OLIVIA
Reference Guide
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1. RECORD TYPES

1.1. Six main record types

1. **Work records** describe an original work (e.g. sculpture, building, painting, print, photograph, etc.). The work described may or may not be held by the repository entering the record.
   
   Work record examples:
   - Leonardo’s painting “Mona Lisa”
   - an advertising trade card in the Business School collection
   - sculpture by Pablo Picasso in the Museum of Modern Art
   - a Greek vase

2. **Group records** are used to describe groups of works which may be commercially produced as a set; exist as an intellectual set (e.g., a group made by the artist/photographer/architect); deliberately grouped together for other reasons (e.g., a folder of photographs from an archival collection).
   
   Group record example:
   - an album of photographs by the photographer Hedda Morrison

3. **Site records** are used to describe the content of the built environment (e.g., cities, buildings, complexes, landscape architecture, archaeological sites). Site records also function as site authorities.
   
   Site record examples:
   - St. Peter’s in Rome
   - Frank Lloyd Wright’s “Fallingwater”

4. **Surrogate records** describe items that depict works, sites, or groups. Surrogate records are not used alone, but are linked to work, site or group records. The work or site record contains information about the “original” item being cataloged, while the surrogate record contains information about the representation (i.e., the slide or photograph) of that item.
   
   Surrogate record examples:
   - a photograph of the Empire State Building
   - a slide of Leonardo's "Mona Lisa"
   - a slide showing a detail of an architectural drawing

5. **Name Authority records** (also referred to as simply Name) are used for all names appearing in OLIVIA. They are used to establish an authorized version of an individual or corporate name. Name records are linked to work, site, group or surrogate records.
   
   Name record examples:
   - an artist’s name: Georgia O’Keeffe
   - name of a museum which owns a work: National Gallery of Art in Washington
   - name of a corporation involved in the production of a work/site: I.M. Pei & Partners
• name of a portrait sitter: Gertrude Stein

6. **Image Source** records identify the source of a surrogate image. They can describe edition, publication, and other bibliographic data as well as vendor and donor information about an image. This information can be used to relocate or reuse an image, or to validate its source. Image Source Records can be linked to work, site, group, or surrogate records.

   Image source record examples:
   • a book from which a slide was photographed
   • the name of a company which sold the repository a photograph or slide
1. RECORD TYPES

1.2 Record types and their relationship to each other

The diagram below provides a summary of the 6 main types of records in OLIVIA and their relationships to one another.

**GROUP RECORD**
- Describes a group of works
- May have multiple Work, Site, and Name records linked to it
- Example: album of photographs of China

**WORK RECORD**
- Describes an original visual work
- May have one or more Surrogate records linked to it or none
- May have a Group or Site record linked to it.
- Examples: Picasso's Guernica; an advertising poster

**SITE RECORD**
- Describes content of the built environment
- May have one or more Surrogate records linked to it or none
- May have a Work or Group record linked to it.
- Examples: the Taj Mahal; the Golden Gate Bridge

**NAME AUTHORITY (NAME) RECORD**
- Personal/corporate/institutional names associated with a record.
- May have multiple records linked to it
- Example: Pablo Picasso; Boston Museum of Fine Arts

**SURROGATE RECORD**
- Describes representations of visual works
- Must be linked to a work, site or group record.
- Example: slide of Picasso's Guernica,

**SURROGATE RECORD**
- Describes representations of the built environment
- Must be linked to a site, work or group record.
- Example: slide of the Taj Mahal

**IMAGE SOURCE RECORD**
- Identifies the source of a surrogate
- Must be linked to a surrogate, work, site or group record.
- Example: a slide of Picasso's Guernica for a particular surrogate record comes from the book, "Picasso's Guernica; the genesis of a painting"
2. MATERIAL FORMATS

There are two major material formats that are cataloged in OLIVIA: original works and representations of works and sites known as "surrogates."

2.1 Original Works

Original works are objects or works that a repository owns, such as a sculpture, a painting, or a trade card.

An example:

You are cataloging a baseball card which is held in your collection.
- You have the actual card, but you do not have any representations of it (that is, you don’t have slides or photographs of it, you only have the original).
- In OLIVIA, this would be cataloged as A WORK RECORD.

Other examples:
- Trade card owned by the Harvard Business School = original work
- Daguerreotype owned by Houghton Library = original work
- Slide of Empire State Building owned by the Harvard Design School does not equal original work
- Slide of a Sargent painting owned by the Fine Arts Library does not equal original work

2.2 Representations of Works and Sites (Surrogates)

Often a repository does not actually own the work or site, but representations of a work or a site in the form of slides, photographs, or some other visual representation.

Examples:

You are cataloging a slide which shows the Massachusetts State House.
- In OLIVIA, built works are cataloged in site records, so you would create a site record for the State House.
- A surrogate record describing the slide would be linked to this site record.
- Thus, in OLIVIA, this would be cataloged as A SITE RECORD WITH A SURROGATE

You are cataloging a slide which shows a detail of the Mona Lisa.
- In OLIVIA, objects or pieces of art are cataloged as work records, so you would create a work record for the Mona Lisa.
- You would then create a surrogate record describing the slide of the detail of the Mona Lisa and link this to the work record.
- Thus, in OLIVIA, this would be cataloged as A WORK WITH A SURROGATE
3. WORK RECORD

3.1 Basic Info
Entry screen for basic information regarding the work being cataloged. Field use will be determined by the local cataloging guidelines of a repository.

**Work title:** title, identifying phrases or names given to a work. Note: This field is mandatory for saving the work record.

**Alternate title and title type:** a repeatable field of other titles the work is known by (e.g. translations, series, formerly known as).

**Start Year:** work start date expressed only by year. Note: if a work has only one year, the year is entered both in the "Start Year" and "End Year" fields.

**End Year:** work end date expressed only by year.

**Date description:** text field for additional description of a date, e.g. May 1993. Also includes non-precise prose dating, such as ca., fl., 19th century, etc.

**Work type:** a repeatable field which is a controlled pick list of authorized work types used to define the type of work you are cataloging (e.g. painting, sculpture, video art, ethnographic views).

