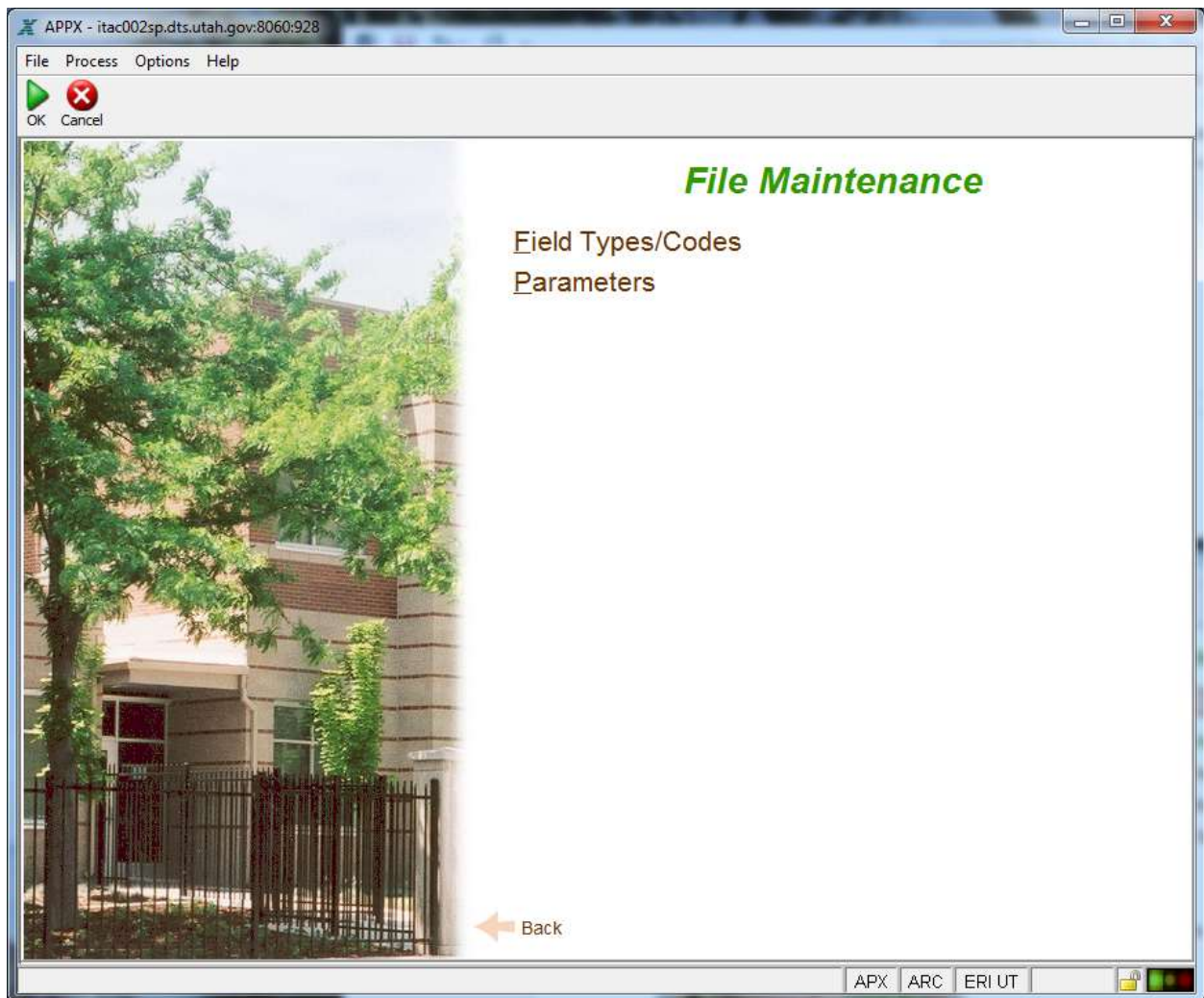
To download the file, click Download. The file will be sent to your desktop and opened using the default software you have associated with that file type.



Click Cancel to return to the Maintain Indexes screen. Click Cancel again to return to the Index Entry Menu.

Click File Maintenance Menu:





Click Field Types/Codes.

