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Chapter 1. Introducing OLIVIA

OLIVIA is a software program which catalogers can use to enter data about their collections. The data entered into OLIVIA is stored in a more complex relational format than is allowed by standard flat-file MARC records. This data can, in turn, be exported to the Visual Information Access (VIA) system. VIA is a web-accessible union catalog of visual resources at Harvard and Radcliffe.

OLIVIA is a client/server application. The client program is installed on each cataloger’s desktop, and each client connects to a central server where the data is stored in a relational database. Access to the system requires a valid account (username and password). System administration services for OLIVIA are available from the Harvard University Library’s Office for Information Systems.

OLIVIA has been designed to provide the flexibility to catalog a wide variety of visual materials. Not all options are appropriate for all types of materials. OLIVIA users should adhere to their local guidelines for entering cataloging data into the OLIVIA database. This may mean that some fields are left blank or restricted to a small set of possible values.

1.1 Types of Records

There are six main kinds of records that can be created in OLIVIA: Group, Work, Surrogate, Site, Name Authority, and Image Source.

- **Work** records describe an original work, usually of art or architecture (sculpture, building, painting, print, photograph, etc.). The work described may or may not be held by the repository entering the record.

- **Group** records are used to describe groups of works commercially produced as a set, existing as an intellectual set (e.g., a group made by the artist/photographer/architect), or deliberately grouped together for other reasons (e.g., a folder of photographs from an archival collection).

- **Site** records are used to describe the content of a built environment (e.g., cities, buildings, complexes, landscape architecture, archaeological sites). Site records may also be used to hold information about a site appearing in a work (i.e., site authorities). The latter usage is parallel to Name Authority records.

- **Surrogate** records describe items that depict works, sites, or groups (e.g., a photograph of the Empire State Building, or a slide of Picasso’s *Guernica*).

- **Name Authority** (also referred to as simply Name) records are used to hold all the names appearing in the repository. They can be used to establish the preferred or authorized version of an individual or corporate name that is used throughout the database.

- **Image Source** records describe edition, publication, and other bibliographic data recorded about images which are referenced in OLIVIA. They also describe vendor and donor information. This information can be used to relocate or reuse an image, or to validate its source.

1.2 OLIVIA Concepts

Repositories

Each OLIVIA user is assigned to a repository when the user account is created. The repository indicates the library or collection with which the user is affiliated. Records created by that user are automatically assigned to the repository. Users can view records from other repositories but should not modify them.
Note: For OLIVIA version 1.2, repository restrictions are not implemented. Users should take particular care to modify only those records belonging to their repository.

In some cases, a user will need access to more than one repository. Instead of being assigned to a single repository, the user is presented with the Repository dialog (Figure 1 below) to choose a repository upon logging in. Select a repository from the drop down list in the dialog and OLIVIA will set the repository to your choice.

Figure 1. Choose Repository dialog

Local Information

If two or more repositories have the same item, the item itself is only entered into OLIVIA once. Each repository enters specific information for the copy that it has (such as Accession and Classification Numbers), using the Local Information screen. Local information can be entered for Group, Work, and Site records. Figure 2 shows the Local Work Information screen.

Figure 2. Local Information screen
Hierarchies

Using OLIVIA, it is possible to create two- and three-level hierarchies of items (Groups, Works, Surrogates, and/or Sites) by creating records at each level and linking them. For example, if the Parthenon was entered into OLIVIA as a Site record, and any slides of the Parthenon in the current collection were entered as Surrogate records, a two-level hierarchy could be created by using the Surrogates tab on the Sites detail screen to link each of these Surrogate records to the Site record. Hierarchies allow the items in your collection to be related to each other in ways that flat-file record formats such as MARC do not allow. Any hierarchies you create will appear in VIA when the records are exported.

1.3 OLIVIA Help Desk

For technical assistance with OLIVIA (e.g. to request a new user account, to arrange the installation of the OLIVIA client on your machine, or to report the system as being unexpectedly unavailable), contact the HUL Office for Information Systems at (617) 495-3724, or by mail at 1280 Massachusetts Avenue, Suite 404, Cambridge, MA 02138.

Bug reports should be sent to the developers by e-mail at olivia-dev@hulmail.harvard.edu. Please provide as much detail as possible, as well as a means by which you can be contacted should more information be required.

Assistance with cataloging specific items should be provided by your local repository. There is, in addition, a mailing list for users to discuss OLIVIA informally. Contact the Help Desk if you are an OLIVIA user and would like to be added to this mailing list.

1.4 Where This Document Can Be Found

The OLIVIA User Guide should be available as a PDF file from http://hul.harvard.edu/ldi/html/olivia_documentation.html. Appendices B, C, D, and E (the OLIVIA-to-VIA Data Map, the official documentation for the Quick Report Editor, the LDI Digital Imaging Projects Workflow document, and the OLIVIA Data Dictionary, respectively) should also be available as separate PDF files from the same site.
Chapter 2. Getting Started with OLIVIA

This chapter explains the procedures for getting started using the OLIVIA program, including accessing the system, and provides an overview of the commands that are available through the menus on the main screen. Subsequent chapters will explain many of these functions in more detail.

2.1 Logging In to the System

1. To access OLIVIA, double-click the OLIVIA icon on the desktop or choose it from the Start menu (Windows) or Apple menu (Macintosh). If access to OLIVIA is not available through either of these alternatives and you are certain the client program has been installed, try searching for it using your computer’s Find File feature. The client program name should include "4D_Client" or "4D Client" or "4DClient." If the client program has not been installed, contact the OLIVIA Help Desk.

2. When the 4D Network Component dialog (Figure 3) appears, click the More Choices button (Windows) or the toggle flag in the upper right (Macintosh) to display the list of OLIVIA servers available to you.

3. Highlight the OLIVIA server from the list shown in the expanded dialog (Figure 4), and click the OK button.

Note: If there are no servers listed, attempt to set one up as described in Section 7.2 or contact the OLIVIA Help Desk.
4. When the Password dialog (Figure 5) appears, fill in your OLIVIA username and password and click the Connection button. If you have not been given a username and/or password, contact your local OLIVIA system administrator or the OLIVIA Help Desk to obtain one.

The first time you log in, you should be given the opportunity to change your password from the one initially assigned to you. The process will be similar to that described below for the Change Password option under the File menu on the main screen, except you will not have to enter your current username and password again.

5. In cases where the user has access to more than one repository, the Repository dialog (Figure 6) appears. Select the appropriate repository from the dropdown list in the dialog.

6. Afterward, the main screen of OLIVIA appears. The system is available for you to begin work.

2.2 Commands Available from Menus on the Main Screen

The main screen of OLIVIA has menus that allow you to initiate many different activities in OLIVIA. Figure 7 shows the menus that are available on the main screen. Notice that there are separate menus for each of the record types. The discussion of these is grouped together under Record type menus. Many of these functions are available only from the main screen; in order to utilize them you will first have to return there.
Figure 7. Menus present on the main screen of OLIVIA

File menu

Change User
This allows you to switch user accounts without exiting and restarting OLIVIA. After selecting this menu option the Password dialog (Figure 5 above) will be displayed. Enter the new username and password, and click on the Connection button to log in.

Change Password
To change the password on your OLIVIA user account, choose Change Password from the File menu. The Password dialog (Figure 5 above) will be presented. Enter your current username and password to confirm your identity. Then another dialog window will appear. After entering your new password and clicking OK or pressing the Enter key, this window will be replaced by a very similar one which will ask you to confirm your new password by re-typing it.

Note that passwords must be composed of at least five but no more than fifteen alphanumeric characters and may not be the same as your username.

View Windows
This menu item presents a list of all windows that are open within OLIVIA and allows you to choose which to bring to the top of the desktop. This is useful if you have multiple windows open and one has become lost behind others (as may happen when viewing images linked to records). This option is also available under the Admin menu.

Quit
This closes the OLIVIA session.

Record type menus
The menus for the six different record types (Groups, Works, Surrogates, Sites, Names, and Image Sources) have similar functionality. There are options that allow you to create new records of Record type and to view or modify existing records. For certain types of records, you can create and modify templates and use them in the creation of new records. As of version 1.2 templates are available only for Works, but they will soon be available for Groups, Surrogates, and Sites as well.

New Record type
To create a new record, choose this option from the menu for the type of record you want to create (e.g., choose New Work from the Works menu to create a new Work record). The detail screen appropriate to the record type you selected will be presented. Enter data into the record according to your repository’s cataloging guidelines, and save it by clicking on the Accept button. To cancel the record’s creation without saving your changes, click the Cancel button. See Chapter 5 for more information about detail screens and entering data into records.
New Record type From Template

To create a new record using a previously defined template, choose this option from the menu for the type of record you want to create. A small window will appear. This window will list the name and creator of each of the templates available. After choosing a template to use, the detail form appropriate to the record type will appear with all the information previously entered for that template. You can then add any information specific to the record to be created. The template will be unaffected by any of these changes. See section 5.3 for more information on using templates.

View or Modify Record type

When you select this option a Search form for the appropriate record type appears. After specifying a search a list of matching records will be returned and you can then double click on specific records to view and edit them. See Chapter 3 for more information about searching for records and Chapter 4 for more information on Return Screens.

Create Template

After choosing this option, a form very similar in appearance to the detail form for the appropriate record type will appear. The form will have a header that indicates it is for a template rather than a true record. Furthermore, fields that are available for true records but not for templates will not be present on this form. You will be able to add information just as if you were creating a new record, with the exception of fields that are not available for templating, of course. However, you should take care to enter only information that is common to a number of records that have yet to be created, or else the purpose of the template will be defeated. It should be noted that the minimum record requirements for records in tables linked to the main record must be met, but not those for the main record itself. Thus, for example, you will not be able to create a Local Information record in the template without filling in one of the required Local Information fields but you will be able to create a Work template without entering a Work title. See Section 5.3 for more information on creating templates.

Modify Template

After selecting this option, a small window will appear. This window will list the name and creator of each of the templates available. After choosing a template to use, the detail form for templates will appear with all the information previously entered for that template. You may then add or change whatever information you wish. See Section 5.3 for more information on editing templates.

New Surrogates - Batch

The Surrogates menu provides an option that is not available for any of the other record types: the automatic creation of a number of new Surrogate records with the same data in a select number of fields. When you choose this option a window appears that allows you to specify the Accession Numbers of the Surrogate records to be created and to enter the common information. First, type in the Accession Number of the first record to be created and the number of records to be created. There are two entry boxes for the Accession Number. The first box should contain the static portion of the number, while the second contains the incrementing portion. These two portions will be separated by a period in the actual records. For example, if you type "1999" in the first box, "0001" in the second and indicate that 2 records should be created, the new Surrogate records will have Accession Numbers of "1999.0001" and "1999.0002."

You can provide information about the Image Source and the Surrogate credit, copyright, requestor, and type. Not all of these fields have to be filled out.
Admin menu

The items included under the Admin menu are normally only available to Administrators or OIS personnel. The one exception is the Batch Image Processing functionality, which is available to Level 1 Catalogers as well as Administrators.

Vocabulary List Maintenance

Many fields in the OLIVIA database are restricted to a specific set of values. When you tab into or click on one of these fields, a popup list containing the acceptable values appears. To alter the list of values, choose Vocabulary List Maintenance from the Admin menu. Note that although index terms are controlled vocabulary, they are maintained by a separate function on the Admin menu (described under Index Term Maintenance below).