**Country:** Non-functioning field, i.e. no longer in service.

**Dimensions:** information about the size, shape, scale, and dimension of a work.

**Culture:** a repeatable field which is a controlled pick list of cultures, this field is often used for designating from what culture this work comes

**State/Edition:** for books, the publication date; for prints, the variant stages of development of graphic and textual works.

**Description:** text field which allows further description of the work based on the discretion of a cataloger.

**VIA box:** checked when the record is ready to be sent to VIA. Only authorized catalogers can check this box.
3. WORK RECORD

3.2 Surrogates
Provides access to entry screens for the creation and retrieval of surrogate records. This screen also allows users to link and unlink surrogates and make an image the primary image to display with the work record.

**View Surrogate:** provides access to a surrogate record. A surrogate record must be highlighted before clicking on this button.

**New Surrogate:** provides a blank surrogate record.

**Use Template:** access point to retrieve a template for surrogate records. See section 9. TEMPLATES for more information about templates.

**Link Surrogate:** links an existing surrogate record which has an accession number.

**Unlink Surrogate:** removes the surrogate record from the work record.

**Primary Image:** links a thumbnail image of a surrogate to represent the whole work record.

**Clear Image:** removes the thumbnail image of a surrogate as the primary image.
3. WORK RECORD

3.3 Names, Sites & Groups
Provides access to entry screens where name, site and/or group records are linked to a work record. The relationship of the work to the other records is also established.

A. Names: Name(s) associated to the work, e.g. the artist of the work, the institution/company who own the work or a particular person depicted in the work.

View Name: provides access to the Name record that is linked to the Work record

Link Name: links an existing name record and also allows users to create a new Name record. Upon clicking this button, the Work Name Relationship screen appears.

1. Work Name Relationship: section where you link a name and establish its relationship to the work (e.g. artist of the work).
   a. Last Name/Institution: Name record to be linked. For personal names, the last name is only entered to access a name record. If a last name has more than one record (e.g. there are 3 name records with the last name "Picasso"- Pablo Picasso, Lola Picasso, Claude Picasso"), a listing will appear from which you can select the appropriate name.
   b. Relationship: designates the relationship of the name to the work being cataloged. There are four main types of relationships:
      associated names
      creator
      production
      repository

   The following fields are only accessible when there is an entry in the Relationship field.
   c. Role: controlled pick-list that specifies the exact role of the name, e.g. artist of the work.
   d. Attribution: controlled pick-list that specifies the type of attribution to the name (e.g. School of, Manner of, Attributed to, etc.) This field is only available when "creator" is selected in the Relationship field.
   e. Repository ID: usually identifies the accession number of the object from a particular repository. This field is only available when "repository" is selected in the Relationship field.
   d. Notes: text field for additional information about a name.

Unlink Name: removes a linked name record from the work record

Modify Name Relationship: allows user to change information in the Relationship, Type, Attribution, and Notes fields of the "Work Name Relationship" screen.

Make Display Name: designates what will appear in the "Display Name" field located at the top of the work record screen. The default display name is the 1st name entered in the Names section. The display name field is a read-only field, i.e. direct changes can
not be made in the field but must be made either through selecting the "Make Display Name" or "Clear Display Name" buttons.

Clear Display Name: Removes the name entered in the Display Name field.

B. Sites: Site(s) associated to the work, e.g. a particular building such as Fallingwater, monuments, site specific shrines, complexes, landscape architecture, streets, cities and neighborhoods or countries.

View Site: provides access to the site record linked to the work record. The site record desired must be highlighted before it can be viewed.

Link Site: links an existing site record and also allows users to create a new Site record if a site is not established yet. Upon clicking this button, the Site Relationship screen appears.

1. Work Site Relationship: section where you link a site and establish its relationship to the work (e.g. place of production).
   a. Site Name: Site record to be linked.
   b. Relationship: designates the association of the name to the work being cataloged. There are three main types of relationship:
      associated sites
      location
      production
   c. Type: controlled pick-list that specifies the exact role of the site (e.g. place of production). This field is only accessible when the Relationship field is filled out.

Unlink Site: removes the linked site record from the work record.

Modify Site Relationship: allows user to change information on the "Work Site Relationship" screen.

C. Groups: Group record(s) associated with the work record.

View Group: provides access to the group record linked to the work record. The group record desired must be highlighted before it can be viewed.

Link Group: links an existing group record and also allows users to create a new Group record. Upon clicking this button, the Work Group Relationship screen appears.
   a. Group Title: Group record to be linked
   b. Sequence #: a numerical value assigned to an individual work record in the context of a group record. For example, a group record of a Chinese album of photographs may have multiple work records, i.e. the album consists of many photographs. These photographs may have an assigned number based on the order of appearance within the album. The Sequence # is the number assigned to a particular photograph (work record).
3. WORK RECORD

**Unlink Group:** removes a linked group record from the work record.

**Modify Group Relationship:** allows user to change information on the "Work Group Relationship" screen.

### 3.4 Notes & Numbers

Entry screen for additional textual information regarding the work. There are 8 types of Notes field:

- General
- Icon
- Inscription
- Materials and Techniques
- Provenance
- Related Site(s)
- Subject
- Transferred Information
- Copyright

Note: All Notes fields map to VIA except for the “Transferred Information” field.

**Associated Number:** a number associated with the work usually from an outside source. For example, a catalogue raisonné.

**Type:** the source of the associated number. For example, the name of the catalogue raisonné.

### 3.5 Access Terms

Entry screen for additional descriptive information.

**Style/Period:** a repeatable field of cultural, historical and chronological dimensions including art movements, dynasties, reigns and ages.

**Materials and Techniques:** a repeatable field of the materials of which a work is composed and the processes, techniques or methods used.

**Index terms:** a repeatable field used for indexing subject matter including genre terms, e.g. landscape, portrait.
3. WORK RECORD

3.6 Local & Related Info
Provides access to entry screens for creating a record of local information relating to a work, as well as records of related works and information about the works.

**View/Modify Local Information Record:** provides access to the Local Work Information record screen.

- **Classification:** unique code(s) assigned to a work or representation of an object or site. Codes are determined by a repository.