APPX - itac002sp.dts.utah.gov:8060:928

File Field Codes Options Help

OK Cancel Add Change Inquire Delete Ack Del Print

Field Codes Maintenance

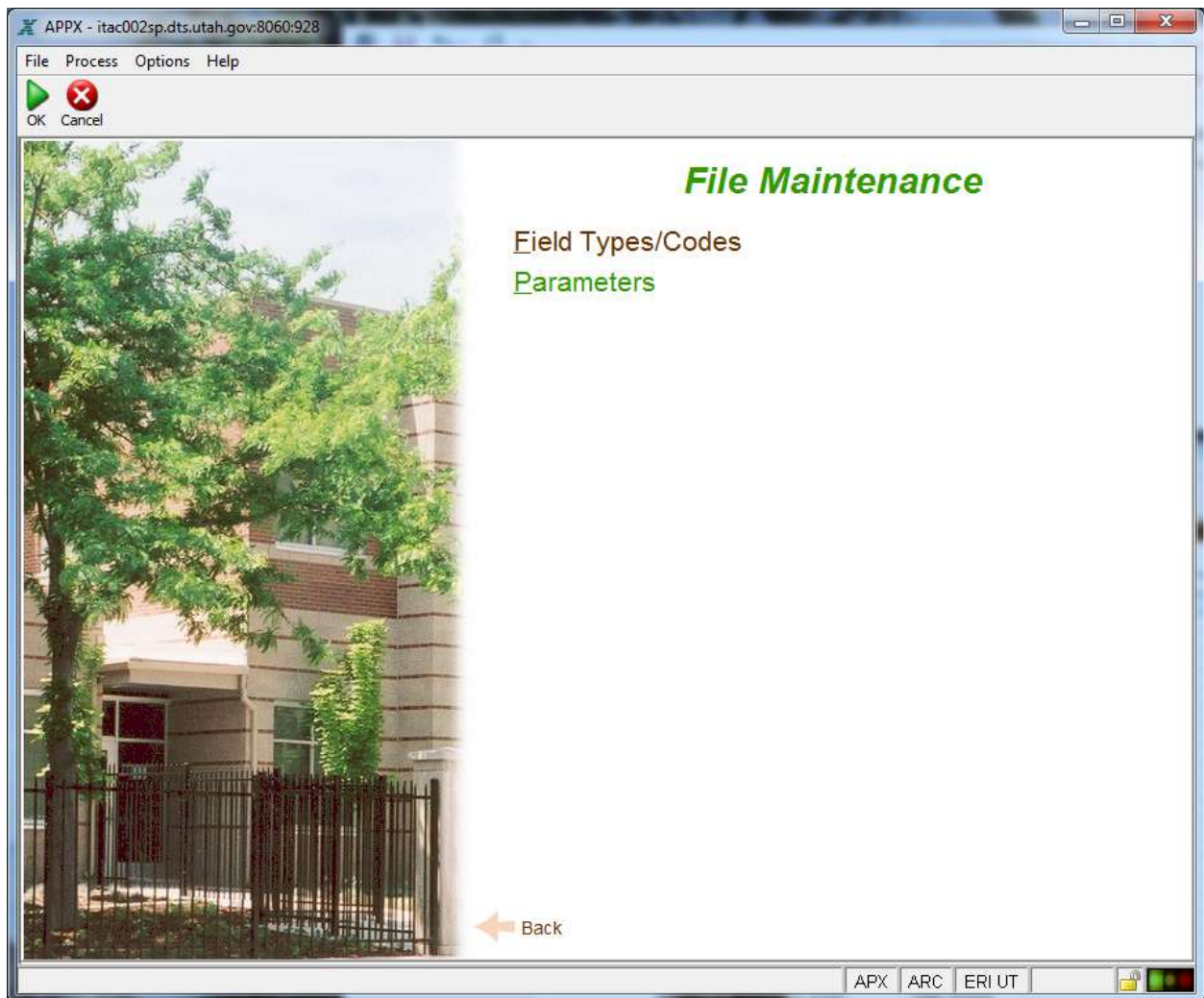
Field Type	Field Code
ALPHA	COLOR
ALPHA	CRIME
ALPHA	DATE
ALPHA	FATHER FIRST
ALPHA	FATHER LAST
ALPHA	FATHER MIDD2
ALPHA	FATHER MIDD3
ALPHA	FATHER MIDD4
ALPHA	FATHER MIDL
ALPHA	FILE NAME
ALPHA	LINE
ALPHA	MOTHER FIRST
ALPHA	MOTHER LAST
ALPHA	MOTHER MAIDN
ALPHA	MOTHER MIDD2
ALPHA	MOTHER MIDD3
ALPHA	MOTHER MIDD4
ALPHA	MOTHER MIDL
ALPHA	NAME
ALPHA	NAME FIRST
ALPHA	NAME LAST
ALPHA	NAME MIDDLE
ALPHA	NAME MIDDLE2