In the dialog box that appears (Figure 9), choose the controlled vocabulary list you would like to edit from the drop down menu. The current contents of the list appear in the list box beneath the menu. The buttons on the right side of the dialog allow you to manipulate the contents of the list as follows:
• **Add**: Add a term to the currently selected list. A dialog box will appear asking you to enter the new term. Do so and click the **OK** button (or **Cancel** if you change your mind). Duplication of existing terms will be checked for and prevented.

• **Change**: Change the currently selected term in the list to a different term. A dialog box will appear asking what the currently selected term should be changed to. Note that if the currently selected term is present in records in the database, then this action will also change all these records to reflect the change. In cases where such changes are made to records in the database, this action can not be undone.

• **Remove**: Delete the currently selected term from the list. If the currently selected term is present in any record in the database, a window reporting the usage and explaining the consequences of continuing with the removal will appear. Otherwise, a small dialog box asking for simple confirmation of the deletion will appear. Note that in the first case if the removal is confirmed the changes made to the list can not be undone.

**Figure 10. Controlled Vocabulary Term Usage Report**

<table>
<thead>
<tr>
<th>Table</th>
<th>Field</th>
<th>Number of Records</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groups_Culture</td>
<td>Culture</td>
<td>1</td>
<td>b</td>
</tr>
</tbody>
</table>

**Export**: Export the list to a text file on the computer. This will enable perusal and large scale editing outside of the OLIVIA system. You will be prompted to name the file to which the list will be exported.

• **Import**: Import a list from a text file on the computer. You will be prompted to identify the file to import. The terms in the file (one per line) will be added to the currently selected list. Duplication of existing terms will be checked for and prevented.

• **Clear List**: Erase the entire contents of the currently selected list.

When you have completed whatever vocabulary maintenance tasks you wish to perform, select another list you would like to edit from the drop down menu or click the **Done** button. Note that in most cases, you will be given a final opportunity to undo whatever changes you have made to the previously selected list (exceptions are individually noted above).

**Index Term Maintenance**

The list of index terms that can be applied to Work, Group, Surrogate, and Site records is maintained in a manner similar to the controlled vocabulary lists as described above. The dialog box that appears will have a list of all the index terms and their associated authority source. The buttons located along the right side of the form will allow you to modify the list or specific items in the list.
Add: Add a term to the list of index terms. An input form will appear asking you to enter the new index term and the corresponding authority source. Do so and click the Accept button (or Cancel if you change your mind). Duplication of existing terms will be checked for and prevented.

Change: Change the currently selected term in the list of index terms. The same input form used to add new index terms will appear with the current information for the selected index term filled in. This information can be edited as desired, with the exception of changing an index term to be the same as another already existing term. If the selected term has been assigned to records, then this action will also change all these records to reflect the change to the index term.

Remove: Delete the currently selected term from the list of index terms. If the selected term is assigned to any records in the database it will be removed from those records.

Export: Export the list of index terms and corresponding authorities to a tab-delimited text file on the computer. This will enable perusal and large scale editing outside of the OLIVIA system. You will be prompted to name the file to which the list will be exported.

Import: Import a list of index terms and corresponding authorities from a text file on the computer. You will be prompted to identify the file containing terms and authority sources to import and to specify a name for a logfile where any alerts or warnings that occur during the import process will be recorded. The format for the import file is to include one index term and associated authority source per line with the term and authority source separated by a tab. Blank lines will be ignored. For each line in the file, the authority source will be checked against the list of permissible authority sources and will be converted to a blank if it is not included. If the index term provided by the file is the same as an existing term but the authority source is different, the authority source determined from the file (including a blank one resulting from a disapproved value in the file) will overwrite the already existing one.
**Change Surrogate Accession No.**

The Accession Number for a Surrogate record may only be entered once on the detail form for the Surrogate record and will thereafter be un-editable in that location. In order to change the Accession Number for a Surrogate record select **Change Surrogate Accession No.** under the **Admin** menu.

You are prompted first for the existing Accession Number, then for a new one. Records with blank Accession Numbers cannot be changed using this command. As of version 1.2, blank Accession Numbers can be edited at any time by any cataloger on the Surrogate record detail form.

**Unlink Surrogate**

A Surrogate record may normally be unlinked from whatever record (Work, Group, or Site) it is linked to by clicking the **Unlink Surrogate** button on the Surrogates tab on the record detail screen for that record. In rare cases, that record is unavailable and this menu item must be used. You are prompted for the Accession Number of the Surrogate record to be unlinked. Unless there is an error, that Surrogate record is then unlinked from any Work, Group, or Site record to which it was linked.

**Edit Users**

This functionality is reserved for OIS personnel.

**Assign Repository**

This functionality is reserved for OIS personnel.

**View Windows**

This menu item presents a list of all windows that are open within OLIVIA and allows you to choose which to bring to the top of the desktop. This is useful if you have multiple windows open and one has become lost behind others (as may happen when viewing images linked to records). This option is also available under the **File** menu.

**Batch Image Processing**

This menu item is available to Level 1 Catalogers as well as Administrators. It is used in conjunction with the scanning process. When the menu item is selected, a window appears (Figure 12) that displays a list of all batches available to you. A batch with a given name consists of the records in all tables that belong to sets with the same name. The listing of available batches also indicates the number of records in each table that are included in the batch. The buttons along the bottom of the window provide different functions that can be performed with batches.
Create Spreadsheet: Clicking this button will cause OLIVIA to generate a tab delimited spreadsheet for the selected batch in accordance with the specifications of the Workflow Document for LDI Digital Imaging Projects (see Appendix D). After clicking the button, a dialog box appears that gives you the opportunity to specify the name and location of the spreadsheet file. Note that because the information is tab delimited, if this spreadsheet is viewed in a text editor it may not appear properly. Importing the file into a spreadsheet software program should resolve the columns correctly.

Note also that creating a spreadsheet for a batch locks the sets in the batch so that they can not be changed. 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 the records belonging to a set from being edited while the set is locked.

Unlock Sets in Batch: 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.

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. Note: As of version 1.2, this functionality requires the installation of an Oracle™ client on your machine. Contact the OLIVIA Help Desk for assistance in this matter.

Done: This returns you to the main screen of OLIVIA.
Chapter 3. Finding Records

In order to view or manipulate records in any way you must find them first. When you choose the View or Modify Record type option from one of the record type menus (Groups, Works, Surrogates, Sites, Names, or Image Sources), a Search dialog form appears. The contents of this form will vary depending on the record type you are searching for. Most search forms have multiple pages that contain different searches. These searches are explained in more detail in the following sections. Note that only one of these searches may be performed at a time. For example, if you fill out some fields on the Search by Example page and then switch to the Index Term Search tab, compose a search, and click on the Find button, the search will not take into account the information you entered on the Search by Example tab. If you do wish to utilize searches from multiple pages to find records, perform one search first and then use the Refine Selection drop down list (explained in Section 3.5 below) with the second search to combine the results appropriately.

3.1 Search by Example

Search forms for all record types have the option to Search by Example on the fields provided (see Figure 13 for the Search by Example tab for Works). Enter a value in one or more of the fields, and click the Find button to display the list of records retrieved. Entering values in more than one field will retrieve records that match all the values you entered. By default, the search assumes that all text values are ended with a wildcard character that will match any number of additional characters. Thus a search for the name "Rand" will turn up Name Authority records for "Randolph" as well as those for just "Rand." In order to obtain similar behavior with number fields, you will have to enter the wildcard character (@) yourself.

Figure 13. Search by Example tab
Information about what record fields are searched by each field in the different Search by Example pages is provided below:

**Groups Search by Example**

**Classification**
Filling out these fields will cause the system to search for Groups Local Information records with matching Classification fields. If any are found, the Group records to which they are linked will be returned. Any one or combination of the four Classification fields may be filled out.

**Group ID #**
The system will search for Group records whose Group ID number (the OLIVIA-assigned number in dark blue near the upper left-hand corner on the full detail screen for a record) falls within the range specified by these two fields. Any qualified Groups records will be returned.

**Surrogate Accession #**
The system will search for any Surrogate records whose Accession Number falls within the range specified by these two fields. If any are found, the Group records to which they are linked (if any) will be returned. Note that Surrogate Accession Numbers are stored as text information and so the system will search for records that would be alphabetically placed between the two specified fields. Accession Numbers that would not be in the range from a numerical perspective may be in it from an alphabetical perspective. For example, alphabetically, "10" comes between "1" and "2."

**Name Authority**
When this field is filled out the system will search for any Name Authority records whose Family Name or Institution fields match, or that have Alternate Names whose Family Name or Institution fields match. If any such Name Authority records are found, all Group records that are linked to them are returned. This search may be narrowed by entering information in the Name Relationship field (see below).

**Name Relationship**
When a Group record is cataloged and a Name Authority record is linked to it, the relationship that the Name Authority has to the Group can be indicated. This Name Relationship information can be used to narrow a search for Group records by Name Authority. Instead of finding all Group records with a link to the specified Name Authority, the system will find only those Group records with a link to the specified Name Authority and with the specified relationship to that Name Authority. Note that filling in the Name Relationship field by itself is not sufficient for a search to be executed. The Name Authority field must be filled in as well.

**Site Name**
The system will search for any Site records whose Site Name or Complex fields match, or that have Alternate Site Names that match. If any such Site records are found, all Group records that are linked to them are returned.

**Site City**
The system will search for any Site records whose City field matches. If any such Site records are found, all Group records that are linked to them are returned.
Title contains (slow)
The system will search for any Group records whose Group Title field or Alternate Title contains the text entered into this field. Unlike searches on other fields where the system automatically assumes the presence of a wildcard at the end of the information you type, here the system assumes wildcards are placed before and after your text. Thus records with the entered text anywhere in the Group Title field or Alternate Title will be found. This also causes this search to be slower than other searches.

Worktype
Filling in this field causes the system to search for any Group records that have a Worktype value that matches.

Materials/Techniques
Filling in this field causes the system to search for any Group records that have a Materials and Techniques value that matches.

Works Search by Example
The fields on the Search by Example page for Works behave similarly to those described for Groups above. The only significant difference is in the Work ID # search field.

Work ID #
The system will search for Work records whose Work ID number (the OLIVIA-assigned number in dark blue near the upper left-hand corner on the full detail screen for a record) falls within the range specified by these two fields. Any qualified Works records will be returned. Note that for historical reasons, Work ID numbers are stored as text information and so the system will search for records that would be alphabetically placed between the two specified fields. Work ID numbers that would not be in the range from a numerical perspective may be in it from an alphabetical perspective. For example, alphabetically, "10" comes between "1" and "2."

Surrogates Search by Example

Accession #
The system will search for any Surrogate records whose Accession Number falls within the range specified by these two fields. Note that Surrogate Accession Numbers are stored as text information and so the system will search for records that would be alphabetically placed between the two specified fields. Accession Numbers that would not be in the range from a numerical perspective may be in it from an alphabetical perspective. For example, alphabetically, "10" comes between "1" and "2."

Classification
Filling out these fields will cause the system to search for Surrogate records with matching Classification fields. Any one or combination of the four Classification fields may be filled out.

Image Source
The system will search for any Image Source records whose Source Name/Title matches the value you entered. If any such Image Source records are found, all Surrogate records that are linked to them will be returned.

Clicking on the button labeled Lookup will cause the preliminary search of Image Source records to be performed. If multiple Image Source records match, you will be presented with a list of them all.
and be able to pick a specific one. If only one Image Source record is found by the preliminary search, the system will automatically choose that one for you. If no Image Source records are found, you will be given the option of creating a new Image Source record. In any case, only Surrogate records linked to the chosen Image Source record will be returned by the final search.