- **Accession #:** unique number assigned to a work. Numbers are determined by a repository.

- **Accession Date:** date of the accessioning of the work.

- **Image Source:** source of the representation of a work or site
  - **Volume:** volume of a publication
  - **Issue #:** issue of a publication
  - **Year:** year of publication
  - **Page #:** page where image is found

- **Formats Available:** specifies the various formats of the work

- **Associated ID:** unique code(s) assigned to a work. Codes are determined by a repository.

- **VIA Notes:** additional information to appear in the VIA record.

- **In House Notes:** additional information which only appears in OLIVIA and not in VIA

- **Access Restrictions:** information regarding access information about the work (e.g. non-circulating photo, copyright restrictions).

**New Local Information Record:** access point to a blank Local Work Information record. A repository can have only one Local Work Information record per work record. But a work record of the "Mona Lisa" may have two or more Local Work Information records because each Local Work Information record comes from a different repository.

**Delete Local Information Record:** deletes the Local Work Information record from the Work record.

**Related Works:** identifies other works related to the work being cataloged which may or may not be in OLIVIA, e.g. studies for a work.
3. WORK RECORD

Related Information

**Description:** description of further information located outside of VIA, e.g. may link to a fuller metadata record in a repository's local system.

**Link:** the URL or URN link to related information.

3.7 Images

Provides access to Image records of the work which can be added, viewed or modified. One or more image records may be created. A link to an image file in the Harvard Digital Repository or in a local directory can also be created from this screen. For large numbers of images, the "Batch Image Processing" feature of OLIVIA should be used to link images to the related image record.

**View Image:** the image linked to the selected image record of the work is displayed in a separate window.

**Add Record:** access point to create an image record. Upon clicking this button, the Work Images screen appears with the following fields:

- **Caption/No:** text information about the thumbnail image, e.g. recto or verso view of a trade card.
- **Sequence:** the number entered here determines the order in which images will be displayed in the VIA record.
- Check boxes to restrict access to the image:
  - Image and Thumbnail restriction
  - In House Use

The View Image, Clear Image, and Link Image buttons on this screen have the same functions as the buttons of the same name described above and below.

**Modify Record:** access point to the Works Images screen to modify an image record.

**Delete Record:** deletes the selected image record from OLIVIA.

**Link Image:** allows users to link an image to be associated with the work record. The image record must be created prior to linking the image. The URL of the image should be entered here or through the Acquire from Repository button.

**Make Primary Image:** establishes a primary image associated with a work record in OLIVIA. In VIA, all images display with the image, unless restrictions have been entered into the image record.

**Clear Primary Image:** clears the image currently displayed in the work record in OLIVIA.
4. SITE RECORD

4.1 Basic Info
Entry screen for basic information regarding the site being cataloged. Field use will be determined by the local cataloging guidelines of a repository.

**Site Name**: a text field, for the title, identifying phrases or names given to a site.

**Alternate Site Name**: a repeatable text field, for other titles the site is known by (e.g. translations, series, formerly known as, etc.)

**Type (Alternate Site Name)**: a controlled pick list from which one can choose Site Alternate Name Types.

**Site Type**: a repeatable field which is a controlled pick list of authorized site types used to define the type of site you are cataloging.

**Culture**: a repeatable field which is a controlled pick list of approved terms to use for culture.

**Complex**: text field used for the name of the complex—usually a larger site which the site you are cataloging is part of, i.e. Gund Hall = site and Harvard University = complex.

**Complex Type**: a controlled pick list of approved terms to be used to define the type of complex.

**Start year**: site start date expressed in year.

**End year**: site end date expressed in year.

**Date Description**: a text field used for prose dating, such as ca., fl., 19th c., etc.

**City/Place**: a text field for geographic information – used for city or town information.

**State/Prov.**: a text field for state or province information.

**Country**: a controlled pick list, divided first by continent and then by country, from which you choose the country needed.

**Address**: a text field used for address information for the site.

**VIA checkbox**: check box which authorizes record to be sent to VIA.

**Display Name**: field which takes the Site Name, Complex Name, City/Place, State/Prov and Country information and shows you how it will look in VIA. This field can be edited to remove redundant information, such as duplicate names in Site Name and City/Place.
4. SITE RECORD

4.2 Names, Works & Groups
Entry screen where you link name, work or group records to a site record.

A. Names: Name(s) associated with the site, e.g. Frank Lloyd Wright is the architect of a site.

View Name: provides access to the name record linked to the site record. Must highlight desired name record then click “View Name.”

Link Name: links an existing name record and also allows users to create a new Name record. Upon clicking this button, the Site Name Relationship screen appears.
1. Site Name Relationship: section where you link a name and establish its relationship to the site (e.g. architect of the site).
   a. Last Name/Institution: Name record to be linked. For personal names, enter the person’s last name and choose their entry from the list. If they do not exist you may have to create the name record, see Section 6.
   b. Relationship: designates the relationship of the name to the site being cataloged. There are four main types of relationship:
      • associated names
      • creator
      • production
      • repository
      The following fields are only accessible when the Relationship field is filled out.
   c. Role: pick-list which specifies the exact role of the name (e.g. architect of the site).
   d. Attribution: pick-list which specifies the type of attribution to the name (e.g. School of, Manner of, Attributed to, etc.)
   e. Notes: text field for additional information about a name.

Unlink Name: removes a linked name record from the site record

Modify Name Relationship: allows user to change information in the Relationship, Role, Attribution, and Notes fields of "Site Name Relationship" screen.

B. Works: Work(s) associated with the site, e.g. a sculpture, mosaic, or tapestry that is an important element of the site.

View Work: provides access to the work linked to the site record. Must highlight desired work record to view.
4. SITE RECORD

**Link Work:** links an existing work record and also allows users to create a new **Work Record** if a work is not established yet. Upon clicking this button, the Site **Work Relationship** screen appears.