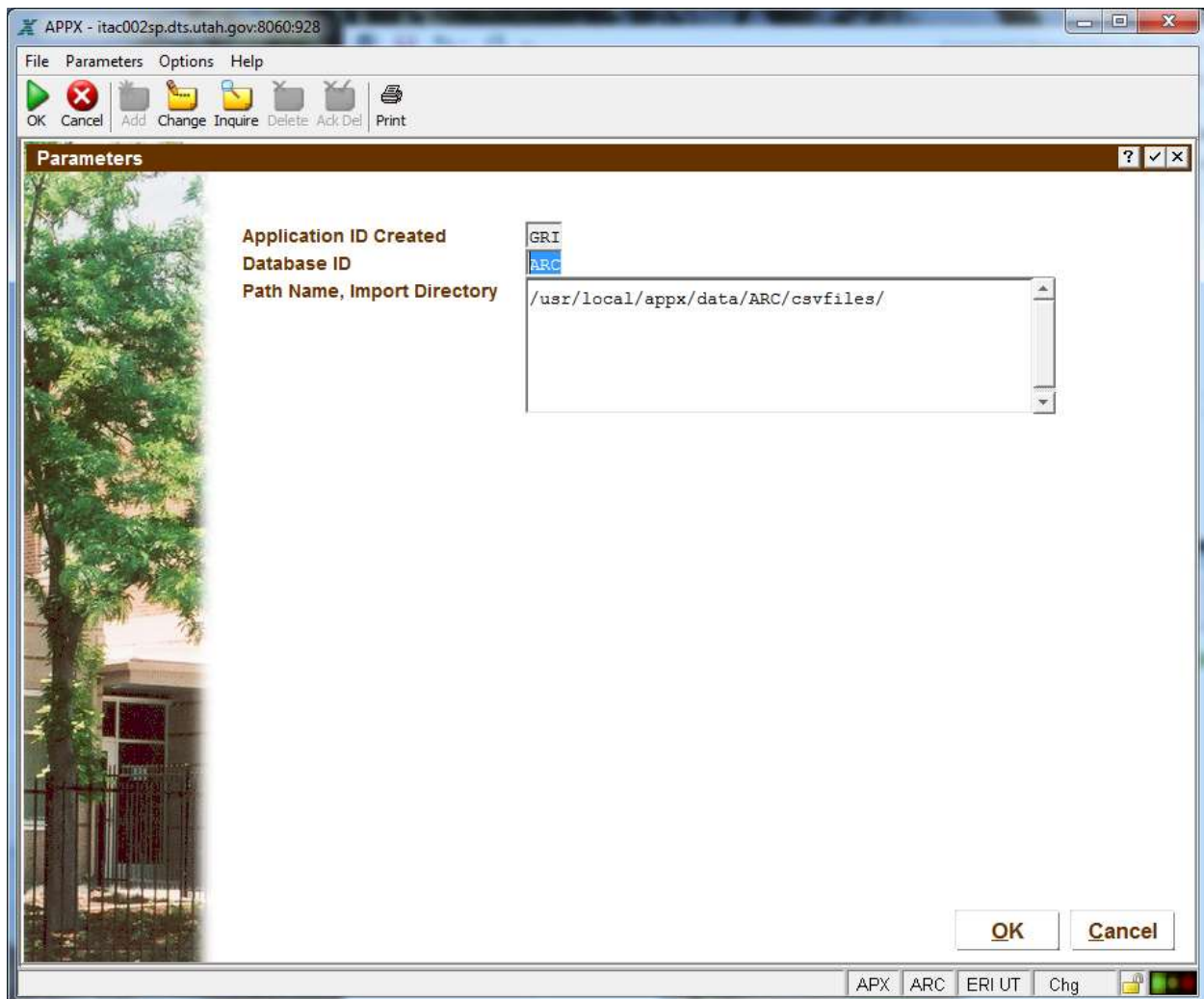
OK Cancel

APX ARC ERI UT Inq

For every generic type of field that may be found in an index, create an entry. Includes field type (alpha, date, numeric, logic, text), and field code (which becomes part of the field name). Without this data being entered first, you can't add a field of this type and name/code in the index itself. Click OK to save your changes, or Cancel to return to the File Maintenance Menu.

Click Parameters.



