

Release

4.1

Luna Imaging Inc.

in*scribe*[™]

InScribe Configuration Manual

Luna Imaging Inc.

inscribe[™]

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Preface

The audience for this document is an administrator responsible with configuring InScribe from an existing Insight collection. The document intends to go through the process by using a sample collection to provide context to the configuration that is required. It is key to note that each collection represented within Inscribe will vary depending upon your collections schema.

This document is organized into three chapters and one appendix: Chapter One – Getting Started, Chapter Two – Configuring InScribe, Chapter Three – InScribe Workflow Scenarios, and Appendix A – Relationship Between Work Records and Reproduction Records

Chapter One provides a sample configuration process by using a sample collection to provide context to the configuration.

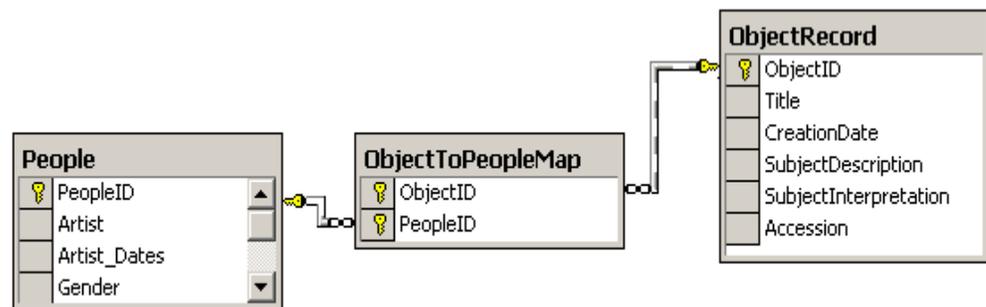
Chapter Two introduces InScribe and provides configuration details and settings.

Chapter Three provides InScribe workflow scenarios and gives general workflow guidelines for you to follow when you are working with either an existing collection or no existing collection contents, migrating to Insight.

Appendix A shows examples of the relationships between work records and reproduction records.

Getting Started

In order to understand InScribe, you need to understand the logic and reasoning for its design. InScribe was designed to work within a relational database structure, allowing the user to organize content into logical categories. This concept is best described using two types of records: an Object record (information about an art object) and an Artist record (information about the artist). See below.



By separating the Artist record from the Object you will be able to assign the same Artist information to many Object records without creating redundant data. This will maintain accuracy of information throughout the data content. For example, if I have an artist and discover that the nationality of that artist is incorrect, I would only need to edit the artist record once and all objects that have reference to that artist would all be updated. This type of structure allows you to do some useful tasks, such as creating and using multi-value lists, controlled vocabularies, and external references such as AAT or TGN.

Before building your Inscribe database, it is important that you think through how you would like to organize your information. What types of information should be logically blocked together, how you want to control data entry, should there be controlled vocabularies and where. There are many items to consider when identifying how to organize your information. Take your time, and draw out some models. The time you invest in planning your data layout will be well worth the investment.

Another concept is the ability to edit records on their own or combine records together (to edit a master record). Using the example of the Artist and Object Record, you need to have the ability to associate one record with another. An Object record needs the association of the Artist record to be complete. When cataloging a work of art, you will need to add one or more artists that relate to that work of art. This may sound obvious but the ability to build composite records has many strengths. In order to create these composites records in Inscribe you will need to create a **Record Relationship**.

Below is an example of a composite record. The Artist has been related to the Object record.

Data Editor - Object

Search View Selection View **Editor View** Table View Record Preferences

Record 1 of 2

Artist: WILKIE, Sir David

Artist Dates: 1785 - 1841

Nationality: Scottish

Title: Woman at Prayer

Creation Date: 19th century

Medium: Etching

Category: Painting/Watercolor

Style:

Object Type:

Measurement Dimension: *

Measurement Value: *

Measurement Metric: *

Subject Description: Chairs; Domesticinteriors?; Gates?; Praying

Subject Interpretation:

Accession: * 55.021

Credit Line: Bequest of William P. Chapman, Jr., Class of 1895

* Indicates a required field

Media 1 of 1  Media ID: 110026

new delete save restore

Next is an example of the Artist record alone.