1. **Site Work Relationship:** section where you link a work and establish its relationship to the site.
   a. **Work Name:** Work record to be linked.
   b. **Relationship:** designates the association of the work to the site being cataloged. There is one type of relationship:
      - associated work

**Unlink Work:** removes the linked work record from the site record.

**Modify Work Relationship:** allows user to change information on the "Site Work Relationship" screen.

C. **Groups:** Group record(s) associated with the site.

**View Group:** provides access to the group record linked to the site record. Must highlight the desired group record to view.

**Link Group:** links an existing group record and also allows users to create a new **Group record**. Upon clicking this button, the Site **Group Relationship** screen appears.

   a. **Group Title:** Group record to be linked
   b. **Sequence #:** a numerical value assigned to an individual work record in the context of a group record. For example, a group record of a Chinese album of photographs may have multiple work records, i.e. the album consists of many photographs. These photographs may have an assigned number based on the order of appearance within the album. The **Sequence #** is the number assigned to a particular photograph (work record).

**Unlink Group:** removes a linked group record from the site record

**Modify Group Relationship:** allows user to change information on the "Site Group Relationship" screen.
4.3 Access Terms & Local Info

Entry screen for additional descriptive information and provides access to entry screens for creating a record of local information relating to a site.

**Style/Period:** a repeatable field of cultural, historical and chronological dimensions including art movements, dynasties, reigns, ages.

**Materials and Techniques:** a repeatable field of the materials of which a site is composed and the processes, techniques or methods used.

**Index Terms:** a repeatable field used for indexing subject matter including genre terms, e.g. landscape, portrait.

**View/Modify Local Information Record:** provides access to the Local Site Information record screen.

- **Classification:** unique code(s) assigned to a site or representation of an object or site. Codes are determined by a repository.

- **Accession#:** unique number assigned to a site or representation of an object or site. Numbers are determined by a repository.

- **Accession Date:** date of the accessioning of the site.

- **Image Source:** source of the representation of a work or site
  - **Volume:** volume of a publication
  - **Issue#:** issue of a publication
  - **Year:** year of publication
  - **Page#:** page where image is found

- **Formats Available:** specifies the various formats of the site.

- **Associated ID:** unique code(s) assigned to works or sites. Codes are determined by a repository.

- **VIA Notes:** additional information to appear in the VIA record.

- **In House Notes:** additional information which only appears in OLIVIA and not VIA.

- **Access Restrictions:** information regarding access information to the site. (e.g. non-circulating photo, copyright restrictions).
4. SITE RECORD

New Local Information Record: access point to a blank Local Site Information record. A repository can have only one Local Site Information record per site record. But, a site record of Sever Hall may have two or more Local Site Information records because each Local Site Information record comes from a different repository.

Delete Local Information Record: deletes the Local Site Information record from the site record.

4.4 Surrogates
Provides access to entry screens for the creation and retrieval of surrogate records. This screen also allows users to link and unlink surrogates and make an image the primary image to display with the site record. For more information about surrogate records, see SECTION 5. SURROGATE RECORD.

View Surrogate: provides access to a surrogate record. A surrogate record must be highlighted before clicking on this button.

New Surrogate: provides a blank surrogate record.

Use Template: access point to retrieve a template for surrogate records. See SECTION 9. TEMPLATES for more information about templates.

Link Surrogate: links an existing surrogate record which has an accession number.

Unlink Surrogate: removes the surrogate record from the site record.

Primary Image: links a thumbnail image of a surrogate to represent the whole site record.

Clear Image: removes the thumbnail image of a surrogate as the primary image.

4.5 Notes
Entry screen for additional textual information regarding the site. There are 8 types of Notes field:

- General
- Icon
- Inscription
- Materials and Techniques
- Provenance
- Related Site(s)
- Subject
- Transferred Information
- Copyright
4. SITE RECORD

Note: All Notes fields map to VIA except for the “Transferred Information” field.

4.6 Images
Provides access to image records of the site which can be added, viewed or modified. One or more image records may be created. A link to an image file in the Harvard Digital Repository or in a local directory can also be created from this screen. For large numbers of images, the "Batch Image Processing" feature of OLIVIA should be used to link images to the related image record.

View Image: the image linked to the selected image record of the site is displayed in a separate window.

Add Record: access point to create an image record. Upon clicking this button, the Sites Images screen appears with the following fields:

Caption/Note: text information about the thumbnail image

Sequence: the number entered here determines the order in which images will be displayed in the VIA record.

Check boxes to control access to the image:

Image and Thumbnail restriction
In House Use

The View Image, Clear Image and Link Image buttons on this screen have the same functions as the buttons of the same name described above and below.

Modify Record: access point to the Sites Images screen to modify an image record.

Delete Record: deletes the selected image record from OLIVIA.

Link Image: allows users to link an image to be associated with the site record. The image record must be created prior to linking the image. The URL of the image should be entered here or through the Acquire from Repository button.

Make Primary Image: establishes a primary image associated with a site record in OLIVIA. In VIA, all images display with the image, unless restrictions have been entered into the image record.

Clear Primary Image: clears the image currently displayed in the site record in OLIVIA.
5. SURROGATE RECORD

5.1 Basic Info
Entry screen for basic surrogate information. Includes fields listed below.

**Accession #**: a non-repeatable alpha-numeric field used for identification information for a surrogate.

**Accession Date**: a date field for information as to when a surrogate is accessioned.

**Surrogate Type**: a controlled pick list which appears when cursor is placed in field, offers a list of surrogate types to choose from, i.e., b&w slide or color photograph.

**Classification**: four blank spaces to be used for classification information for the surrogate.

**Image Source**: field where the surrogate source information can be linked to the surrogate. When the field to the right of the “Image Source” button is filled in it will either automatically fill in the field with the correct source which is stored in the Image Source table or will bring up a box that says, “______ does not exist. Create it?” If you choose “OK” at this point a blank Image Source record will appear for you to fill out (see SECTION 7. IMAGE SOURCE RECORD).

**Volume; Issue #; Year; Page #**: these four fields appear under Image Source. They allow you to fill in more information about your image source. Some are particularly useful if image source is a journal or a book in a series. The “Page #” allows you to specify where the image comes from in the source.