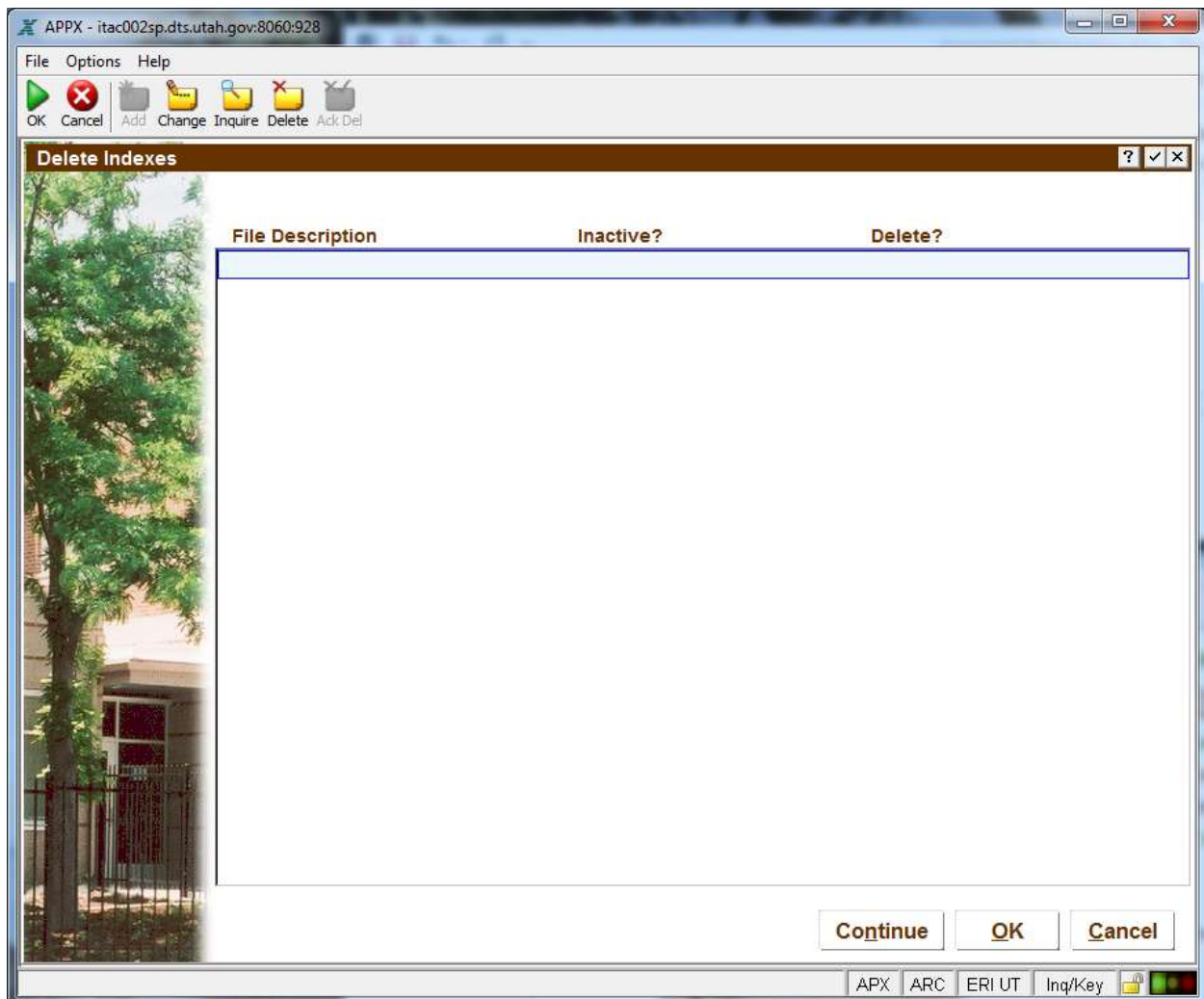


The application that stores the generated indexes is called GRI, which is the default value for the Application ID Created field. The Database ID field is the AXAEM database name, in this case ARC. The Path Name Import Directory is the location on the server where new .csv index files are uploaded so the application can find and parse them. Click OK to save your changes, or Cancel to return to the menu.

Click Back or Cancel to return to the Index Entry Menu.

To delete an entire index from the database, click Delete Index and Related Items.