Data Editor - Artist

Search View Selection View **Editor View** Table View Record Preferences

Record 2 of 60

Artist: ABBOTT, Berenice

Artist Dates: 1891-1993

Nationality: American

Gender: Female

Media 1 of 1  Media ID: 330009

new delete save restore

Important:

The following section describes three very important concepts in setting up the InScribe.

InScribe has three methods to combine records into a composite record. They are Independent, Dependent, and Vocabulary (see Figure 1).

- **Independent Records –**
 - Self contained
 - May contain multiple fields
 - May have relationships other independent records
 - May include dependent records and use vocabularies
 - An example of an Independent Record is the Artist record. It is a self-contained set of contents. (i.e. Artist Name, Birth place, Birth Date, Death Date, Nationality). An Independent Record can be referenced by other Records but not changed.
- **Dependent Records –**
 - Directly incorporated into Independent Records
 - Allows for multiple values
 - An example of a Dependent Record is the Measurement record. This Record type is directly tied to the Object Record
 - These cannot be edited outside the parent record.
- **Vocabulary Records –**
 - Single field Independent records
 - Used for controlled vocabularies
 - These types of records act as a controlled Vocabularies using a single field. They are similar to Independent records but only contain a single field and will display differently in the Inscribe editor.

Other items to consider before configuring InScribe are Source Data Tables and Inverted Indexes.

Source Data Tables

InScribe stores data in two ways: Inverted Indexes and the source data tables. The source data tables are relational database tables that store information about objects you cataloged. This information can be used for other purposes outside of Insight and InScribe. This is your archive of descriptive data. InScribe writes back to these source tables as you edit the data.

Inverted Indexes

The Insight and InScribe tools use and store data in what we refer to as Inverted Indexes. This allows us to support many relational structures without having to customize our application for each new structure. These indexes enable us to easily search, manipulate, and control the display of contents.

A sample collection is provided to give context to the configuration. It is key to note that each collection represented within InScribe will vary depending upon the field set of the particular collection. (If you need a copy of this database please contact the support@luna-img.com)

The model below is the relational diagram of the sample collection that is used in this manual.

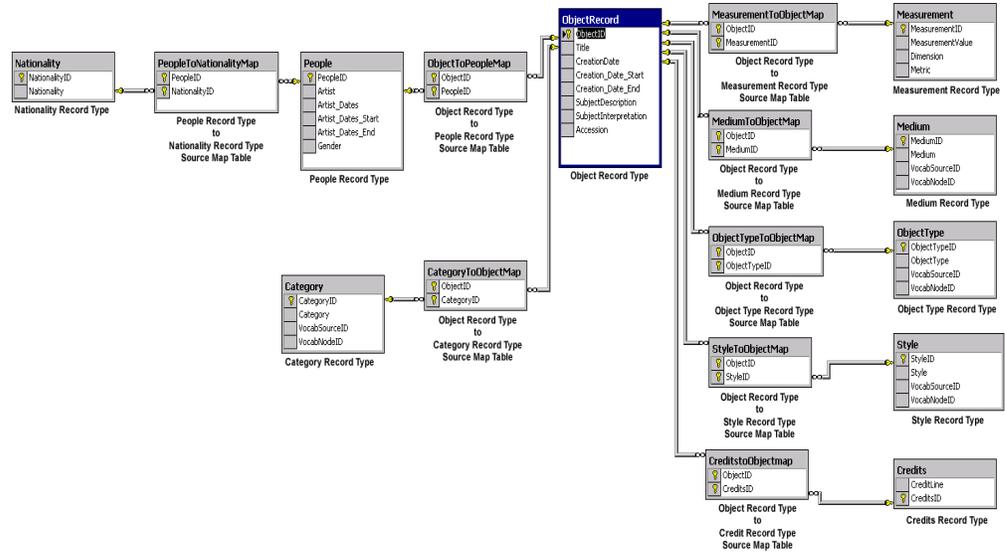


Figure 1 - Relational Diagram of Sample Collection

In the sample collection, the descriptive fields are conceptually grouped: Object, Artist, Material, and so forth. In this case, the Object record is the primary record type and each of the related concepts provide support for the authorities and repeating values. The intermediate cross-reference tables support the many-to-many relationships between the objects and the related records.