**Surrogates by Sites**

**Associated Name**
When this field is filled out the system will search for any Name Authority records whose Family Name or Institution fields match, or that have Alternate Names whose Family Name or Institution fields match. If any such Name Authority records are found, all Site records that are linked to them are retrieved, and finally all Surrogate records that are linked to any of those Site records are returned.

Clicking on the button labeled **Lookup** will cause the preliminary search of Name Authority records to be performed. If multiple Name Authority records match, you will be presented with a list of them all and be able to pick a specific one. If only one Name Authority record is found by the preliminary search, the system will automatically choose that one for you. If no Name Authority records are found, you will be given the option of creating a new Name Authority record. In any case, only Surrogate records linked to Site records that are in turn linked to the chosen Name Authority record will be returned by the final search.

**Site Name**
The system will search for any Site records whose Site Name or Complex fields match, or that have Alternate Site Names that match. If any such Site records are found, all Surrogate records that are linked to them are returned.

**Complex Name**
The system will search for any Site records whose Complex field matches. If any such Site records are found, all Surrogate records that are linked to them are returned.

**City**
The system will search for any Site records whose City field matches. If any such Site records are found, all Surrogate records that are linked to them are returned.

**State**
The system will search for any Site records whose State field matches. If any such Site records are found, all Surrogate records that are linked to them are returned.

**Country**
The system will search for any Site records whose Country field matches. If any such Site records are found, all Surrogate records that are linked to them are returned.

**Style/Period**
Filling in this field causes the system to search for any Site records that have a Style/Period value that matches. If any such Site records are found, all Surrogate records that are linked to them are returned.
Site Type
Filling in this field causes the system to search for any Site records that have a Site Type value that matches. If any such Site records are found, all Surrogate records that are linked to them are returned.

Surrogates by Works

Associated Name
See the description above for searching Surrogates by Sites.

Site Name
The system will search for any Site records whose Site Name or Complex fields match, or that have Alternate Site Names that match. If any such Site records are found all Work records that are linked to them are retrieved, and finally all Surrogate records that are linked to any of those Work records are returned.

Work ID#
The system will search for Work records whose Work ID number (the OLIVIA-assigned number in dark blue near the upper left-hand corner on the full detail screen for a record) falls within the range specified by these two fields. If any Work records are found, all Surrogate records that are linked to them are returned. Note that for historical reasons, Work ID numbers are stored as text information and so the system will search for records that would be alphabetically placed between the two specified fields. Work ID numbers that would not be in the range from a numerical perspective may be in it from an alphabetical perspective. For example, alphabetically, "10" comes between "1" and "2."

Title contains (slow)
The system will search for any Work records whose Work Title field contains the text entered into this field (note that, unlike the similar search field on the Works Search by Example page, this search does not include Alternate Titles). If any such Work records are found, all Surrogate records that are linked to them are returned. Note: Unlike searches on other fields where the system automatically assumes the presence of a wildcard at the end of the information you type, here the system assumes wildcards are placed before and after your text. Thus records with the entered text anywhere in the Work Title field will be found. This also causes this search to be slower than other searches.

Surrogates by Groups

Associated Name
See the description above for searching Surrogates by Sites.

Site Name
See the description above for searching Surrogates by Works.

Group ID#
The system will search for Group records whose Group ID number (the OLIVIA-assigned number in dark blue near the upper left-hand corner on the full detail screen for a record) falls within the range specified by these two fields. If any Group records are found, all Surrogate records that are linked to them are returned.
Description contains
The system will search for any Group records whose Description field contains the text entered into this field. If any such Group records are found, all Surrogate records that are linked to them are returned. Note: Unlike searches on other fields where the system automatically assumes the presence of a wildcard at the end of the information you type, here the system assumes wildcards are placed before and after your text. Thus records with the entered text anywhere in the Description field will be found. This also causes this search to be slower than other searches.

Title contains (slow)
This search is similar to the "Description contains" search described above, except that it is the Group Title field that is checked for matches. Note also that, unlike the similar search field on the Groups Search by Example page, this search does not include Alternate Titles.

Sites Search by Example

Classification
See the description above for searching Groups.

Site ID #
See the description above for searching Groups.

Surrogate Accession #
See the description above for searching Groups.

Name Authority
See the description above for searching Groups (note that the Search by Example page for the Sites search form does not have a "Name Relationship" search field to use to narrow the search).

Site Name
The system will search for any Site records whose Site Name or Complex fields match, or that have Alternate Site Names that match. All such Site records are returned. Note that if the Complex name is known, using the "Complex" search field below will be faster and provide more specificity than this search field.

Site City
The system will search for any Site records whose City field matches. All such Site records are returned.

Site Country
The system will search for any Site records whose Country field matches. All such Site records are returned.

Site Type
Filling in this field causes the system to search for any Site records that have a Site Type value that matches. All such Site records are returned.
Complex
The system will search for any Site records whose Complex field matches. All such Site records are returned. Note that this can be used instead of the "Site Name" search field if the Complex name is known.

Name Authorities Search by Example

Name
When this field is filled out the system will search for any Name Authority records whose Family Name or Institution fields match, or that have Alternate Names whose Family Name or Institution fields match. All such Name Authority records are returned.

Country of Birth
The system will search for any Name Authority records whose Country field matches. All such Name Authority records are returned.

Classification Country
The system will search for any Name Authority records whose Classification Country field matches. All such Name Authority records are returned.

Image Sources Search by Example

Source Name/Title
The system will search for any Image Source records whose Source Name/Title field, Abbreviated/Alternate Title field, or Series Title field matches the value you entered. All such Image Source records are returned.

Author
The system will search for any Image Source records whose Author field matches the value you entered. All such Image Source records are returned.

Hollis #/Ref #
The system will search for any Image Source records whose Hollis #/Ref # field matches the value you entered. All such Image Source records are returned.

3.2 Index Term Search
An Index Term Search tab is available for Groups, Works, Surrogates, and Sites Search forms (see Figure 14). Scroll through the list of index terms on the left or type the first few letters of an index term in the Find box to navigate quickly through the list. By default, any index term in the list you click on will appear in the Include List on the right. The default search behavior is to find all records with any of the index terms in the Include List. The default behaviors can be changed for individual searches. Selecting the "Add to Exclude List" option below the list of index terms on the left will cause terms to be added to the Exclude List when clicked on, with the result being that the search ignores records with these terms attached. Clicking on the "And" options to the left of the Include and Exclude Lists will also affect the search behavior. Instead of finding (or excluding) records with any of the selected terms, the search will find (or exclude) only records
with all of the selected terms. To remove terms from the Include or Exclude List, simply click on them. When the index term search is formatted as you desire, click the **Find** button to display the list of records retrieved.

**Figure 14. Index Term Search tab**

3.3 Set Search

For Groups, Works, Surrogates, and Sites, you can retrieve a pre-defined set of records. The list of available sets is shown on the Sets tab (see Figure 15). Highlight a set name and click the **Find** button to display the list of records contained in that set.

Sets are created and modified using the **Sets...** drop down list on the return list or the full record screen. See the description of the **Sets...** drop down list in Section 4.2 for more information on sets and how they may be manipulated.
3.4 Search Editor

The search form for each record type has a Search Editor tab. This tab gives access to DataStrike™, third party software created by Soft Solutions, Inc. that enables you to construct your own queries independent of the limits placed on the other search techniques described above. The Search Editor tab is shown in Figure 16. The box along the top (the Query area) automatically displays the query as you construct it. Below this to the left is the Table list, a drop down list that allows you to select a table. Below the Table list is the Field list, a scrollable list of all the fields for the table selected in the Table list. From these two lists, select the table and field you want to search, then select the comparison operator from the list of comparison operators to the right. Finally, type the desired value (or in the case of a boolean field, select "True" or "False") in the box that appears below these lists in the Value area. In certain cases the Function button (labeled $Fx$) can be used to insert a function instead of a specific value. Functions can only be used with tables that have a many-to-one relationship with the primary table being searched. The function calculates an aggregate value for all the records in the many table related to a single record in the one table. If you click on the Function button and a function is allowable, a window will appear that will let you select the function you desire to use.

Multiple tables and fields can be searched, and multiple constraints can be placed on the same field by adding lines to the query. This is done by clicking the Add Line button (or the Insert Line button if you wish the new line to come before the currently selected line in the Query area). The relationship between lines is And by default. The relationship can be changed by highlighting the line in the Query area and clicking one of the other buttons below the Value area (Or or Except).

Furthermore, this tab gives you the option to save and retrieve queries using the Save… and Load… buttons in the Filter section at the bottom left of the tab. Clicking Save… brings up a Save Filter dialog box that allows you to name the query and provide a description of what the query does. If the name you choose is the same as that of a pre-existing saved query, you will be given the option of replacing the old one or canceling the operation. Clicking Load… brings up the Query Filters dialog box that shows a list of all the
filters saved for the main table you are searching. Clicking the toggle flag will broaden the dialog box to show the description associated with each query that you highlight. Note that this dialog box also gives you the option to delete saved queries. Saved queries can be loaded, edited, and then saved again under the same or a new name.

Figure 16. Search Editor tab

3.5 General Features

At the bottom of every tab on the search forms are drop down lists that control functions that apply no matter which of the above search techniques is used.

Figure 17. General features of Search forms

Refine Selection

The search forms for all tables contain a Refine Selection drop down list that allows you to indicate how the search results affect the current selection of that table.

- Create New Current Selection - default behavior. This replaces the current selection (if any) with the results of the search.
- **Add to Current Selection** - This causes the results of your search to be combined with the current selection.

- **Search Within Current Selection** - This causes your search to be performed only upon the records in the current selection, instead of all the records in the table. The return screen shows only the records that match.

- **Remove Results from Current Selection** - This also causes the search to be performed only upon the records in the current selection. However, any matching records are removed from the selection, so the return screen shows only the records that don't match.

Note that the last three options only make sense if there already exists a current selection (i.e. you have performed at least one search on the table). If no current selection exists you will not be allowed to select one of these options.

### Default Return Screen

The search forms for Groups, Works, Surrogates, and Sites provide a drop down list that enables you to select the format in which the search results are presented. There are three formats: text-only list, thumbnails in list format, and a grid of thumbnails. The text-only list shows only a single line of text for each record. The thumbnails in list format also shows a single line for each record, but since a thumbnail of the primary image associated with the record is included in the line fewer records can be displayed on a single screen. The grid of thumbnails allows you to scan many thumbnails at a time. Minimal textual information about each record is included (for example, in the grid of thumbnails for Works records only the first Classification Number and the Work Title are shown). Note that a newly selected return screen format becomes the default format for all return screens for the remainder of the session or until a new default format is selected.

See [Chapter 4](#) for more information about return screens.
Chapter 4. Search Results: Return Screens

When a search is performed, the records found are displayed on a return screen. In order to view or edit one of the records that appears in a return screen, simply double click on it.

The records displayed in a return screen may be sorted according to the values in a field by clicking on the column header for that field (if that field is included as a column on the return screen) or by using the Sort Editor (described in Section 4.2).

4.1 Types of Return Screens

As indicated in Section 3.5, there are three different types of return screens: text-only, thumbnails in list format, and grid of thumbnails. You can choose which format to display records in on the Search form or on the return screen.

All six record types can display search results in the text-only format. An example of this format is shown in Figure 18. Each line summarizes one record, with multiple fields from the record being included in the line.