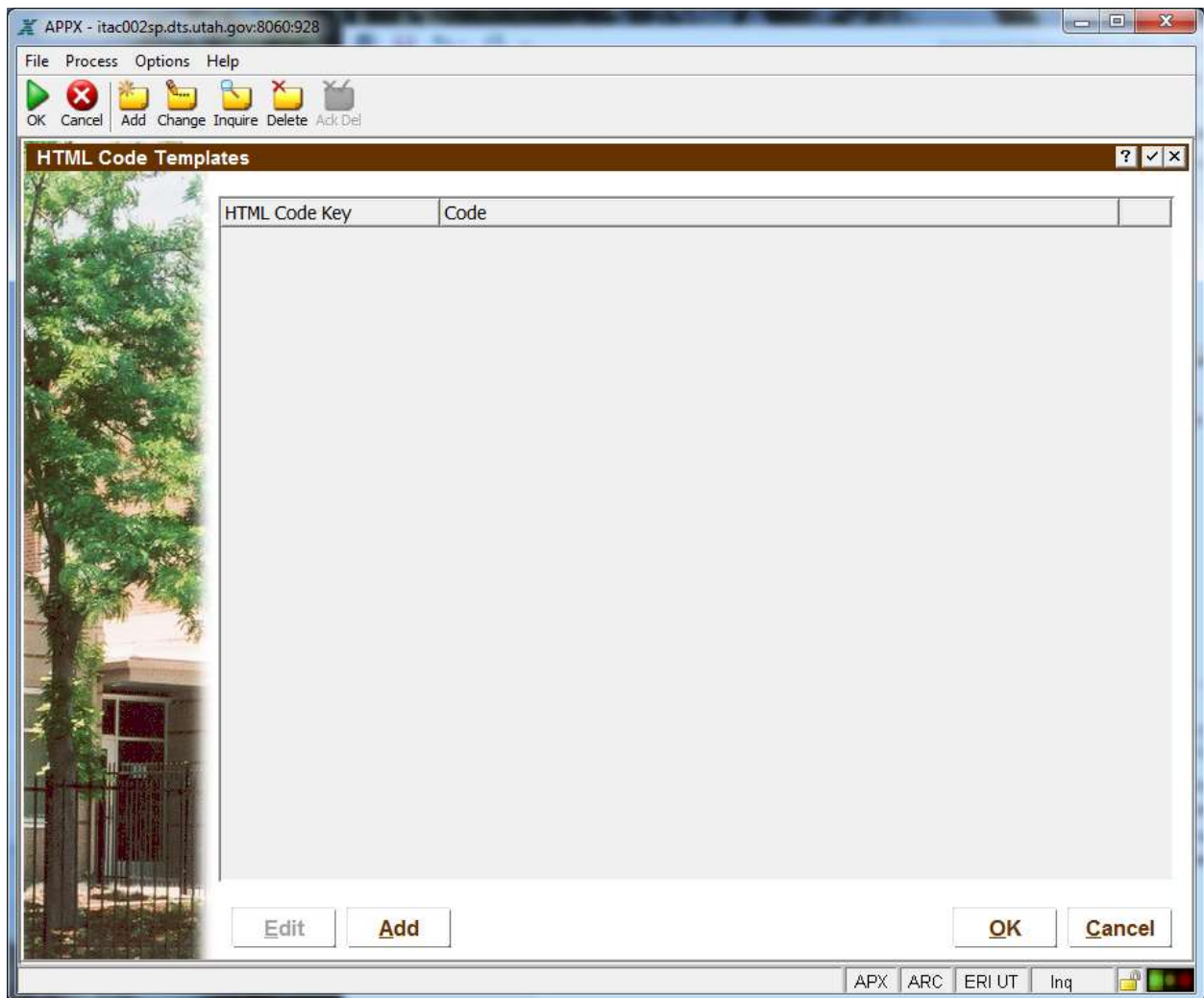


It appears it runs the delete before it asks you which index you want to delete. At the time this was run, there was only one index, but it didn't get deleted. If individual index fields had been marked for deletion, they would have been deleted.

Hidden Menu Options

What currently is not displayed on the menu, but exists in background, are ways to control the HTML display of indexes, instructions for searching indexes, and viewing web requests.

To edit HTML, click Option 2 on the keyboard (i.e. `2).



Click Add.