Record Types

A record type is a conceptual grouping of fields. Record types allow you to define the data that will be represented in InScribe. They describe the descriptive data schema for your collection. If your descriptive data is stored in a flat object model, where all the fields are in a single table, you will only need to configure one record type. As the complexity of your data schema increases, multiple record types may be needed. Depending on the complexity of the data schema, a record type may be a simple flat table or a complex relational model.

Technical Support

For **Technical Assistance:**

Luna Help Desk 1-800-452-LUNA (5862) – ext. 268
Email: support@luna-img.com

Phone Support Hours: Monday – Friday
9am – 5:30pm Pacific Standard Time

Configuring InScribe

InScribe is a data editor that enables users to create, edit, and delete catalog information over the Internet. It supports a wide range of cataloging requirements from simple data input forms to data entry and editing for many interrelated records (objects, media, groupings, vocabulary and so forth) with complex interrelationships. InScribe also provides the ability to handle cataloging from digital reproductions and for linking text information with media content.

InScribe will be ready to configure once you have installed the InSight 4.1 Collection Manager and Administrator Tools 4.1. For detailed installation instructions for these products, refer to your *InSight Installation and Configuration Guide, Release 4.1*.

Install Administrator Tools

The installer for InSight Administrator Tools is located on the CD for InSight Standard:

For Windows: `\admin_tools\windows\installAdministrator.exe`

For Solaris: `\admin_tools\solaris\installAdministrator.bin`

For OSX: `\admin_tools\macosx\installAdministrator.zip`

Install the Administrator Tools by starting the appropriate installation package, and follow the instructions issued by the installer.

InScribe Settings

In order to configure InScribe to work with your collection, you must first define and add the logical groupings of contents for your users (your data model for your collection) in the *InScribe Settings* in *InSight Admin Tools*.

You can start by defining the Record Types, such as Object Record, Artist, Nationality, Medium, and so forth, and group the similar ones together. For example, under Artist, you may group Artist Name, Artist Dates, Gender, and Nationality. The primary record type in the sample collection is the Object Record. The Object Record is represented by its record fields (such as Title) and related record fields (such as Medium). Each record type has a primary record table in a relational database and an intermediate mapping table is used to define the relationships between the related record types. For example, in the sample collection, the Object Record is the primary record type to which each of the related record types (such as Medium) are mapped to.

Next, you will define fields for specific records and map a specific field to a record type. (Under Inscribe Settings, you will use the Record Fields panel to assign fields to their parent Record Types and define functional characteristics.) Then, you will define the relationships between Record Types and define the source tables and joins used for updating the relational database.

Items that can be configured in the Administrator Tools are:

- Define Record Types.
- Define Record Type Fields
- Define the relationship between Record Types.
- Define the Record Type Joins.
- Define restriction and approval levels.
- Define and configure hierarchies
- Define Thesaurus Relation Types.
- Define User Profiles and editing permissions.
- Associate published thesauri or vocabulary with a field.
- Define a Record Type as a dependent record.
- Associate a profile with a User Group.
- Configure the User Server Database to be InScribe aware.
- Configure the InScribe Client to access additional User Managers.

To change the configuration or settings for InScribe, you need to access *InScribe Settings* from your collection manager instance in the navigation tree under *Collection Manager*, from the Insight Administration console. In this sample, the name of the Collection Manger is *Inscribe v4.1*.



Figure 2 - Accessing InScribe Settings

Configurations affect what a user can see and access within InScribe. There are two categories of configurations: 1) general structure configurations and 2) permissions based configurations to dictate access and commit change privileges.

It is important that you, as an administrator, understand your data and how you would like to represent it within InScribe. First, start with the source data and breakout the logical groupings of concepts. In the sample collection, the conceptual groupings are: Object, Measurement, Medium, Object Type, Style, Category, People, and Nationality.