**Name box**: this box is a repeatable field which is identical to the Name box that appears in the site record. It enables you to link a name to a surrogate instead of to the entire site.

**Image Description**: text box for description of the surrogate.

**VIA checkbox**: check box which authorizes record to be sent to VIA.

5.2 Notes
Entry screen for additional textual information regarding the surrogate.

**VIA Notes**: text field for notes about the surrogate which will appear in VIA.

**In House Notes**: text field for notes about the surrogate which will remain in OLIVIA for other catalogers and users.

**Access Restrictions**: text field for information about any access restrictions that have been placed on the surrogate.

**Surrogate Credit**: a controlled pick-list of possible credits for the surrogate.
5. SURROGATE RECORD

**Surrogate Copyright**: text field for specific copyright information for the surrogate.

**Surrogate Requestor**: text field for requestor information for the surrogate.

**Image Capture Date**: date the digital image information was entered into OLIVIA.

### 5.3 Labels & Index Terms
Entry screen to customize slide labels currently utilized by the Graduate School of Design and the Fine Arts Library Visual Collections.

**Labels**: on the left side of the screen there are two boxes: Slide Label Top and Slide Label Bottom. These can be used if labels are needed for visual surrogates in the form of slides, but for many slide labels there have been templates designed making the need for these boxes obsolete.

**Index Terms**: a repeatable field used for indexing subject matter including genre terms, e.g. landscape, portrait.

**Remove Index Term**: to remove an index term there is a button below the Index Terms box that enables you to remove an index term.

### 5.4 Image Information
Entry screen where a surrogate image can be linked to the surrogate record.

**Link Image**: links an image to be associated with the surrogate record. The image record must be created prior to linking the image. The URL of the image should be entered here or through the **Acquire from Repository** button.

**Clear Image**: clears the image currently displayed in the surrogate record.

Check boxes to restrict access to the image:

- **Image Restriction**
- **Thumbnail Restriction**
6. NAME AUTHORITY RECORD

There are two types of Name Authority records: Corporate and Individual. In the upper right corner of the Names screen, the appropriate Name record type must be selected before entering data. For example, if one creates a corporate name record, the Corporate bubble must be marked.

6.1 Corporate

Entry screen for corporate names associated with a work, site, group or surrogate record. Includes names of companies and institutions (e.g. universities or museums)

**Institution:** name of the corporate entity

**Sort Name:** identifies how the name will be displayed in lists and sorting. For corporate names, the value is the **Institution** name.

**View/Modify Alternate Name Record:** provides access to an Alternate Name Record

**New Alternate Name Record:** Entry screen to enter information for an alternative name of a given name. This is a repeatable field where a name record can have multiple Alternate Name Records.

- **Institution:** Name of the corporate entity
- **Prefix:** applicable for personal names
- **Given Name:** applicable for personal names
- **Middle Name:** applicable for personal names
- **Family Name Prefix:** applicable for personal names
- **Family Name:** applicable for personal names
- **Suffix:** applicable for personal names

**Authority Source:** controlled pick-list of sources where information is confirmed and taken from.

**Authority Note:** identifies the source when "Local sources" or "Source Date Found" are selected in the Authority Source field.

**Delete Alternate Name Record:** removes an Alternate Name Record from the Name Record

**City:** Location of the corporate entity

**State/Province:** Location of the corporate entity

**Country:** Location of the corporate entity

**Classification Country:** usually not applicable

**Start Year:** if known, the beginning year date of a corporate entity.
6. NAME AUTHORITY RECORD

**End Year:** if known, the end year date of a corporate entity.

**Cutter Code:** Code used for a particular name based on local cataloging guidelines

**Dates Description:** text field for additional description of a date, e.g. May 1993. Also includes non-precise prose dating, such as ca., fl., 19th century, etc.

**Authority Source:** controlled pick-list of sources where information is confirmed.

### 6.2 Individual

Entry screen for individual names associated with a work, site, group or surrogate record, e.g. Pablo Picasso, Jane Brown, Queen Elizabeth.

**Prefix:** a title placed before a personal name (e.g. Sir, Baron)

**Given Name:** often the first name of an individual

**Middle Name:** middle name of an individual

**Family Name Prefix:** any family prefix

**Family Name:** often the last name of an individual. For regal names, the first name is entered e.g. Elizabeth is entered for a name record of Queen Elizabeth. **The Family Name field MUST be filled in for name searching to work properly.**

**Suffix:** a title or an adjective usually added after the Family Name, e.g. Brughel the Younger

**Sort Name:** displays the concatenation of the following name fields: **Family Name** + **Suffix**, **Prefix** + **Given Name** + **Middle Name** + **Family Name Prefix**. This field can be edited by a cataloger.

**Direct Order check box:** removes the comma between entries in **Suffix** and **Prefix** fields.

**View/Modify Alternate Name Record:** provides access to an **Alternate Name Record**.

**New Alternate Name Record:**
Entry screen to enter information for an alternative name of a given name. This is a repeatable field where a name record can have multiple **Alternate Name Records**.
Delete Alternate Name Record: removes the Alternate Name Record from the name record.

Country: country of origin

Classification Country: country other than the country of origin where an individual may be classified within a specific repository.

Start Year: birth date

End Year: death date

Cutter Code: Code used for a particular name which is based on local cataloging guidelines.

Dates Description: text field for additional description of a date, e.g. May 1993. Also includes non-precise prose dating, such as ca., fl., 19th century, etc.

Authority Source: controlled pick-list of sources where name information is confirmed.

6.3 Sites & Works
Read-only section

Site Relationships: displays all site records that are currently linked to the name record.

Work Relationships: displays all work records that are currently linked to the name record.

6.4 Surrogates & Groups
Read-only section

Surrogate Relationships: displays all surrogate records that are currently linked to the name record.

Group Relationships: displays all group records that are currently linked to the name record.

6.5 Notes
Additional information that may be inappropriate in other entry screens.

General Notes: general information about the individual or corporate entity

Biography/History: biographical and historical information related to the
individual or corporate entity.

**Authority Notes:** identifies the authority source if "Source Date Found" is selected in the **Authority Source** field of the **Corporate** or **Individual** entry screens.