APPX - itac002sp.dts.utah.gov:8060:928

File HTML Codes Options Help

OK Cancel Add Change Inquire Delete Add Del Print

HTML Code Templates

Internet Template

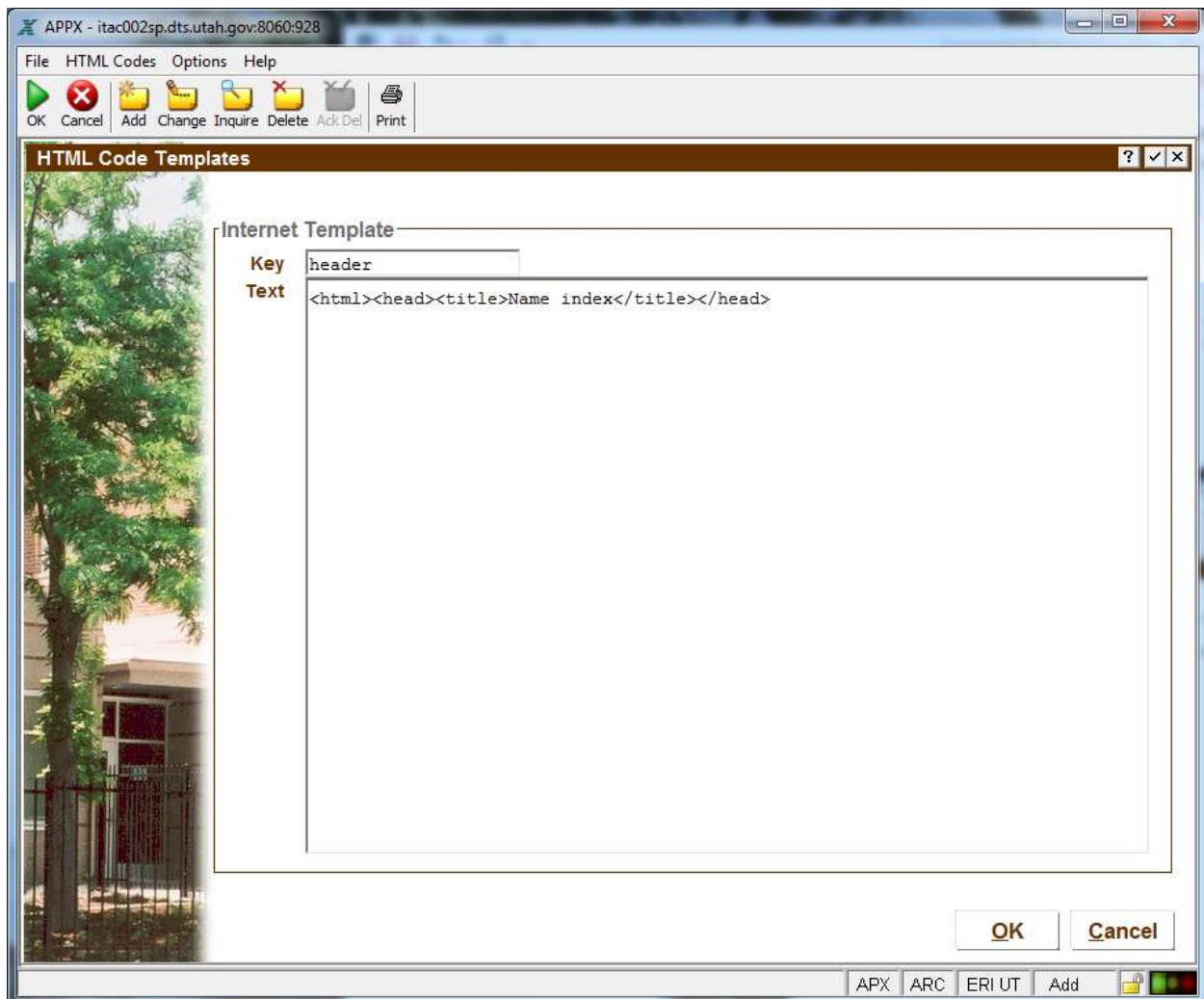
Key

Text

OK Cancel

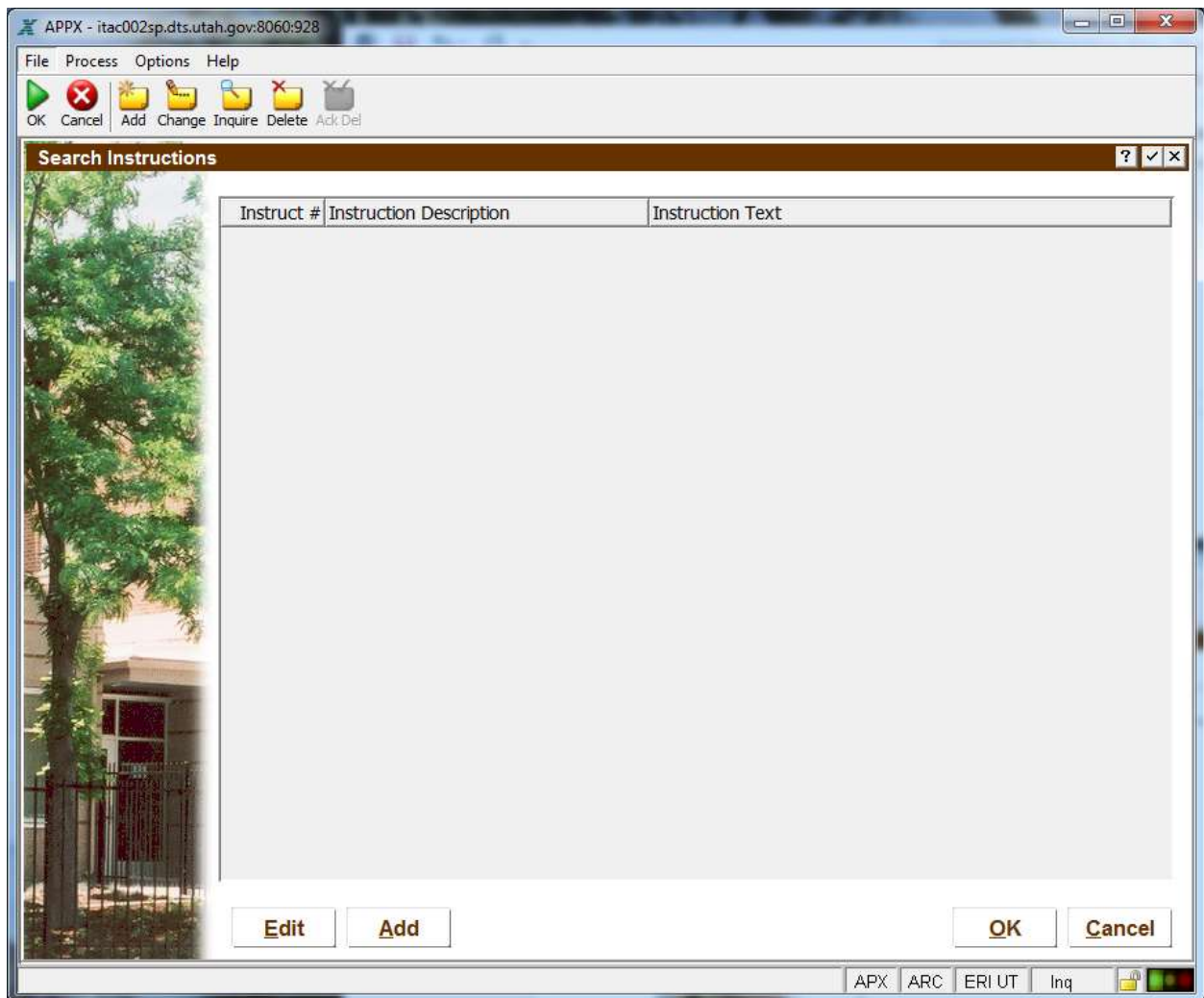
APX ARC ERI UT Add