Record Types

IMPORTANT NOTE: Before you continue make sure you have read the [Getting Started in Chapter 1](#)

As described above, the first step in the Inscribe configuration process is defining Record Types and their behaviors. Record Types may be represented in one of three ways; Independent, Dependent, or Vocabulary. The record type behaviors were developed to suit the various ways users work with descriptive data. Independent Record Types are independent constructs and presume no dependencies on any other records. They may be high-level concepts like works of art, or an Artist Record. Records may be incorporated into other records, or records may borrow selected fields to serve as reference fields in the context of a related record.

Multi-Value Fields (Independent Records)

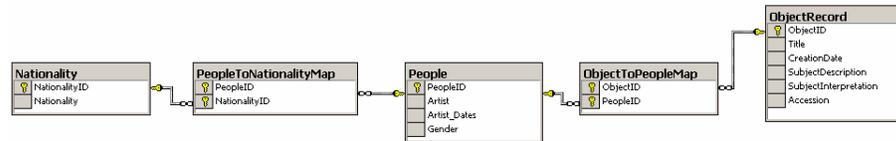


Figure 3 - Independent Records

Independent Records do not require an association with the primary table (Object Record) in order to be edited. In this example, the people table is what the record will be based on. The people table also has the nationality table attached to it as a Controlled Vocabulary. You also see an association to the Object Record, this relationship is to create the *Record Relationship*.

To create this type of record, perform steps 1-4 from the Dependent Records example and continue with the following steps. Under InScribe Settings:

1. Create the Record Type
 - a. Refer to the *Record Type* section in the InScribe Configuration Manual.
 - b. Assign a Record Type Name
 - c. Assign a Display Name

- d. Select the Table
 - e. Select the Record ID
 - f. Do Not Check *Is Dependent* or *Is Vocabulary*
2. Create Record Fields
- a. Refer to the *Record Fields* section in the InScribe Configuration Manual
 - b. Select the Record Type
 - c. Select the Field
 - d. Select the Field Table
 - e. Select the field column name
 - f. Select Value List Allowed
 - g. Repeat for each field in the table
3. Create Record Relationships
- a. Refer to the *Record Relationships* section in the *InScribe Configuration Manual*
 - b. Select destination *Record Type* of where you would like to show these fields.
 - c. Select the source *Related Record Type* of where the data originates.
 - d. Select the *Join* that ties the record types together.
 - e. Select the *Source Table Map* that is the relation table that ties the two tables together.

For the following two examples (Multi-value field & Controlled Vocabularies) refer to the diagram below.

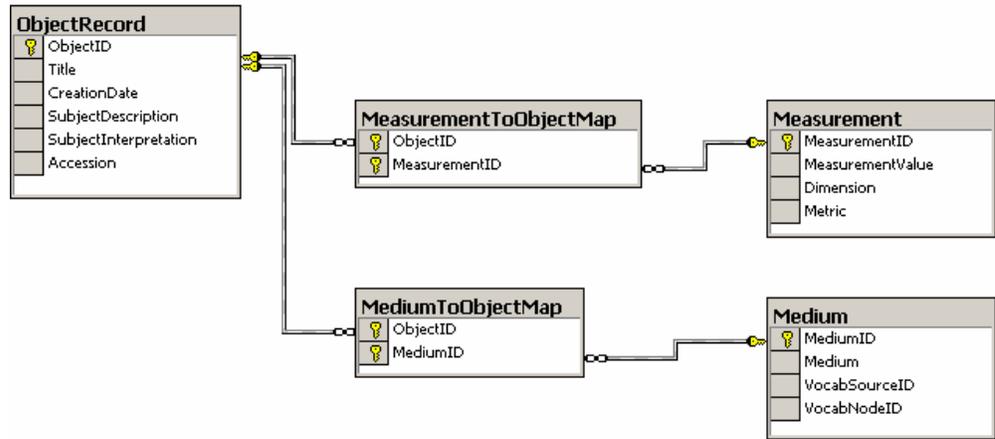


Figure 4 - Dependent Records and Controlled Vocabularies

Multi-Value Fields (Dependent Records)

In order to store multi-values in an InScribe database, you will need to form a simple relational data model. Look at the sample collection and focus on three tables:

ObjectRecord

MeasurementToObjectMap

Measurement

Every *Object Record* field can only have one value: a title, a creation date, a subject description, a subject interpretation and one accession.