The four major record types (Groups, Works, Surrogates, and Sites) can also display search results in the thumbnails in list format (see Figure 19). Again, each line summarizes one record, with the same fields included as are in the text-only list. However, since each line now includes a thumbnail as well, fewer records can be displayed per screen. Note that only the primary image associated with each record is displayed.

In addition, the four major record types can display search results in the grid of thumbnails format (see Figure 20). Each thumbnail is accompanied by a minimal amount of textual information. For example, for Work records the Classification Number of the first local information record associated with the record and the Work Title are displayed.

In the first two display formats, selected records are indicated by a shadowing of the entire row for each record. In the grid of thumbnails format, a "highlighted record" is indicated by the presence of a red rectangular border around the thumbnail and associated textual information.

Figure 18. Return list: text-only format
Figure 19. Return list: thumbnails in list format

- 4 columns
- 3 rows
- Timestamps: 1900s - Current
- Dates: 1900 - 1999
- Artist: Moké, Simon
- Title: "Mebulu le Bandundu" (paint on canvas)
- Country: Congo
- Culture: Contemporary

Figure 20. Return list: grid of thumbnails format

- 5 columns
- 3 rows
- Timestamps: 1900s - Current
- Dates: 1980 - 1990
- Artist: Moké, Simon
- Title: "Mother and her First Daughter" (oil on canvas)
4.2 Functions of Buttons and Drop Down Lists on Return Screens

Each of the return screens has a row of buttons and drop down lists along the lower edge that provide you the means by which to manipulate the records in the list. Their functions are explained below:

**Done**

Clicking the **Done** button clears the current selection and returns you to the main OLIVIA screen.

**Search**

This button will display the search form for the current table. The search you perform can replace the current selection of records with a new one or refine the current selection (as described in Section 3.5). Canceling the search form will cause the current selection to redisplay.

**Sort Editor**

*Note:* records may be sorted by any of the fields displayed in columns on the return screen simply by clicking on the appropriate column header. For the grid of thumbnail display formats, the fields that appear in columns in the other display formats are included in a drop down list labeled **Sort...**. The grid of thumbnail records can be sorted by any of these fields by selecting it from this drop down list. The Sort Editor functionality described here is included as the last option on that list.

Clicking this button brings up the Sort Editor (Figure 21), which you can use to specify your own sorting criteria. You can specify the direction of the sort (i.e. ascending or descending) and multiple fields to sort by (for example, sort first by Classification Country, and in the case of duplicate values within this field sort the records by SortName). On the Order By dialog box, highlight a field by which you wish to sort the records in the list of field names on the left side of the dialog box. Refer to the Data Dictionary [Appendix E](#) if you are unsure which fields you need to use.

**Figure 21. Order By dialog for specifying custom sorts**

![Order By dialog](image)

The > button transfers the highlighted field into the **Ordered by Fields/Formulas** list on the right side of the dialog box. To remove a field from this list, highlight it and press the < button. The << button clears all fields from the list. If you include multiple fields in the **Ordered by Fields/Formulas** list, the records will first be
sorted by the field at the top of the list. If records have identical values within this field, those records will be
further sorted by the next field on the list, and so on.

The up or down arrowhead beside each field in the Ordered by Fields/Formulas list signifies whether the field is
sorted in ascending or descending order, respectively. Clicking on the arrowhead will change its direction,
and thus change the direction of the sort. Different fields may be sorted in different orders.

The Add Formula… and Modify… buttons below the Ordered by Fields/Formulas list enable you to sort
records by the results of certain operations taken upon fields. Any but the most basic formulas will most
likely require use of the 4D Language reference manual or a 4D programmer. Contact the OLIVIA Help
Desk if you feel you have need of such assistance.

When you have finished choosing fields, click the Order by button to perform the sort. The records on the
return screen will be sorted by each of the fields in the Ordered by Fields/Formulas list, in the order they appear.
Note that if you sort on a field which is not displayed in the Return List, the sort is still performed but the
resulting record order may not be obvious.

Note that the Sort Editor can not use text fields (denoted in the list of Available Fields by an icon that
resembles a page of text) in a sort, even though it is possible to place text fields in the Ordered by
Fields/Formulas list. Doing so will simply have no effect on the order of records.

Subsets…

You can use the options on the Search form to refine the returned selection (see Section 3.5). However, you
can also modify the selection to some extent from the return screen itself via the Subsets… drop down
menu.

Show only selected records
This option changes the selection so that it consists only of the records you have highlighted.

Show only unselected records
This option changes the selection so that it consists only of the records you do not have highlighted.

Return Screen Format

This drop down list shows the name of the current return screen format. Use the list to select a different
format, which will then become the new default. Of course, this is available only on the return screens for
record types that are able to display search results in different formats, i.e. Groups, Works, Surrogates, and
Sites.

Print

There are many options for printing, some of which depend on the type of records being viewed. The
different options are described below:

Quick Report
This calls up an internal 4D tool for creating ad hoc printing reports. The official documentation for
this tool is provided as Appendix C of this document. This tool provides greater flexibility than the
standard printing options, but it also has some limitations. For example, reports created in this way
should use only fields from the table to which the records belong.

Print screen(s)
You can print the return screens for the current selection using this option. Note that only the
information that shows up on the return screen is printed. You will be given the opportunity to
specify text that will appear in the header of each page that is printed, and then the chance to change any printer settings that you desire. Note that the orientation for these printouts should be landscape.

Print full record(s)
This will print the full details for each of the highlighted records. This option is also available from the detail form for the record. The header is provided by default, though you are given the opportunity to adjust printer settings. The orientation for these printouts should be portrait.

Thumbnail Report
This will print the thumbnail images and minimal text information associated with each record you currently have highlighted. This printing option is available only for record types that can have thumbnails associated with them, i.e. Groups, Works, Surrogates, and Sites. This functionality is different from Print screens for a grid of thumbnails in that all the thumbnail images associated with each record are included in the report as opposed to just the primary image for each record.

Slide labels
Slide labels can be constructed for Surrogate records by combining information from several fields in the record. These slide labels can be printed out using this option. The printing formats are specific to particular repositories and so will most likely not work elsewhere. If you have a need for slide labels, contact the OLIVIA developers.

Sets
A set is a collection of records from a table. This collection of records is given a name and can be made public so that other catalogers may work with it, or kept private so that only you have access to it. Note that making a set private does not in any way hide the records that belong to that set. These records can still be edited by other catalogers and may even belong to other sets. However, the membership and name of a private set can not be changed by anyone other than the owner.

The main use for sets is in the scanning process. Following the Digital Imaging Projects Workflow document (see Appendix D), the records representing all items submitted for scanning at one time comprise a batch. Specifically, a batch is composed of all sets with the same name and that name is assigned to the batch. Thus a batch can contain records from different tables. For example, if there was a set for the Surrogates table and a set for the Works table with the same name, then the batch with that name would contain those Surrogate and Work records.

When a batch is submitted for scanning the sets within that batch are locked. This is an attempt to assure the continued accuracy of the information generated by OLIVIA for the scanning personnel about the records in the batch. Locking sets prevents their membership from being changed (i.e. records can not be added to or removed from the sets) and prevents them from being deleted. However, be aware that while the sets themselves may not be changed while locked, there is nothing to prevent the records belonging to a set from being edited while the set is locked.

Although it is possible to unlock sets in a batch, 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.

Set functionality is available for only the four major tables: Groups, Works, Surrogates, and Sites.
Create a new set
A new set is created by highlighting the record(s) you wish to include and then selecting this option from the Sets… drop down list. A dialog box will appear with a list of all existing sets for the table you are currently in and ask you to provide a name for the new set. Note that names of private sets will appear in the list on this form. This is so you can avoid trying to use any name that has already been assigned.

Add records to a set
Records can be added to any public set or private set of which you are the owner by highlighting the desired records and selecting this option. A dialog box will appear with a list of all sets that you are able to modify. Select the name of the set to which you wish to add the highlighted records and click the OK button. If all of the highlighted records are already included in the set, they will not be added again and a message will inform you of this condition. Note that in the situation where some of the highlighted records are already in the set while some are not, the ones that are not will be added to the set and no message will be generated.

Remove records from a set
Records can be removed from any public set or private set of which you are the owner by highlighting the desired records and selecting this option. A dialog box will appear with a list of all sets that you are able to modify. Select the name of the set from which you wish to remove the highlighted records and click the OK button. If none of the highlighted records are in the set, a message will inform you of this fact. As above, in the situation where some of the highlighted records are in the set while some are not, the ones that are in will be removed and no message will be generated.

Retrieve a set
The records belonging to a specific set can be loaded as the current selection by choosing this option. A dialog box will appear with a list of all sets that you are able to access. Select the set whose records you wish to view and click the OK button. Note: if for any reason you wish to somehow combine the records of two or more sets (for example, to show all the records that belong to one set but not another), click the Search button to recall the search form and use the Set Search tab in conjunction with the Refine Selection drop down list.

Delete a set
You can delete a set by selecting this option. A dialog box will appear with a list of all sets that you are able to modify. Select the set you wish to delete and click the OK button. Note that the records included in the set are unaffected by the deletion of the set itself. Also note that it is possible to delete a set someone else has created and made public. Please exercise care in using this option.

Modify attributes of a set
You can change the name and/or the public status of a set with this option. A dialog box will appear, as shown in Figure 22. On the left will be a list of all sets that you are able to modify. Select the set whose attributes you wish to change and its modifiable attributes will appear on the right side of the window. Make the desired changes and click the Save changes button. Again, note that it is possible to change the attributes of a set someone else has created and made public, so please exercise care in using this option. Also note that it is not possible to unlock a set with this option. Instead, go to Batch Image Processing under the Admin menu on the main screen.
Attach Index Terms

The same index terms can be simultaneously assigned to a number of records via this button. Clicking on this button will bring up a window (Figure 23) that has a list of all possible index terms on the left. Clicking on an individual term causes it to be displayed in the list on the right, which keeps track of the index terms that are to be assigned to all the highlighted records. Terms can be removed from this list by clicking on them.

Note that this functionality is available only for those tables whose records can have index terms assigned, i.e. Groups, Works, Surrogates, and Sites.

Delete

Clicking this button will cause the highlighted record(s) to be deleted. With certain types of records, you will be given the opportunity to transfer links with other types of records to another record of the same type. For
example, if you want to delete a Name Authority record that is linked with a number of Work, Group,
Surrogate, and Site records you will offered the opportunity to transfer these links to other Name Authority
records. All links with a certain type of record must be transferred to the same record or not transferred at
all, but it is not the case that all links must be transferred to the same record. In the example described
above, all links with Work records may be transferred to only one other Name Authority record if they are
transferred at all, but at the same time the links with Group records could be transferred to an entirely
different Name Authority record if desired.

This functionality is available only to Administrators. Currently, this feature is implemented only for
Surrogate, Site, Name Authority, and Image Source records. It should be noted that if a corresponding record
has previously been exported to the VIA database it will be difficult to remove it from VIA if the OLIVIA
record is deleted. It is recommended that you remove the record from VIA before deleting the OLIVIA
record. Note that simply unchecking the VIA checkbox on a record will not instantaneously cause the record
to be removed from VIA.

**Surrogate records - Delete**

Unlike Site, Name Authority, and Image Source records, Surrogate records are simply deleted. With
one or more records on the return screen selected, click this button. You will be asked to confirm
your decision to delete the records. If you do so, the Surrogate records will be removed from the
OLIVIA database.