**Affiliations:** affiliates related to the name record.

**Problems:** Use for indicating "needs more authority work."
7.1 Creating a new Image Source

Entry screen for creating a new Image Source record.

Source Name/Title: text field for the title or name of the source

Source Type: controlled pick list of source types

Abbr./Alt. Title: text field to enter in alternate or abbreviated title information

Series Title: text field to enter series title information

Author: text field for author information

Publication Place: text field for place of publication

Publisher: text field for name of publisher

Source Date: field for date of publication

Edition: text field for edition information

Hollis #/Ref #: field for source reference numbers

Call Number/Library: repeatable field for different call numbers for different copies of the same source

Notes: large text box for any notes about the image source

Cancel/Accept: Choose whether to accept the record, thereby adding it to the database. Or, cancel the record, thereby deleting it from the database.
8. SETS

8.1 Creating/Retrieving a Set

Sets are used to organize and group records. You can create a set of works, groups, sites or surrogates. You may either create a set from a Search Results Screen or while you are creating or editing a record.

From the Search Results Screen
1. After executing a search you are presented with a page of results. At the bottom of this page there are 9 buttons, from left to right, the “Sets…” button is the 7th. Click on this button.
2. After clicking on the “Sets…” button you are given 6 possible choices:
   a. Create a new set – you must select a record(s), click on “Create a new set,” a box then appears and you must name your new set and choose whether to make it public or private.
   b. Add records to a set – you must select a record(s), click on “Add records to a set,” a box then appears and you must choose or type in what set to which you want to add these records.
   c. Remove records from a set – you must select the record(s) you want removed, click on “Remove records from a set,” a box then appears and you choose or type in what set you want these removed from.
   d. Retrieve a set – click on “Retrieve a set,” a box appears with the list of sets for that record type, you may choose which set you want to retrieve.
   e. Delete a set – click on “Delete a set,” a box appears with the list of sets for that record type, you may choose which set you want to delete.
   f. Modify attributes of a set – if you click on “Modify attributes of a set,” it allows you to change the name of a set, a box appears, you choose the set you wish to change, make name change and save changes.

From an Individual Record
1. Find the record you want to add to a set or you may add a newly created record to a set.
2. In the lower right corner of the record screen there is button that reads “Sets…” Clicking on this button displays 5 options:
   a. Create a new set – brings up a box which allows you to name the new set you are creating with this as the first record
   b. Add this record to a set – brings up a box which allows you to choose the set to which you would like to add this record
   c. Remove this record from a set – brings up a box with a list of sets, you can choose/type the name of the set from which you want to remove this record.
   d. Delete a set – brings up a box with a list of sets, you may choose the one you wish to delete.
8. SETS

e. Modify attributes of a set -- allows you to change the name of a set, a box appears, you choose the set you wish to change, make name change and save changes.
9. TEMPLATES

9.1 General Information
A template is a record form that has preset information which encourages streamlined data entry. Templates are especially helpful when there are numerous records with consistent information (e.g. same culture, work type, artist, image source, etc.). An OLIVIA user can create a template for work, site, group and surrogate records.

Options to create, edit, and use templates are found under the main headings of the splash screen (the OLIVIA title page) under "Groups," "Works," "Sites" and "Surrogates."

Record screens for templates resemble regular record screens. The only marked difference is the header of the template record screen will indicate that it is a template rather than a true record.

Almost all of the fields are available for making templates. The following are exceptions:
- Surrogate records can not be linked or created within a template record
- VIA checkbox
- Linking records for Name Authorities do not have the Notes field available
- Thumbnail images can not be linked to image records
- Name Authority records can not be created through a template record.

9.2 Create Template

A. To create a template, select "Create Template" under the appropriate record type heading of the splash screen (the OLIVIA title page). For example, if you want to create a template for a Work record, select "Create Template" under the "Work" menu.

B. Enter information which will be constant in a series of records you will be entering. Remember that some fields are not available for making templates. See section 9.1.

C. When you are finished with the template, click the "Accept" button. Otherwise click the "Cancel" button to cancel your template record.

D. Upon clicking "Accept" a "Save Template" window appears.
You will need to assign a name to your template and specify the public availability of it. If you do not check the "Public?" box, no other user may access the template except you. If you check the "Public?" box, other users will have access to your template. Click "OK" when you are satisfied with your template name and have indicated the public/private status of it.

### 9.3 Modify Template

A. To modify an existing template, select "Modify Template" under the appropriate record type heading of the splash screen.

B. A "Load Template" window should appear. This window resembles the "Save Template" window except the list will reflect templates which are public and private to only you.

C. Select the template you would like to modify. Click "OK."

D. Make any necessary changes.

E. Click "Accept" when you are satisfied with your changes. The "Save Template" window should appear. You now have the option to save your template by the same name or assign a new name. If you decide to use the same name, the original template will be overwritten by the modified one. If you assign a new name, the original template will still exist under its original name and the modified template will exist under its new name.
9.4 New Work From Template

A. To create a record using a previously defined template, select "New Work From Template" under the appropriate record type heading from the splash screen.

B. The "Load Template" window should appear. After selecting the template you want to use, the form of the appropriate record type will appear with all the information previously entered from your template. You can proceed to enter additional information.

C. Click "Accept" when you finish your record creation. The record is now saved and another one based on the same template will appear.

9.5 Deleting Templates

You may delete a template that you created when you are either in the "Load Template" or "Save Template" windows. Simply highlight the template you wish to delete and click "Delete".
10.1 Batch Image Processing

- Batch Image Processing functions are used in conjunction with the scanning and linking of image files. They are part of the project workflow when materials are being cataloged into OLIVIA and digital images are being created with the image files stored in the Harvard Digital Repository (DRS). Batch Image Processing appears as an option under the Admin Menu of OLIVIA. This function is available to Level 1 Catalogers as well as Administrators.

When Batch Image Processing is selected, a window appears (see Figure 1) that displays a list of all batches available to the user. A named batch consists of the records in all main tables (Groups, Works, Surrogates, and Sites) that belong to sets with the same name. The listing of available batches also indicates the number of records in each main table that are included in the batch.