When it comes to Measurement, we would like to have the ability to identify multiple Measurements. For example, you may need to identify an item using the height, width and depth. This is where we add the relational quality.

InScribe requires you to form a relationship in the following manner. The main table must have a unique numbered field. In our example this is *ObjectRecord.ObjectID*. The *ObjectRecord.ObjectID* field must be associated through a many-to-many relation table that uses numbers to identify the association. In this case, the table is MeasurementToObjectMap. The other side of this association is with a table called Measurement using the field MeasurementID.

With this structure, you are able to associate more than one Measurement with a single object record. Once the relational structure is created, you will need to do the following in the Insight Administrator Tools to make it work in InScribe.

1. Add the Table
Refer to the *Create a Table* section in the *Administrator Tools User Guide*.
2. Create the InScribe Join
Refer to the *Managing InScribe Joins* section in the *InScribe Configuration Manual*.
3. Add the field Group
Refer to the *Adding a new Field Group* section in the *Administrator Tools User Guide*.
4. Add the field
Refer to the *Adding a new Field* section in the *Administrator Tools User Guide*.
5. Under Inscribe Settings
 - a. Create the Record Type
 - i. Refer to the *Record Type* section in the *InScribe Configuration Manual*.
 - ii. Assign a Record Type Name
 - iii. Assign a Display Name
 - iv. Select the Table
 - v. Select the Record ID
 - vi. Choose *Is Dependent*

- b. Create Record Fields
 - i. Refer to the *Record Fields* section in the *InScribe Configuration Manual*
 - ii. Select the Record Type
 - iii. Select the Field
 - iv. Select the Field Table
 - v. Select the field column name
 - vi. Select Value List Allowed
 - vii. Repeat for each field in the table

- c. Create Record Relationships
 - i. Refer to the *Record Relationships* section in the *InScribe Configuration Manual*
 - ii. Select destination *Record Type* of where you would like to show these fields.
 - iii. Select the source *Related Record Type* of where the data originates.
 - iv. Select the *Join* that ties the record types together.
 - v. Select the *Source Table Map* that is the relation table that ties the two tables together.

Controlled Vocabularies

This is the same as in creating multi-value fields, except one change taking place in the Record Type. Instead of choosing *Is Dependent* you will need to choose *Is Vocabulary*. Another restriction is that the source only contains a single field.

By choosing *Is Vocabulary* you are forcing the user to choose the values from a select list. This select list can be edited by opening the Record under the file menu.

There are three examples of vocabularies being used in the sample database model: Medium, Object Type and Style (see the example below).