**Name Authority records - Merge/Delete**

Unlike Surrogates, only one Name Authority record can be deleted at a time. This is because you are
given the opportunity to transfer the links with any Group, Work, Surrogate, or Site records from the
record to be deleted to another Name Authority record. After highlighting a Name Authority record
and clicking the **Delete** button, a window with the title "Merge Name Linking Records" appears (see
[Figure 24](#)). This window informs you how many of each type of record that can be linked to a Name
Authority record are actually linked, and there is a set of radio buttons for each type that allows you
to specify whether those linking records should be deleted or transferred to another Name Authority
record, whose NameID you will have to provide. Note that, for example, deleting the linking record
to a Work does not cause the Work record itself to be deleted. After indicating how all the available
linking records are to be dealt with, click the **Merge** (or **Cancel**, if you've changed your mind)
button. The linking records will be either deleted or transferred as you've indicated, and then the
Name Authority record itself will be removed from the OLIVIA database.

**Figure 24. Window for merging Name Authority records**

```
<table>
<thead>
<tr>
<th>Merge Name Linking Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Saint-Non, Jean Claude Richard de</td>
</tr>
<tr>
<td>Dates: 1727 - 1751</td>
</tr>
<tr>
<td>City: France</td>
</tr>
<tr>
<td>Country: France</td>
</tr>
<tr>
<td>ID: 11286</td>
</tr>
<tr>
<td>Existing Relationships:</td>
</tr>
<tr>
<td>1 Link(s) to Work Records</td>
</tr>
<tr>
<td>0 Link(s) to Group Records</td>
</tr>
<tr>
<td>0 Link(s) to Site Records</td>
</tr>
<tr>
<td>0 Link(s) to Surrogate Records</td>
</tr>
<tr>
<td>Delete</td>
</tr>
<tr>
<td>Delete</td>
</tr>
<tr>
<td>Delete</td>
</tr>
<tr>
<td>Delete</td>
</tr>
<tr>
<td>Delete</td>
</tr>
</tbody>
</table>
```

Revised 6-Apr-00
**Image Source records - Merge/Delete**
This function works much like the Merge/Delete function for Name Authority records described above.

**Site records - Merge/Delete**
This function works much like the Merge/Delete function for Name Authority records described above. The difference is that Local Information records may be transferred as well as linking records. Note that the OLIVIA system prevents a record from having more than one Local Information record from any one repository. Thus you cannot successfully transfer a Local Information record associated with a given repository to a Site record that already has a Local Information record associated with that repository. If you attempt to do so, the Local Information record you are trying to transfer will simply be deleted.

### 4.3 Commands Available from Menus on the Return Screen

**Windows**

**View Windows**
This menu item presents a list of all windows that are open within OLIVIA and allows you to choose which to bring to the top of the desktop. This is useful if you have multiple windows open and one has become lost behind others (as may happen when viewing images linked to records). This function is also available under the **File** menu.
Chapter 5. Entering and Editing Records

There are many ways to create a new record. The most common is to select the New Record type option from one of the Record type menus on the main screen. Upon doing so you are presented with the full detail screen for the appropriate record type, which you can then fill out with the appropriate cataloging data. You can also use a template to create a new record by selecting the New Record type From Template option from one of the Record type menus (use of templates is described in more detail in Section 5.3). You may also be given the option of either creating a new record from scratch or by using a template when you attempt to link one record to another. See the documentation on Linked Records in Section 5.2 below.

There are also multiple ways to open a record for editing. The most common is to select the View or Modify Record type option from one of the Record type menus on the main screen, enter a search (as described in Chapter 3), and on the return screen showing your search results double click on one of the records. The full detail screen for that record will appear and you can edit it as necessary. You can also get to the detail screen for a record that is linked to another record from the detail screen for this other record by selecting the appropriate linking record and clicking on the View Record button. See the documentation on Linking Records in Section 5.2 below.

5.1 Elements of the Full Detail Screen

The full detail screen for a Work record is shown in Figure 25. The detail screen can be divided into three parts: the Record Identification Area, the Data Entry Pages, and the Navigation Area. These sections are delineated in the figure and described in more detail below.
Record Identification Area

The top area of the detail screen contains mostly non-enterable fields with information that tends to uniquely identify the record. There are a few exceptions where objects in this area may be clicked on or data entered:

- Records that have a primary image associated with them show a thumbnail image in the upper right corner of the record identification area. Clicking on this thumbnail will open up a new window in which the full image can be viewed. If this window should become hidden behind other windows, the View Windows option under the Windows or File menu will give you the means to bring it back to the front.
- The record identification area of the detail screen for Surrogate records has a button (labeled Group Information, Work Information, or Site Information) that loads the detail form for the Group, Work, or Site record that is linked to that Surrogate record. Note that if a Surrogate record is not linked to a Group, Work, or Site record then no button appears in the record identification area.
- Name Authority records have a radio button in the record identification area which the cataloger uses to indicate whether the record is for an individual or a corporate entity.

Data Entry Pages

These are the tabs on which the cataloger enters information for the record. The number and content of the tabs will vary depending on the type of record being shown. You can switch between pages by clicking on the tab labels along the top of this section, or by using the Change Page buttons located in the navigation area of the screen (see below). More information on the types of fields on the data entry tabs is included below in Section 5.2.

Navigation Area

The navigation area is located along the bottom of the detail screen. Despite its name, it contains functionality unrelated to navigation and information about when and by whom the record was created and last modified.

Change Record buttons

These record navigation buttons allow you to view other records with the detail screen without having to return to the search results screen and double click on another record. From left to right, the buttons will load the first record in the list, the record in the list immediately before the one you are currently viewing, the record in the list immediately after the one you are currently viewing, and the last record in the list. Note that using these buttons causes any changes to the record you were viewing to be automatically saved.

Change Page buttons

These page navigation buttons allow you to switch sequentially between the tabs in the data entry section of the detail screen.

Repeatable Field addition (+) and deletion (−) buttons

In order to add entries to or delete entries from repeatable fields (see Section 5.2), you need to click on the Repeatable Field addition or deletion buttons. These are the plus (+) and minus (−) signs between the Change Page buttons and the Cancel and Accept buttons. In order to add an entry, first click on the repeatable field so it has focus (indicated by the blinking black triangle at the upper left corner of the field). Then click on the + button. Note that if the repeatable field already has an entry, clicking on that entry will enable that entry to be edited directly. Clicking on the + button will not add a new entry in this case. To delete an entry, click on it and then click on the − button.
Accept and Cancel buttons

When you want to save the changes you have made to a record, click on the Accept button. If you do not wish your changes to be saved, click on the Cancel button. What happens next depends on where you were before viewing the detail screen. If you had selected the New Record type or the New Record type From Template option from one of the Record type menus you will be presented with another blank detail form or one with the same template information filled in. If you do not wish to enter another record, simply click on the Cancel button and you will be returned to the main screen. If you were creating a new record while attempting to link a record, you will be returned to the linking record form. If you were editing a record from a return screen, you will be presented with the return screen again. If you had arrived at the detail form by clicking the View Record button for a linked record on another detail form, you will be returned to that other detail form.

Note: clicking Cancel will negate all changes you have made only if entering a new record. If you are editing a pre-existing record, clicking Cancel will only negate changes made to the main table itself (for example, the Works table if you were editing a Work record). All changes to related tables (for example, repeatable fields and linking records) will remain. Chapter 6 and the data dictionary (Appendix E) may assist you in determining whether a field from the detail screen is part of the main table or a related table.

Print full record button

This button has almost the same function as the Print full record(s) option on the Print… drop down menu on the return screen (see Section 4.2). The differences being that only the current record is printed and you are given the opportunity to specify a header that will appear at the top of the printed pages.

Sets… drop down menu

This drop down menu gives you almost the same options available from the Sets… drop down menu on the return screen (see Section 4.2). The difference is that only the record current shown in the detail form can be added to or removed from a set, and sets can not be retrieved.

5.2 Types of Data Fields

Although the distinctions are not always clear, it can be helpful to think of data fields being split into different classes. Currently, there are Normal, Controlled Vocabulary, Repeatable, Linked Records, Subordinate Records, and Others, each described below.

Normal

For lack of a better descriptor, fields that you can just click on or tab into and type a value are called Normal fields. The values of these fields are stored in the main tables for the record type that you are currently editing.

Controlled Vocabulary

Some fields are restricted to having values that belong to a specified list of possible values. When you click on or tab into one of these fields, a dialog box with the list of possible values will appear. You can scroll through this list to find an appropriate value or type the first letter (or letters, if in quick succession) of the desired value to be taken directly to that portion of the list. Both Normal and Repeatable fields may use controlled vocabulary, as well as fields within linking records or subordinate records. Currently, there is no visible emblem that distinguishes fields that use controlled vocabulary from other fields. Note that
Administrators have the ability to edit some of the lists of controlled vocabulary (see the description for the Vocabulary List Maintenance option under the Admin menu in Section 2.2).

Repeatable

Some fields can have multiple separate values for each record. These fields use the + and – buttons from the navigation area of the detail screen to add and remove values (described in more detail in Section 5.1). On the detail forms a repeatable field appears as a scrollable list with a header identifying the name of the field. Repeatable fields are stored in tables that are separate from the main tables.

Linked records

Many records can be linked to other types of records. Typically linking records are stored in a separate table and link to a record in each of two main tables. However, note that links to Surrogate records and Image Source records are made directly to those records themselves, not through intermediate tables. Figure 26 shows an example of a Group record that is linked to Name Authority, Site, and Work records. The different types of linking records and the buttons that affect them are described in more detail below.

Figure 26. Examples of Name, Site, and Work linking records for a Group record

![Figure showing examples of linking records]

Works

Work records can be linked to Group, Surrogate, Site, and Name Authority records. While links to all these types of records can be initiated from a Work record, only Group records can initiate a link to a Work record. Following are descriptions of the buttons that appear on the detail forms of records that can initiate the creation of links to Work records.
- **View Work**
  When a linked Work is highlighted, click on this button to see the detail form for that Work record. Note that this detail form is slightly different than the detail form you would otherwise see. This one does not show linked records or allow printing.

- **Link Work**
  After clicking on this button, you will be presented with a linking form. In the Work Title field, type in as much of the title as you desire and press the tab key. If the title you specify matches more than one Work record, a window will appear listing all the qualified Work records and allowing you to either choose one, return to the linking form in order to try typing in another title, or to create a brand new Work record. If the title you specify matches only one Work record, it will automatically be linked. If the title you specify does not match any Work records, you will be offered the option of creating a new Work record.

  After a Work record has been successfully linked, the remainder of the linking form can be filled out. When the **Accept** button is clicked, the linking record will be saved and a new blank linking form will be presented. If you wish to link another Work record, fill out this form. When you have linked as many Work records as you desire, click the **Cancel** button. You will be returned to the detail screen of the original record you were working on.

- **Unlink Work**
  Highlight the Work record you wish to unlink and click on this button to remove the linking record. Note that the Work record itself will be unaffected except for the loss of the linking record.

- **Modify Work Relationship**
  Highlighting a linked record and clicking this button will bring up the corresponding linking form. The fields on that form can be edited, even to the point of changing the Work record specified. After you are done editing, click **Accept** to save your changes or **Cancel** to negate them. In either case you will return to the detail screen of the record you were working on.