Type a name for the template key, which can be referenced by programming. For instance, header.

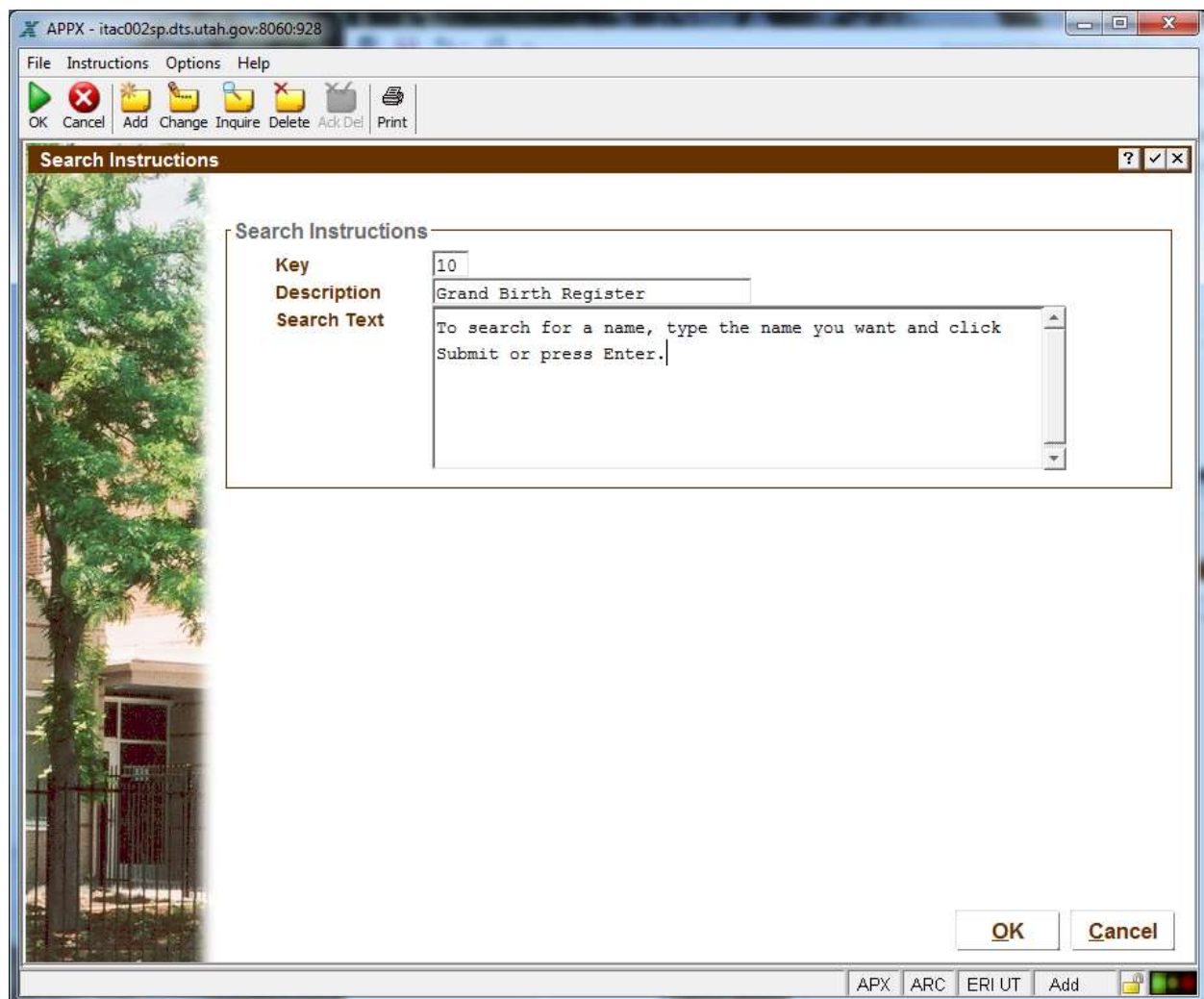


Click OK to save your changes or Cancel to return to the previous screen. Click Cancel again to return to the Index Entry Menu.