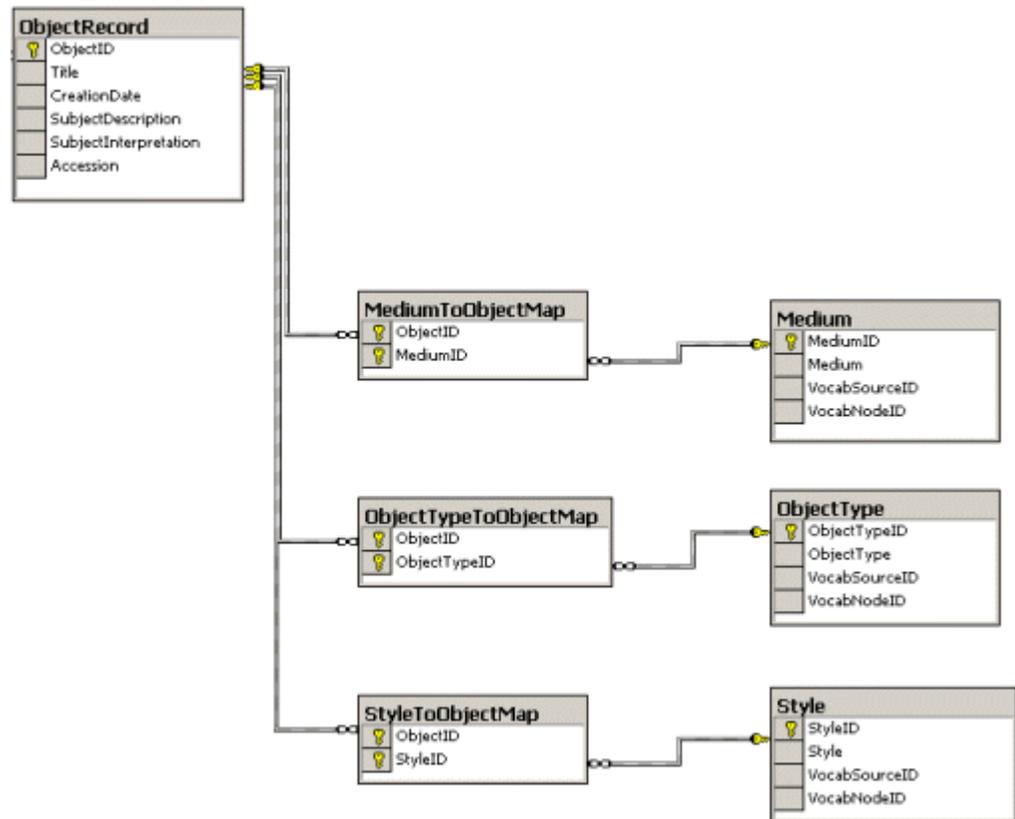


Figure 5 – Database Model Vocabulary Examples

CREATING/EDITING RECORD TYPES

You can create a new record by selecting your collection manager instance in Insight's navigation tree and right click on *Record Types New* under *InScribe Settings*.

You can edit an existing record type by your collection manager instance in Insight's navigation tree and right click on *Record Types New* (under *InScribe Settings*). To modify a record type, select or click on an existing record type (highlight it) and right click to select *Edit*. All the record descriptions are the same as for *Creating a New Field Record*. You are just editing an existing record. Follow the steps below to edit a record:

The screenshot shows a dialog box titled "Edit Record Type - Object". It contains the following fields and options:

- Record Type Name:** Object Record
- Display Name:** Object
- Record Table:** 1 - ObjectRecord
- Record ID Column Name:** ObjectID
- Restriction Level:** 0
- Is Vocabulary:**
- Is Dependent:**
- Enable Dupe Check:**
- Enable Ref Check:**
- Max. Record ID:** 10006
- Display Order:** 1
- Primary Insight Record Type:**

At the bottom of the dialog are two buttons: "Save" and "Cancel".

Figure 6 – Create/Edit a Record Type

1. *Record Type Name* – Provide a name for this record.
2. *Display Name* – Name to be viewed by an end user within Inscribe. Normally, you would want this to be the same as the record type name. If you wish to change a record type name after deployment, you will be able to modify the display name value with no impact on the descriptive data.

3. *Record Table* – This is the root table for all fields for a specific record type. The record table maps to ObjectRecord table. The Record Table defines the root table containing the native records for the record type. Each Record Type is required for the source data indexing and the commit to source data process. If you are defining a new record type, check to make sure your record table is in the pull-down list. If it is not, you need to create a table for this record by accessing *Collection Manager's Table* folder in Admin Tools (see instructions on how to create a table in *Chapter 4, Section 2* of your *Administrator Tools User Guide, Release 4.1*).
4. *Record ID Column Name* – This is the name of the primary key column located in the Record Table. The column contains the unique numeric identifiers used in tracking the relationships between record types and updating fields in the case of native record fields. In Figure 2, the field containing the primary key identifier is ObjectID.
5. *Restriction Level* – This is used to indicate the record types a user can access. The "Restriction Level" dictates the record type available for a user in the File / Open Record menu item in the Inscribe client. That is, the restriction level indicates the minimum approval level required for a user to access the corresponding record type. For example, setting the restriction level to 3 for the record type "Nationality", means that only users with an approval level greater than or equal to 3 will be able to open data editor windows for the "Nationality" record type.

The least restrictive privilege is 0 and the most restrictive is 6, with 6 being an administrator and 0 being a lower-class user. During the initial set-up, it is helpful to set the approval level to 0 until you know that the Record Types, Record Fields and Record Relationships have been defined properly.
6. *Is Vocabulary* – This is used to indicate that a record type should behave as a vocabulary. If this box is checked, InScribe displays a single field record and all values associated with that field's controlled vocabulary, whether mapped to an object or not. Vocabularies allow for the managing of a controlled external resource of terms. In the sample collection, Medium, Object Type, Style, Category, and Nationality are treated as vocabularies. In a sense, these are independent record types that are folded into the related record types to provide a controlled field resource in the context of primary record type (i.e. Object Record).