**Groups**

Group records can be linked to Work, Surrogate, Site, and Name Authority records. While links to all these types of records can be initiated from a Group record, only Work records can initiate a link to a Group record. Following are descriptions of the buttons that appear on the detail forms of records that can initiate the creation of links to Group records.

- **View Group**
  When a linked Group is highlighted, click on this button to see the detail form for that Group record. Note that this detail form is slightly different than the detail form you would otherwise see. This one does not show linked records or allow printing.

- **Link Group**
  After clicking on this button, you will be presented with a linking form. In the Group Title field, type in as much of the title as you desire and press the tab key. If the title you specify matches more than one Group record, a window will appear listing all the qualified Group records and allowing you to either choose one, return to the linking form in order to try typing in another title, or to create a brand new Group record. If the title you specify matches only one Group record, it will automatically be linked. If the title you specify does not match any Group records, you will be offered the option of creating a new Group record.

  After a Group record has been successfully linked, the remainder of the linking form can be filled out. When the **Accept** button is clicked, the linking record will be saved and a new blank
linking form will be presented. If you wish to link another Group record, fill out this form. When you have linked as many Group records as you desire, click the **Cancel** button. You will be returned to the detail screen of the original record you were working on.

- **Unlink Group**
  Highlight the Group record you wish to unlink and click on this button to remove the linking record. Note that the Group record itself will be unaffected except for the loss of the linking record.

- **Modify Group Relationship**
  Highlighting a linked record and clicking this button will bring up the corresponding linking form. The fields on that form can be edited, even to the point of changing the Group record specified. After you are done editing, click **Accept** to save your changes or **Cancel** to negate them. In either case you will return to the detail screen of the record you were working on.

**Sites**

Site records can be linked to Group, Work, Surrogate, and Name Authority records. Only Group and Work records can initiate a link to a Site record. Following are descriptions of the buttons that appear on the detail forms of records that can initiate the creation of links to Site records.

- **View Site**
  When a linked Site is highlighted, click on this button to see the detail form for that Site record. Note that this detail form is slightly different than the detail form you would otherwise see. This one does not show linked records or allow printing.

- **Link Site**
  After clicking on this button, you will be presented with a linking form. In the Site Name field, type in as much of the name as you desire and press the tab key. If the name you specify matches more than one Site record, a window will appear listing all the qualified Site records and allowing you to either choose one, return to the linking form in order to try typing in another name, or to create a brand new Site record. If the name you specify matches only one Site record, it will automatically be linked. If the name you specify does not match any Site records, you will be offered the option of creating a new Site record.

  After a Site record has been successfully linked, the remainder of the linking form can be filled out. When the **Accept** button is clicked, the linking record will be saved and a new blank linking form will be presented. If you wish to link another Site record, fill out this form. When you have linked as many Site records as you desire, click the **Cancel** button. You will be returned to the detail screen of the original record you were working on.

- **Unlink Site**
  Highlight the Site record you wish to unlink and click on this button to remove the linking record. Note that the Site record itself will be unaffected except for the loss of the linking record.

- **Modify Site Relationship**
  Highlighting a linked record and clicking this button will bring up the corresponding linking form. The fields on that form can be edited, even to the point of changing the Site record specified. After you are done editing, click **Accept** to save your changes or **Cancel** to negate them. In either case you will return to the detail screen of the record you were working on.
Surrogates
Surrogate records can be linked to Group, Work, and Site records, all of which can initiate a link to a Surrogate record. Following are descriptions of the buttons that appear on the detail forms of these records. Note that Surrogate records are different from the other records previously discussed in that there are no intermediate linking records between a Surrogate record and another record. Instead the other record links directly to the Surrogate record. Also note that each Surrogate record may be linked to only one other record at a time, though a Group, Work, or Site record may be linked to multiple Surrogate records.

- **View Surrogate**
  When a linked Surrogate is highlighted, click on this button to see the detail form for that Surrogate record.

- **New Surrogate**
  Clicking on this button brings up a blank detail form for a Surrogate record. You can then fill out the information for the new Surrogate record. Note that this record is automatically linked to the record you were originally working on.

- **Link Surrogate**
  After clicking on this button, you will be presented with a dialog box asking for the Accession Number of the Surrogate to which you wish to link the record to. If the Accession Number you enter matches a Surrogate record, it will be linked to the record you are working on. If the Accession Number does not match any Surrogate records, then you are informed of that condition.

- **Unlink Surrogate**
  Highlight the Surrogate record you wish to unlink and click on this button to remove the link. Note that the Surrogate record itself will be unaffected except for the loss of information about being linked to this record.

- **Make Primary Image**
  A Surrogate record may have a thumbnail image attached to it. In order to use this image as the primary image of the record to which the Surrogate is linked, highlight the linked Surrogate record and click on the **Make Primary Image** button.

- **Clear Primary Image**
  If you decide to clear the current primary image associated with a record, simply click on the **Clear Primary Image** button. Note that this does not affect the Surrogate record.

Names
Name Authority records can be linked to Group, Work, Surrogate, and Site records, all of which can initiate a link to a Name Authority record. Following are descriptions of the buttons that appear on the detail forms of these records.

- **View Name**
  When a linked Name Authority is highlighted, click on this button to see the detail form for that Name Authority record. Note that this detail form is slightly different than the detail form you would otherwise see. This one does not show linked records or allow printing.

- **Link Name**
  After clicking on this button, you will be presented with a linking form. In the Last Name field, type in as much of the name as you desire and press the tab key. If the name you specify
matches more than one Name Authority record, a window will appear listing all the qualified Name Authority records and allowing you to either choose one, return to the linking form in order to try typing in another name, or to create a brand new Name Authority record. If the name you specify matches only one Name Authority record, it will automatically be linked. If the name you specify does not match any Name Authority records, you will be offered the option of creating a new Name Authority record.

After a Name Authority record has been successfully linked, the remainder of the linking form can be filled out. When the Accept button is clicked, the linking record will be saved and a new blank linking form will be presented. If you wish to link another Name Authority record, fill out this form. When you have linked as many Name Authority records as you desire, click the Cancel button. You will be returned to the detail screen of the original record you were working on.

- **Unlink Name**

  Highlight the Name Authority record you wish to unlink and click on this button to remove the linking record. Note that the Name Authority record itself will be unaffected except for the loss of the linking record.

- **Modify Name Relationship**

  Highlighting a linked record and clicking this button will bring up the corresponding linking form. The fields on that form can be edited, even to the point of changing the Name Authority record specified. After you are done editing, click Accept to save your changes or Cancel to negate them. In either case you will return to the detail screen of the record you were working on.

- **Make Display Name**

  A Group or Work record linked to a Name Authority record has a display name attached to it, automatically composed of the individual elements of the entity's name and its relationship to the Group or Work. In order to use a particular Name Authority record to generate the display name, highlight that record and click on the Make Display Name button. Note that this feature is available only for Group and Work records.

- **Clear Display Name**

  If you decide to clear the current display name, simply click on the Clear Display Name button. Note that this does not affect the Name Authority record or the linking record. This feature is available only for Group and Work records.

**Image Source**

In Surrogate records and in Local Information records for Group, Work, and Site records, there is a field labeled Image Source. This actually links to an Image Source record, though the appearance is very different than for any of the other types of linking records. In the entry box for this field, type in as much of the name of an image source as you desire and press the tab key. If the name you specify matches more than one existing Image Source record, a window will appear listing all the qualified Image Source records and allowing you to either choose one, return to the previous form in order to try typing in another name, or to create a brand new Image Source record. If the name you specify matches only one Image Source record, it will automatically be linked. If the name you specify does not match any Image Source records, you will be offered the option of creating a new Image Source record. The field label is actually a button that, when clicked, loads the detail screen for the Image Source record.
Note: In order to unlink an Image Source record, merely delete the title from the field and move the cursor to another field. All information related to the previously linked Image Source record will be cleared from the record.

Subordinate Records
Although contained in separate tables like the linking records described above, these records link only to one of the main tables. They can only be created while within the detail form of a record in one of the main tables.

Local Information
Local Information records are created for Group, Work, and Site records from within those records. Following are descriptions of the buttons that appear on the detail forms of these records. Note that a Group, Work, or Site record may have multiple Local Information records, but only one Local Information record for each repository.

- View/Modify Local Information Record
  When a linked Local Information record is highlighted, click on this button to see the detail form for that Local Information record. The fields of the Local Information record can then be edited.

- New Local Information Record
  Clicking on this button brings up a blank detail form for a Local Information record. You can then fill out the information for the new Local Information record. This record is automatically linked to the record you were originally working on. Note that if a Local Information record already exists for your repository, you will not be allowed to create a new one.

- Delete Local Information Record
  Highlight a Local Information record and click on this button; the corresponding Local Information record will be deleted.

Image records
Like Local Information records, Image records are created for Work, Group, and Site records from within those records. Following are descriptions of the buttons that appear on the Images tab on the detail forms of these records.

- View Image
  When a linked Image record is highlighted and this button is clicked, the image associated with the record is displayed in a separate window. If this window should become hidden behind other windows, the View Windows option under the Windows or File menu will give you the means to bring it back to the front.

- Add Record
  Clicking on this button brings up a blank detail form for an Image record. You can then fill out the information for the new Image record. This record is automatically linked to the record you were originally working on. Note that in filling out this record, an image is not specified. Images are associated with image records either individually by using the Link Image button (available on this detail form or as a separate button on the Images tab) or en masse with the Retrieve Images function available under the Batch Image Processing option in the Admin menu on the main screen.
- **Modify Record**
  When a linked Image record is highlighted, click on this button to see the detail form for that Image record. The fields of the Image record can then be edited.

- **Delete Record**
  Highlight an Image record and click on this button; the corresponding Image record will be deleted.

- **Link Image**
  Clicking on this button brings up a window that allows you to specify the URL of the image to be associated with the highlighted Image record. Enter the URL and then click on the Link button. Alternatively, you have the option to retrieve an associated image from the Digital Repository Service (DRS) by clicking on the **Acquire from Repository** button. Note: As of version 1.2, this functionality requires the installation of an Oracle™ client on your machine. Contact the OLIVIA Help Desk for assistance in this matter.

- **Make Primary Image**
  An image record may have a thumbnail image attached to it. In order to use this image as the primary image of the record to which the Image record is linked, highlight the Image record and click on the **Make Primary Image** button.

- **Clear Primary Image**
  If you decide to clear the current primary image associated with a record, simply click on the **Clear Primary Image** button. Note that this does not affect the Image record with which the image was originally associated.

**Alternate Names**
Alternate Name records are only created for Name Authority records. Following are descriptions of the buttons that appear on the Corporate and Individual tabs on the detail form for Name Authorities.

- **View/Modify Alternate Name Record**
  When a linked Alternate Name record is highlighted, click on this button to see the detail form for that Alternate Name record. The fields of the Alternate Name record can then be edited.

- **New Alternate Name Record**
  Clicking on this button brings up a blank detail form for an Alternate Name record. You can then fill out the information for the new Alternate Name record. This record is automatically linked to the record you were originally working on.

- **Delete Alternate Name Record**
  Highlight an Alternate Name record and click on this button; the corresponding Alternate Name record will be deleted.

**Others**
There are a few data fields that do not fit neatly into the categories described above (Normal, Controlled Vocabulary, Repeatable, Linked Records, or Subordinate Records). These are described below.
Notes
For Groups, Works, and Sites records, there are many different types of Notes that can possibly be added. This is accomplished with one text entry area accompanied by a scrollable list and a drop down menu. The scrollable list shows the list of Note types that are already associated with the record. Clicking on one of these Note types causes the contents of that Note to appear in the text entry box, where it can be edited. The drop down menu contains a list of all possible Note types. To add a new Note to a record, select the appropriate Note type from the drop down menu. The text entry area will become blank. The Note can then be typed into the text entry area. Notes can be deleted by highlighting the Note type in the scrollable list and clicking the Delete Note Field button.