![Batch Image Processing window](image)

**Figure 1: Batch Image Processing window.**

The buttons along the bottom of the window provide access to various functions that can be performed with batches. Below is a brief description of each function.

- **Create Spreadsheet:** Clicking this button will cause OLIVIA to generate a tab-delimited spreadsheet for the selected batch to be used in the workflow for LDI Imaging Projects. See “Creating an inventory control spreadsheet” below. Also see “Workflow Document for LDI Digital Imaging Projects” available on the OLIVIA web site.
10. BATCH IMAGE PROCESSING

Note: When a spreadsheet is created for a batch, the sets in the batch are locked so that records cannot be added to or deleted from the sets in the batch. This is an attempt to assure the continued accuracy of the information contained in the spreadsheet. However, be aware that while the sets themselves may not be changed while locked, there is nothing to prevent individual records belonging to a set from being edited while the set is locked.

Unlock Sets in Batches: The sets in a batch can be unlocked via this button. It is strongly recommended that this not be done if the physical materials represented in the batch have already been sent to be scanned. Any editing of the sets during this period may result in errors when OLIVIA attempts to retrieve the images.

- Thumbnail report: Clicking on this button will generate a thumbnail report for the selected batch. The report includes thumbnail images for each record, accompanied by the title, OLIVIA ID # for each image, the accession number for the record, and the caption for the image.

Retrieve Images: Clicking this button will cause OLIVIA to connect to the Digital Repository Service (DRS) and retrieve thumbnail images for the records in the selected batch.

Done: Clicking this button returns the user to the main screen of OLIVIA.

10.2 Creating an inventory control spreadsheet for materials to be digitized

Summary: An inventory control spreadsheet should accompany each batch of materials (cataloged in OLIVIA) to be digitized (see figure 2). The spreadsheet as generated by OLIVIA includes columns for:

- OLIVIA ID# w/ prefix: (G, W, U or S - applied automatically)
- Accession #: (populated by the accession # field in OLIVIA)
- Image File Name(s): Image file Name is the OLIVIA ID# with its prefix and an extension automatically applied in the form, "_n" where "n" is a number. Extensions are applied sequentially.
- Restricted: Are these images restricted to the Harvard Community or open to the world?
- Image caption/description: Entries in this field will display in VIA.

The information appearing in the spreadsheet generated by OLIVIA is inserted into the OLIVIA Scanning Spreadsheet template to create the inventory control spreadsheet. The template includes areas for entering the following required administrative data:

- Owner/Collection/Batch: local repository name/collection name/local batch identification (OLIVIA batch name)
- Total # of originals: # of original items in this batch, used for tracking purposes
10. BATCH IMAGE PROCESSING

Note: it is not required that the OLIVIA Scanning Spreadsheet Template be used. The required administrative data can simply be added to the spreadsheet generated in OLIVIA.

<table>
<thead>
<tr>
<th>Owner/Collection/Batch: Baker Library/Trade Cards/ tradecards1</th>
<th>Total # of originals: 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>OLIVIA ID # w/prefix</td>
<td>Accession #</td>
</tr>
<tr>
<td>W80329</td>
<td>W80329_2</td>
</tr>
<tr>
<td>W80329</td>
<td>W80329_3</td>
</tr>
<tr>
<td>W80334</td>
<td>W80334_1</td>
</tr>
<tr>
<td>W80334</td>
<td>W80334_2</td>
</tr>
<tr>
<td>W80336</td>
<td>W80336_1</td>
</tr>
<tr>
<td>W80336</td>
<td>W80336_2</td>
</tr>
<tr>
<td>W80337</td>
<td>W80337_1</td>
</tr>
</tbody>
</table>

Figure 2: Spreadsheet generated by OLIVIA with added administrative data.

- **Generating spreadsheet in OLIVIA**

  1. Place records for images to be scanned into a batch. This is done by creating a set for the required records in each main table (Groups, Works, Surrogates, and Sites). As a batch consists of the records in all tables that belong to sets with the same name, the sets should be named accordingly. If working only with records in one main table (Groups, Works, Surrogates, or Sites), place the records in a set and name it. That name will also be the name of the batch. If it is necessary to include records from multiple main tables, use the same name for the sets created in each main table (Groups, Works, Surrogates, and Sites) and all records in those sets will appear in the batch of the same name.

  2. From the main OLIVIA screen, under the Admin menu, select **Batch Image Processing**.

  3. In the batch image processing window of OLIVIA, select the desired batch and generate a spreadsheet for the batch (click on **Create Spreadsheet**).

  4. You will be asked to select a location and assign a name for the text file that will be created. Once this is done, the system will generate a text file.

Note: This file can be opened as a spreadsheet in Microsoft Excel by following the steps outlined in the next section, **Using the OLIVIA Scanning Spreadsheet Template**. If the Spreadsheet Template is not being used, follow Steps 2 and 3 below, add the administrative data detailed above to the spreadsheet, and go to Step 7.
10. BATCH IMAGE PROCESSING

- Using the OLIVIA Scanning Spreadsheet template

1. Obtain the Microsoft Excel file for the OLIVIA scanning spreadsheet template (available on the OLIVIA web site) and open the template file in Excel.

2. While still in Excel, open the tab-delimited text file that you exported from OLIVIA. From the File menu, choose Open.... A dialog box will appear that will allow you to browse through your file system to find the file (be sure that you specify "All files" or "Text files" in the "Files of type" box near the bottom of this dialog window). Find the exported text file and double click on it.

3. You will be presented with the Text Import Wizard. On the first screen of the Wizard, the file type should be "Delimited" and the import should start at row 1. Click on the Next button. On the second screen of the Wizard, the only delimiter checked should be "Tab". Consecutive delimiters should not be treated as one. Click on the Next button. On the third and final screen of the Wizard, the data format for all columns should be "General" or "Text." Click on the Finish button when you have completed specifying the options for importing the file. The data should appear in four columns on an Excel spreadsheet.