7. *Is Dependent* – Defines the record type as a dependent record. This is a toggle to turn dependent record on or off. If it is not checked, it behaves as an independent record type. If it is checked, then any changes made to the dependent record results in actual edits to the dependent record. Also, deleting a parent record means that all of its related records are deleted as well.

Dependent records are managed through the parent record. Dependent records are created, edited, and deleted through the editor window of the parent record. When a normal record is deleted, all of its related dependent records are deleted as well. Therefore, dependent records are not shared with other records and can only be related to the record through which they were created. Once the relationship of a record to its dependent record is severed, the dependent record is deleted.

In the sample, the Measurement record type is treated as a dependent. This allows for repeating field groupings that can be directly managed through the form for the primary record types within the Inscribe client interface.

8. *Enable Dup Check* – Toggle on to check if an identical record exists for the newly created record. This is to prevent duplicate references to identical data. It checks the combination of fields that belong to the record type and the values for each. This prevents duplicate records from being created. For vocabularies, if a user tries to add a secondary reference to a term that already exists, the user will be prompted that a record matching that criteria already exists.
9. *Enable Ref. Check* – Indicates if a user attempts to delete a record, a query is run to check if any related records are mapped to the current record. If related records do exist, the user is prompted with a message indicating such and whether they would like to delete the existing record. This function is useful when managing authorities, such as Artist or a vocabulary, to ensure that deleting a value will not effect the record-to-record mappings that already exist.
10. *Max. Record ID* – This is a record level identifier that identifies the specific record types within a table and acts as a primary key. It is used to generate the next unique ID for this record type. This value should only be modified prior to deployment. Thereafter, it is automatically set and maintained by the Inscribe backend. For data integrity purposes, it's important that this value only be changed when you, as the administrator, have ensured that the new id count will not conflict with existing records with the same record id.
11. *Display Order* – Indicates the order of the records as they appear in the Edit Record and any pull-downs, such as the record-to-media mapping window. This is quite helpful in laying out the record types that are most frequently used.
12. *Primary Insight Record Type* – Denotes the primary record type that will be used to map media for available use within Insight.

13. Click Save to save the record.
14. Select Cancel to void your transaction

Deleting a Record Type

During the Inscribe configuration process, you may delete a Record Type by right-clicking on the record and clicking the delete option. However, deleting a record type definition will delete all references to that Record Type in the Record Fields and Record Relationships sections of the Administrator Tools. **Important:** If Inscribe has been deployed, deleting a record type will cause all the value associations to the specified record type to be lost.

Record Fields

Each record type has associated data entry fields that map to fields in the underlying relational database. The Inscribe configurations for each field accentuate the existing definitions located in the *Collection Manager's Fields* section (see instructions on how to configure fields in *Chapter 4, Section 2* of your *Administrator Tools User Guide, Release 4.1*).

CREATING/EDITING A RECORD FIELD

You can create a new record field by selecting your collection manager instance in Insight's navigation tree and right click on *Record Fields New* under *InScribe Settings*. All the fields will be initially blank or default values will be presented.

You can edit an existing field record by selecting your collection manager instance in Insight's navigation tree and right click on *Record Fields* under *InScribe Settings*. To change a field, select or click on an existing record field (highlights the entire row) and right click to select *Edit*. All the field descriptions are the same as for creating a new record field. You are just editing an existing field. Follow the steps below to edit an existing field. Before you create a new field for a new record, make sure the new record has been created first (see *Creating/Editing A Record Type* in this chapter) and that it has been included in the data source by you or another administrator.

Before creating a record field, make sure the *Record Types* have been defined. If they are not in the pull-down lists, then they have not been created yet. To create a new record, see *Creating a New Record Type* in this chapter.

Next, in order to select a field, check to make sure you have defined your field in the *Collection Manager Fields* folder in Admin Tools. For more information, see *Chapter 4, Section 2, "Adding a New Field"* in the *Administrator Tools User Guide, Release 4.1*.