Index Terms
Group, Work, Surrogate, and Site records can have index terms attached to them. There is a list of all possible index terms available on one of the data entry tabs. Index terms are assigned to the record by clicking on them. They will appear in the adjacent scrollable list. Index terms can be removed from the record by clicking on them in this scrollable list. Index terms can be edited and added by Administrators via the Index Term Maintenance tool available under the Admin menu on the main OLIVIA screen.

Slides
Surrogate records have an area where you can enter information that would appear on slide labels. There is a separate text entry box for the slide top and bottom. Below each of these text entry boxes is a box that will show a preview of how the slide label would appear if printed. If you need to have slide labels generated from data in a format specific for your repository, please contact the OLIVIA developers.

5.3 Creating, Editing, and Using Templates
Note: As of version 1.2 the templating function is available for Works. It will soon be made available for Groups, Sites, and Surrogates as well.

Templating is the ability to create false records ("false" in the sense that they do not describe any one Work, Group, Site, or Surrogate and are not stored in the tables for those records, but do have many of the same fields) that contain information that will remain constant in a number of real records. The template record is then used as the basis of new records so that this information will not have to be repeatedly entered by hand or by use of the copy/paste technique.

Templates have almost all the fields that are available in the corresponding true records. However, there are some fields that are not available in templates. A list of these fields and other restrictions is provided below:

Work Templates:
- IncludeInVIA (the VIA checkbox) is not available.
- Surrogates can not be linked to these template records.
- Linking records for Name Authorities do not have the Notes field available.
- Thumbnail images can not be linked to Image records in these template records.
Templates can be manipulated through a number of options under the record type menus on the main OLIVIA screen: Create Template, Modify Template, and New Record type From Template. These are described in Section 2.2 and in more detail below:

**Create Template**

After choosing this option, a form very similar in appearance to the detail form for the corresponding record type will appear (see Figure 27). The form will have a header that indicates it is for a template rather than a true record. Furthermore, fields that are available for true records but not for templates will not be present on this form.

**Figure 27. Detail form for Work Template**

![Detail form for Work Template](image)

You will be able to add information just as if you were creating a new record, with the exception of fields that are not available for templating, of course. However, you should take care to enter only information that is common to a number of records that have yet to be created, or else the purpose of the template will be defeated. It should be noted that the minimum record requirements for records in tables linked to the main record must be met, but not those for the main record itself. Thus, for example, you will not be able to create a Local Information record in the template without filling in one of the required Local Information fields, but you will be able to create a Work template without entering a Work title. Note that you will be able to link the template record to existing main records (e.g. Groups, Name Authorities, Image Sources etc.) but you will not be able to create new main records from within the template.

When you are finished with the template, you may click either the **Cancel** button or the **Accept** button. Clicking the **Cancel** button will cause the template creation process to be cancelled and return you to the main OLIVIA screen. Clicking the **Accept** button will cause the appearance of a small window (Figure 28) that will ask you to assign a name to the template and specify whether or not it will be publicly available. The names and creators of all other templates for the same record type will be shown in this window. You may
assign a new name or use the name of another template you have created. If you choose an existing name, the old template with that name will be overwritten by the new one. You specify the public/private status of the template with the checkbox located below the name-assignment box on the form. Publicly available templates can be used by other catalogers to create records or as the basis for new templates. However, regardless of whether a template is public or private only its creator or any Administrator-level user may delete it.

Figure 28. Template Selection / Name Assignment

Once a name has been assigned and the public/private status specified, click the OK button. If you have chosen an existing name, the system will at this point ask you to explicitly confirm your choice to overwrite the old template. The template record is saved and you are returned to the main OLIVIA screen.

Modify Template

After selecting this option, a small window will appear [Figure 28]. This window will list the name and creator of each of the templates available. After choosing a template to use, the detail form for templates will appear with all the information previously entered for that template. You may then add or change whatever information you wish.

When you are finished making changes to the template, you may click either the Cancel button or the Accept button. Clicking the Cancel button will cause any changes to the template to be discarded and return the user to the main OLIVIA screen. If the Accept button is clicked the window for naming the template and specifying its public/private status will appear [Figure 28]. As in the procedure for creating new templates, the names of all other templates for the same record type will be shown in this window. The original name of the template you chose to modify will appear as the default choice. You may choose to keep this same name for the template if you were its creator (in which case the original template will be overwritten by the modified one). Otherwise you will receive an error message telling you that you cannot overwrite the template) or to assign a new name (in which case the original template will still exist under the original name and the modified template will be stored under the new name).
Once a name has been assigned and the public/private status specified, click the **OK** button. If you have chosen to keep the existing name, the system will at this point ask you to explicitly confirm your choice to overwrite the old template. The template record is saved and you are returned to the main OLIVIA screen.

**New Record type From Template**

To create a new record using a previously defined template, choose this option from the menu for the type of record you want to create. A small window will appear [Figure 28]. This window will list the name and creator of each of the templates available. After choosing a template to use, the detail form appropriate to the record type will appear with all the information previously entered for that template. You can then add any information specific to the record to be created. The template will be unaffected by any of these changes.

Once the cataloger is finished editing the record, she may click either the **Cancel** button or the **Accept** button. These buttons will have the same effects as they do on the detail form appropriate to the record type when creating a record from scratch, i.e. either cancel the record creation or accept the new record. If you choose **Cancel**, you will be immediately returned to the main OLIVIA screen. If you choose **Accept**, the record will be saved and another one based on the same template will appear, ready for editing.

**Deleting Templates**

This is not a menu option. Instead this functionality is available through a button on the small window that appears when you choose a template to use or modify or which you use to assign a name when saving templates [Figure 28]. On this window, select the template to be deleted and click the **Delete** button. You will be asked to confirm your decision to delete the template. Note that you may only delete a template if you are its creator or an Administrator-level user. In all other cases you will receive a message informing you that you do not have permission to delete the template.

### 5.4 Commands Available from Menus on the Detail Screen

**Windows**

**View Windows**

This menu item presents a list of all windows that are open within OLIVIA and allows you to choose which to bring to the top of the desktop. This is useful if you have multiple windows open and one has become lost behind others (as may happen when viewing images linked to records). This function is also available under the **File** menu.
Chapter 6. The OLIVIA Database

6.1 Table Relationships

Figure 29 below shows the relationships between the tables in the OLIVIA database. Table names set in **bold** are the tables that store data for each of the main record types in OLIVIA. Table names set in *italics* indicate tables that link two of the main record types. Arrows indicate the direction of the relationship. For tables that are related by a specific field, the field is indicated in a **fixed-width font**. In some cases, table names have been repeated to simplify the graphical representation; such repetitions are indicated by enclosing the duplicated table name in parentheses.

Figure 29. Table Relationships diagram
6.2 OLIVIA Tables

<table>
<thead>
<tr>
<th>Groups</th>
<th>Sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groups_AlternateTitles</td>
<td>Sites_AlternateNames</td>
</tr>
<tr>
<td>Groups_WorkTypes</td>
<td>Sites_IndexTerm</td>
</tr>
<tr>
<td>Groups_MaterialsTechniques</td>
<td>Sites_StylePeriod</td>
</tr>
<tr>
<td>Groups_StylePeriod</td>
<td>Sites_LocalInformation</td>
</tr>
<tr>
<td>Groups_LocalInformation</td>
<td>Sites_MaterialsTechniques</td>
</tr>
<tr>
<td>Groups_RelatedWorks</td>
<td></td>
</tr>
<tr>
<td>Groups_RelatedInformation</td>
<td></td>
</tr>
<tr>
<td>Groups_Culture</td>
<td></td>
</tr>
<tr>
<td>Groups_Index_term</td>
<td></td>
</tr>
<tr>
<td>Groups_Notes</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Surrogates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surr_index_term</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Works</th>
<th>ImageSources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Works_AlternateTitles</td>
<td>(Linking Tables)</td>
</tr>
<tr>
<td>Works_WorkTypes</td>
<td></td>
</tr>
<tr>
<td>Works_MaterialsTechniques</td>
<td></td>
</tr>
<tr>
<td>Works_StylePeriod</td>
<td></td>
</tr>
<tr>
<td>Works_LocalInformation</td>
<td></td>
</tr>
<tr>
<td>Works_RelatedWorks</td>
<td></td>
</tr>
<tr>
<td>Works_RelatedInformation</td>
<td></td>
</tr>
<tr>
<td>Work_Culture</td>
<td></td>
</tr>
<tr>
<td>Works_Index_term</td>
<td></td>
</tr>
<tr>
<td>Works_Notes</td>
<td></td>
</tr>
</tbody>
</table>

6.3 OLIVIA and Other Record Formats

Note: This section is incomplete for version 1.2 of OLIVIA.

MARC Records

OLIVIA is not a flat-file format (i.e., the hierarchical relations and relational database records don’t map nicely to a MARC record), but certain fields in OLIVIA correspond to MARC fields, as seen in the table below.

<table>
<thead>
<tr>
<th>MARC Field</th>
<th>Table</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>242</td>
<td>Works_AlternateTitle</td>
<td>AlternateTitle</td>
</tr>
<tr>
<td>245</td>
<td>Sites</td>
<td>Name</td>
</tr>
<tr>
<td></td>
<td>Works</td>
<td>Title_ObjectName</td>
</tr>
<tr>
<td>245p</td>
<td>Surrogates</td>
<td>ImageDescription</td>
</tr>
<tr>
<td>246</td>
<td>Works_AlternateTitle</td>
<td>AlternateTitle</td>
</tr>
<tr>
<td>246 Si or 2nd indicator</td>
<td>Works_AlternateTitle</td>
<td>TitleType</td>
</tr>
<tr>
<td>247</td>
<td>Works_AlternateTitle</td>
<td>AlternateTitle</td>
</tr>
<tr>
<td>Code</td>
<td>Fields</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>------------------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>260c</td>
<td>Sites StartDate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sites EndDate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Works Start_date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Works End_date</td>
<td></td>
</tr>
<tr>
<td>340</td>
<td>Works Description</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Works Dimensions</td>
<td></td>
</tr>
<tr>
<td>505</td>
<td>Surrogates ImageDescription</td>
<td></td>
</tr>
<tr>
<td>520</td>
<td>Surrogates ImageDescription</td>
<td></td>
</tr>
<tr>
<td>533a</td>
<td>Surrogates Surrogate_type</td>
<td></td>
</tr>
<tr>
<td>533n</td>
<td>Surrogates AccessionNumber</td>
<td></td>
</tr>
<tr>
<td>53?</td>
<td>Surrogates ImageDate</td>
<td></td>
</tr>
<tr>
<td>541</td>
<td>Site_LocalInformation Source_ID</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Surrogates ImageSource_ID</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Works_LocalInformation Source_ID</td>
<td></td>
</tr>
<tr>
<td>561</td>
<td>Works Provenance</td>
<td></td>
</tr>
<tr>
<td>654</td>
<td>Sites BuildingType</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Works_WorkType Worktype</td>
<td></td>
</tr>
<tr>
<td>655</td>
<td>Sites BuildingType</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Works_WorkType Worktype</td>
<td></td>
</tr>
<tr>
<td>655y</td>
<td>Site_StylePeriod StylePeriod</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sites Period</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sites Style</td>
<td></td>
</tr>
<tr>
<td>690</td>
<td>Works Icon_note</td>
<td></td>
</tr>
<tr>
<td>6XXy</td>
<td>Works_StylePeriod StylePeriod</td>
<td></td>
</tr>
</tbody>
</table>

Creator = 1XX, 7XX
Start date/End date = 008/7-10, 008/11-14, 260 $c
Dimensions = 340 $b
Materials/techniques = 340 $c/$d
Support = 340 $e
General notes = 500
Description = 520
Repository = 852 $a
6.4 Exporting OLIVIA Records to VIA

The Visual Information Access (VIA) system is a web-accessible union catalog of visual resources at Harvard and Radcliffe. It can be found at: http://via.harvard.edu:748/html/VIA.html. Records from OLIVIA are exported to the VIA system in batches. When you select the checkbox labeled VIA on a screen, the current record is marked for export to VIA. When the VIA update process is run, all records marked for export from OLIVIA are exported to VIA.