To edit instructions, choose Option 3 (i.e. `3).

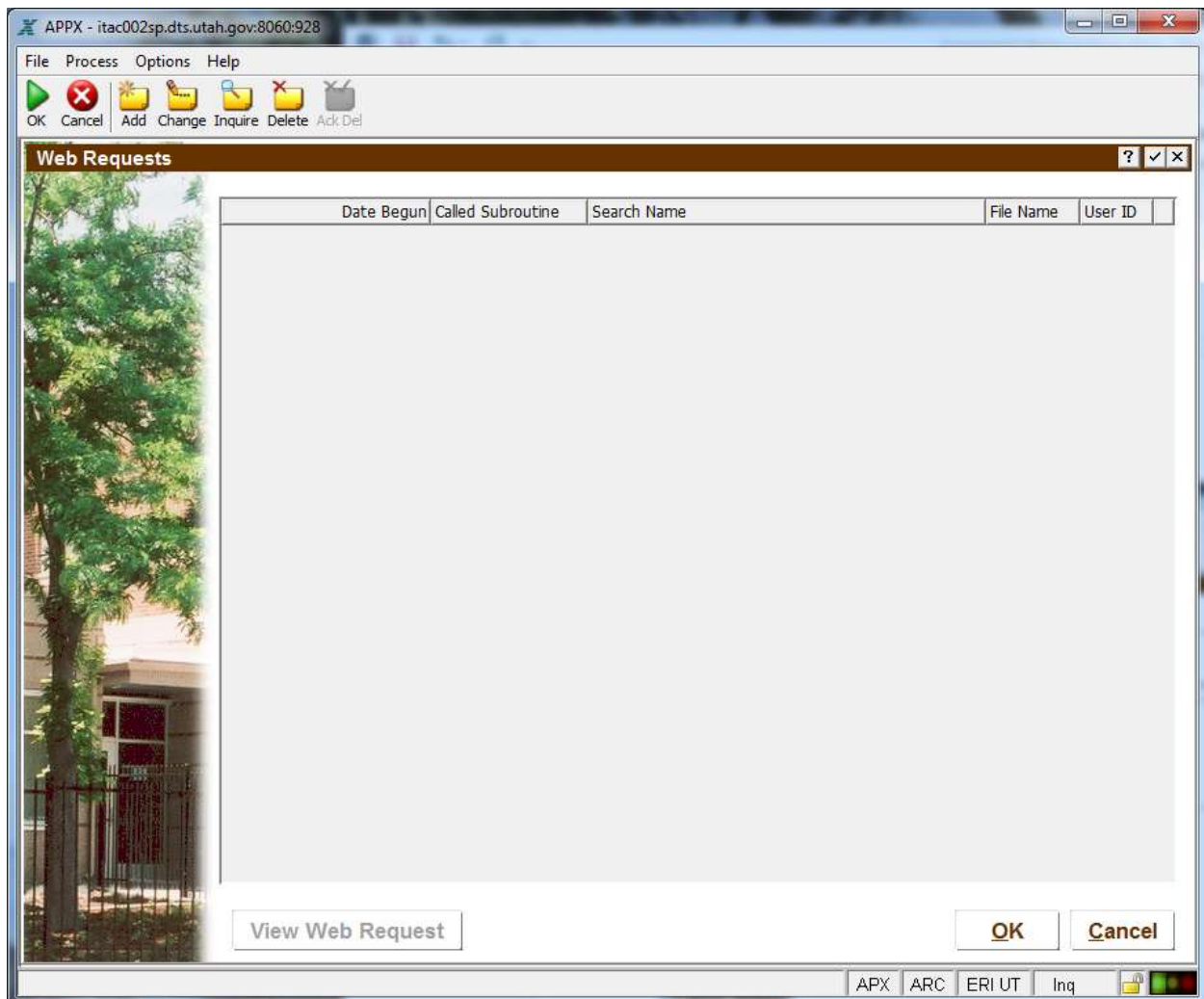


Click Add.



Click OK to save your changes, or Cancel to return to the previous screen. Click Cancel again to return to the Index Entry Menu.

To view web requests associated with the name indexes, click Option 4 (i.e. `4).



Each web request will be listed here, and the data is available for statistical purposes.

To purge web requests, if the file starts to get too big, from the Index Entry Menu, click Option 33 (i.e. ``33).