4. Use the mouse to highlight all the data in the OLIVIA-generated spreadsheet that is now in Excel. Choose the Copy option under the Edit menu. Under the Window menu, switch to the template file. Click on a cell in the first column, somewhere below the header information provided by the template (for example, cell A11). Choose the Paste option under the Edit menu to paste the OLIVIA-generated data into the template.

5. Fill out the appropriate header information and any additional administrative information required.

6. Save the Excel spreadsheet that has the header information and the OLIVIA-generated data. Use the Save As... option under the File menu and a different file name so that the original template file can be re-used later.

7. A hard copy and an electronic copy of the spreadsheet should be delivered to the Imaging Lab along with the materials to be scanned.

Note: If mistakes are noticed in a spreadsheet once it is generated, it is possible to unlock the sets in the batches (using the Unlock Sets in Batch button on the batch image processing window), correct the set(s), and generate a new spreadsheet. The sets in the batches will be locked again once the new spreadsheet is generated.

10.3 Retrieving images from the Digital Repository

Once scanning is completed and notice has been received that images have successfully been placed in the digital repository (DRS), the images must be retrieved through
10. BATCH IMAGE PROCESSING

OLIVIA to link them to the cataloging records. Batch image processing allows for the retrieval of batches of images. (It is also possible to link images individually from the record.)

1. From the main OLIVIA screen, under the Admin menu, select **Batch Image Processing**.

2. In the Batch Image Processing window of OLIVIA, select the batch for which you wish to receive images from the repository and click on the **Retrieve Images** button. This process creates a log file. You will be asked to specify a location and assign a name for this log file.

3. When the image retrieval process is complete, review the log file (this is a separate file and so it is necessary to use some other program on your computer, such as Notepad, to read it, but you do not need to exit from OLIVIA to do this). Any errors will be reported in there. It will also contain information about the total number of images successfully imported.

4. Once you have checked the log file, return to the Batch Image Processing screen in OLIVIA. With your batch still selected, click the button to **generate a thumbnail report**. This will be a printed report. This report can be used this to review the thumbnails that are now associated with the records represented in the batch and check them for correctness.

Note: Sets are unlocked once the thumbnails are retrieved. It is recommended that sets be deleted once the user is completely finished with them and has no further need for those groupings of records. They should **not** be deleted until after thumbnail images have been retrieved and a quality control check performed.

If any problems are encountered during this process, please notify olivia-dev@hulmail.harvard.edu.
Functional features

These buttons relate to the saving and exiting of a record

a. **Accept** button: saves the record

b. **Cancel** button: allows the user to exit a screen or record without saving any new information. The point of return (i.e. where the user returns to after exiting the record) is the previous page from which the user has accessed the record/screen.

c. A common misunderstanding for first time OLIVIA users is hitting the "accept" button when completing an entry screen of a record (e.g. Basic Info screen). Please note that the Cancel and Accept buttons have an exclusive relationship to the whole record and not between pages of the record, i.e. use the "accept" button when all the pages of a record are completed and you are ready to save a record.

Provides access to repeatable fields often with controlled lists. Also used to add and delete term(s) from a field.

1. **To add a term** to a field: users need to be in the desired field. This is indicated when the user clicks anywhere within the field and a blinking black triangle appears adjacent to the name of the field.
   a. **To access a list:** hit the "+" sign.
   b. **To select a term:** hit "OK" or double click on the term. To add more than one term to a field, repeat steps 1a & 1b above.

2. **To delete a term from a field:**
   a. place the cursor on the term to be deleted (or anywhere on the line where the term is on) and click.
   b. when the list appears, hit the "cancel" button and you will find a blinking cursor following the last letter of the term. This indicates that the term is ready to be deleted.
   c. click on the "-" sign and the term is deleted
Fields accessed through the "-/+" signs:

**Basic Info** screen:
- Alternate Titles
- Work Type
- Culture

**Notes & Numbers** screen:
- Associated Number
- Type

**Access Terms** screen:
- Style/Period
- Materials/Techniques/Support
- Index Terms

**Local & Related Info** screen:
- Related Works
- Related Information

**Local Work record:**
- Formats Available
KEystroke equivalents

OLIVIA main screen
All of these keys must be pressed in conjunction with the CTRL key (on PCs) or the Command key or the Apple key (on Macs).

<table>
<thead>
<tr>
<th>Action</th>
<th>Groups</th>
<th>Works</th>
<th>Sur.</th>
<th>Sites</th>
<th>Names</th>
<th>Img</th>
<th>Src</th>
</tr>
</thead>
<tbody>
<tr>
<td>New record</td>
<td>1</td>
<td>4</td>
<td>7</td>
<td>A</td>
<td>D</td>
<td>F</td>
<td></td>
</tr>
<tr>
<td>New using template</td>
<td>2</td>
<td>5</td>
<td>8</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View/Modify record</td>
<td>3</td>
<td>6</td>
<td>9</td>
<td>C</td>
<td>E</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Exit OLIVIA: CTRL/COMMAND Q

Search screens

Next page: CTRL/COMMAND ALT/OPTION [right arrow]
Previous page: CTRL/COMMAND ALT/OPTION [left arrow]

Return screens

Done: CTRL/COMMAND .
Search: CTRL/COMMAND F
Sort Editor: CTRL/COMMAND T
Attach Index Terms: CTRL/COMMAND I
(page up/down and first/previous/next/last record are being worked on)

On all screens:

Accept: ENTER
Cancel: CTRL/COMMAND .
First record: CTRL/COMMAND SHIFT [up arrow]
Previous record: CTRL/COMMAND [up arrow]
Next record: CTRL/COMMAND [down arrow]
Last record: CTRL/COMMAND SHIFT [down arrow]
Previous page: CTRL/COMMAND ALT/OPTION [right arrow]
Next page: CTRL/COMMAND ALT/OPTION [left arrow]
Add repeatable field: CTRL/COMMAND R

Only on relevant screens:

Link Surrogate: CTRL/COMMAND L
New Surrogate: CTRL/COMMAND N
New Surr. w/ template: CTRL/COMMAND T
Link Name: CTRL/COMMAND L
Link Site: CTRL/COMMAND S
Attach index term: CTRL/COMMAND I