Only certain users (those in the Administrator or Cataloger 1 groups) may check and uncheck the VIA checkbox. See Section 7.2 for more information on user groups and permissions.

For a list of which OLIVIA data fields populate which VIA fields, see the OLIVIA-to-VIA map, Appendix B.

6.5 Deleting OLIVIA Records from VIA

To delete a record from VIA (which had previously been exported from OLIVIA), simply access the record in OLIVIA and deselect the checkbox labeled VIA. This marks the record for deletion from VIA. When the VIA update process is run, all records marked for deletion are deleted from VIA.

**Note:** Deselecting the VIA checkbox does not cause the record to be deleted from OLIVIA.

6.6 Minimum Record Requirements

The following table lists the minimum data necessary to save a record while maintaining the integrity of the database.

**Note:** These requirements do not assume that records with valid, meaningful cataloging data will be created by populating the listed fields. Please consult your individual repository’s cataloging guidelines for that information.

<table>
<thead>
<tr>
<th>Table</th>
<th>Field(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Works</td>
<td>Work Title</td>
</tr>
<tr>
<td>Groups_LocalInformation</td>
<td></td>
</tr>
<tr>
<td>Works_LocalInformation</td>
<td></td>
</tr>
<tr>
<td>Sites_LocalInformation</td>
<td></td>
</tr>
<tr>
<td>Sites</td>
<td>Site Name</td>
</tr>
<tr>
<td>Surrogates</td>
<td>Accession Number</td>
</tr>
<tr>
<td>Groups</td>
<td>Group Title</td>
</tr>
<tr>
<td>NameAuthorities</td>
<td>Sort Name</td>
</tr>
<tr>
<td>ImageSources</td>
<td>Source Name/Title OR Author</td>
</tr>
<tr>
<td>Groups_MaterialsTechniques</td>
<td></td>
</tr>
<tr>
<td>Works_MaterialsTechniques</td>
<td></td>
</tr>
<tr>
<td>Sites_MaterialsTechniques</td>
<td></td>
</tr>
<tr>
<td>Materials/Techniques</td>
<td></td>
</tr>
</tbody>
</table>
Chapter 7. Installing OLIVIA

7.1 Client Installation Procedure

You may call the OLIVIA Help Desk to arrange to have someone install the 4D client on your machine. If you wish to perform the installation yourself, follow the instructions below. Note that you may have to make arrangements with your IT department in order to install software on your machine.

Installation on Windows 95™ or Windows NT™ machines

To install the 4D client on a Windows 95™ or Windows NT™ machine:

1. Contact the OLIVIA Help Desk for the location of the client installation package. FTP the client package (a folder called “4D_Client_PC_x” where x represents the version number of the client) onto the machine that will receive the installation. The package contains all the other files and folders mentioned below in the installation instructions.

2. If QuickTime 4.0™ or higher is not already on the system, run the QuickTime install program and do a standard installation.

3. Copy or move the contents of the folder titled “Put in system directory” to C:\WINDOWS (on Windows 95 systems) or C:\WINNT40 (on Windows NT systems).

4. Copy or move the contents of the folder titled “Put at top level of hard disk” to C:\.

5. The client program should be located in the ACI folder that was just copied to the top level of the hard disk. Create a shortcut on the desktop pointing to the client program executable file. Name the shortcut “OLIVIA.”

6. Delete the downloaded installation package.

7. Start OLIVIA by double-clicking on the shortcut. You will be prompted to connect to a local 4D server [Figure 30]. Click the Other… button.

Figure 30. Local Server Connection dialog

8. Use the dialog that appears [Figure 31] to specify what kind of network module will be used to access a networked 4D (OLIVIA) server. Highlight the TCP/IP Module option and click OK.
9. You now have the option of defining a networked OLIVIA server, as described in Section 7.2.

**Installation on Macintosh machines**

To install the 4D client on a Macintosh machine:

1. Contact the OLIVIA Help Desk for the location of the client installation package. FTP the client package (a folder called “4D_Client_Mac_x” where x is the version number of the client) onto the machine that will receive the installation. The package contains all the other files and folders mentioned below in the installation instructions.

2. If QuickTime 4.0 or higher is not already on the system, run the QuickTime install program and do a standard installation.

3. There is only one other file in the folder. This is the client program. It may need to be uncompressed. Place the uncompressed file in an appropriate place on the Mac (perhaps a folder titled "OLIVIA Client x" where x is the version number of the client).

4. Create an alias on the desktop pointing to the client program executable file. Name the shortcut “OLIVIA.”

5. Delete the downloaded installation package.

6. Start OLIVIA by double-clicking on the alias. You will be prompted to connect to a local 4D server (Figure 32). Note that this window is as seen on the PC, but the one for Macs should be very similar). Click on the Other… button.

**Figure 31. Select Network Component dialog**

**Figure 32. Local Server Connection dialog**
7. Use the dialog that appears (Figure 33) to specify what kind of network module will be used to access a networked 4D (OLIVIA) server. Highlight the TCP/IP Module option and click OK.

Figure 33. Select Network Component dialog

8. You now have the option of defining a networked OLIVIA server, as described in Section 7.2.

7.2 System Setup

Defining OLIVIA Servers

In order to run OLIVIA, you must first define the locations of one or more OLIVIA servers which the OLIVIA client will connect to. To define an OLIVIA server, first double-click the OLIVIA icon on the desktop or choose it from the Start menu (Windows) or Apple menu (Macintosh), or launch the client program directly from the directory in which it was installed.

1. When the TCP/IP Server Connection dialog (Figure 34) appears, click the More Choices button (Windows) or the toggle flag in the upper right (Macintosh).

2. Type the hostname of an OLIVIA server into the Address box, and type a name for that server into the Name box. Press New to add the definition to the list of servers.

Note: The name of the server can be whatever descriptive name you like, but
the hostname typed into the Address box must be a valid hostname for a machine running the OLIVIA 4D server. The hostname for the OLIVIA production machine is olivia-prod.harvard.edu. The hostname for the Beta system is inviatest.harvard.edu.

3. Continue adding servers until you have finished, then click Cancel to exit the dialog or OK to connect to a highlighted OLIVIA server. There will be a brief wait while local files are created on your machine for each server version.

**Creating and Maintaining User Accounts**

Each user needs an account in order to access OLIVIA. User accounts are created and maintained by the HUL Office for Information Systems. To obtain an OLIVIA account, contact that office.

Each user account provides a username and password to access OLIVIA. The account will also be assigned to a group, which will define the level of access to the system that the user has.

<table>
<thead>
<tr>
<th>User Group</th>
<th>Access Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>2, 3, 4, 5, 6, 7, 8, 9, 10</td>
</tr>
<tr>
<td>Cataloger 1</td>
<td>2, 4, 8</td>
</tr>
<tr>
<td>Cataloger 2</td>
<td>2</td>
</tr>
<tr>
<td>View-only</td>
<td>1</td>
</tr>
</tbody>
</table>

Access levels are defined as follows:

<table>
<thead>
<tr>
<th>Level</th>
<th>Permissions Granted</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>View Only – only allows users to view information but not update it</td>
</tr>
<tr>
<td>2.</td>
<td>Create/Modify – allows users to add/modify Group, Work, Surrogate, Site, Name and Image Source records. These users will be able to create and delete linking records between these tables.</td>
</tr>
<tr>
<td>3.</td>
<td>Delete – allows users to delete Group, Work, Surrogate, Site, Name, Image Source, and linked Image Records</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>4.</td>
<td>Create/Modify linked Image records</td>
</tr>
<tr>
<td>5.</td>
<td>Global search/Replace/Insert/Delete – allows users to apply these functions to groups of records.</td>
</tr>
<tr>
<td>6.</td>
<td>VIA Export</td>
</tr>
<tr>
<td>7.</td>
<td>Image Linking in Batch Mode</td>
</tr>
<tr>
<td>8.</td>
<td>Mark Records for VIA export (check/uncheck VIA checkbox)</td>
</tr>
<tr>
<td>9.</td>
<td>Vocabulary Control</td>
</tr>
<tr>
<td>10.</td>
<td>Accession Number Changes (Surrogate records only)</td>
</tr>
</tbody>
</table>
Appendix A. Version 1.2 Release Notes

OLIVIA screens are sized to display properly when maximized on a monitor with 800x600 resolution. Monitors set to higher resolutions will work fine as well, but monitors set to VGA (640x480) resolution may have problems.

The system does not prohibit entering both corporate and individual names in a single Name record – the Corporate / Individual radio buttons control which name is the authority for that record. Corporate records display the institution name; Individual records display the concatenated personal name.

The [Page Up] and [Page Down] keys do not work in scrollable lists; you must use the mouse to scroll through the list.

Repository restrictions have not been implemented. Users can currently access (and modify) all records, and so should take particular care to modify only those records belonging to their repository.

The Help menu does not provide help for OLIVIA, only the 4D client program.
Appendix B. OLIVIA-to-VIA Data Map

The OLIVIA-to-VIA Data Map indicates which fields in OLIVIA are used to populate fields in VIA. This document is available as a PDF file from http://hul.harvard.edu/ldi/html/olivia_documentation.html.
Appendix C. Quick Report Editor

**Note:** The documentation for the Quick Report Editor was taken from Chapter 8 of the 4th Dimension User Reference. It is available as a PDF file from http://hul.harvard.edu/ldi/html/olivia_documentation.html.
Appendix D. LDI Digital Imaging Projects Workflow

The LDI Digital Imaging Projects Workflow document outlines the general procedures to be followed by a repository engaged in scanning material. Because this document is more volatile than the OLIVIA User Guide, it is available as a PDF file from http://hul.harvard.edu/ldi/html/olivia_documentation.html.
Appendix E. OLIVIA Data Dictionary

The OLIVIA Data Dictionary describes the tables and fields used in the OLIVIA database. Because this document is more volatile than the OLIVIA User Guide, it is available as a PDF file from http://hul.harvard.edu/ldi/html/olivia_documentation.html.
Appendix F. Keystroke Equivalents

A number of keystroke equivalents are in the process of being added to the OLIVIA system. They will all be listed here.

Note: CTRL and ALT are used on PCs. Their equivalents on the Mac are the COMMAND and OPTION keys.

Navigation area on detail forms:

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]
The above are easier to remember if you recall that the return screen is (usually) a vertical list of records.

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

Add repeatable field (+ button)  CTRL/COMMAND R

Cancel             CTRL/COMMAND .
Accept             ENTER