Next, in order to select a field table, check to make sure your field table is included in the *Field Table* pull-down list. If it is not, you need to create a table definition for this field by accessing *Collection Manager's Table* folder in Admin Tools (see instructions on how to create a table in *Chapter 4, Section 2* of your *Administrator Tools User Guide, Release 4.1*). You should not create a new field without putting it in a table

Once you have defined all of the above items, then proceed with the steps below to create a new field like the example below:

The screenshot shows a dialog box titled "Edit Record Field - Category". It contains the following fields and options:

- Record Type:** 9 - Category
- Field:** 10 - Category
- Field Table:** 2 - Category
- Field Column Name:** Category
- Join:** None
- Preferred Value Column Name:** (empty)
- Restriction Level:** 0
- Required:**
- Integer Range:** (empty)
- Value List Allowed:**
- Min Approval For Adding New List Values:** 0
- Repeating Values Allowed:**
- Display In Related Records:**
- Validate New Values:**
- Hierarchy Column Name:** VocabSourceID
- Hierarchy Node Column Name:** VocabNodeID

Buttons: Save, Cancel

Figure 7 – Creating / Editing a Record Field

1. *Record Type* – Select a record type. This denotes the Record Type display name from Record Types to which the specified field belongs.
2. *Field* – This is the field definition from the Fields folder that is to be extended for InScribe.
3. *Field Table* – Denotes the Table definition from Tables where the field values reside. Either select from the *Field Table* pull-down list or create the table in Admin Tools as stated above.
4. *Field Column Name* – This is the name of the column containing the field values.
5. *Join* – For version 3.5 - 4.1 this should always be set to None

NOTE: Join is for Indexing and storing data in the Insight Inverted Indexes only, If you set it to anything other than None your data will not be written to the source tables.

6. *Preferred Value Column Name* – The name of the column from the root record type table to use for setting preferred values (this column can be NULL).
7. *Restriction Level* – Indicates the minimum approval level required for a user to edit the field. A negative level indicates that there is no restriction.

A level assigned by you, the System Administrator, that defines the user's access or privilege to view and edit various records and fields. The most restrictive state is level 0 and the least restrictive is 6. For example, if the restriction level is set to zero, then everyone can access the record (this is the most controlled state). If it is set to 6, only administrators can access the records (least controlled state).

8. *Required* – Indicates that this field must be specified in order for the record to be saved. **Note:** The field is only required in the context of its parent record type. The restriction is not applied when the field is displayed in the context of a related record type.

Check the box to enable, if the field requires a value. InScribe pops up an error message if the field requires a value and you have not provided a value. The system default is that the field does not require a value (box is unchecked).

9. *Integer Range* – If the field is an integer field, indicates the range of acceptable integer values. Ranges are specified like "200:1200" or enter null/empty string if there is no range validation for the field. A colon is used as the delimiter of the two ends of the value range.

10. *Value List Allowed* – Indicates that a value list of existing values is available. Most of the time you will want to enable the value list option. A value list presents a list of distinct values that have been cataloged and associated with an existing record. A long description field or date field are cases where you may wish to disable the value list.

Check this box if you want InScribe to display all values entered so far for this particular field. You can only see this value list if this field has a value list or dependent record list attached to it, such as vocabularies, published hierarchical thesauri (for example, AAT, TGN), or non-published hierarchies.

11. *Min Approval for Adding New List Values* – Defines the minimum permission level required to add a new value to a field. This allows you to define a controlled value field. If the user has a permission level lower than the specified value, the user will only be able to select from the list of existing values. This option is helpful when using a flat source table model of Inscribe to employ controlled value lists. A value list presents a list of distinct values that have been cataloged and associated with an existing record.
12. *Repeating Values Allowed* – Dictates whether repeating values are allowed for the specified field. It is important to note, that only the first value can successfully be written back to the source data. Inscribe will record the repeating values in the inverted indices, but due to the constraints of the data schema, only one value can be written back to the source data.
13. *Display in Related Records* – Indicates whether the field should appear as a reference field when in the context of a related record. For example, when the Artist record is displayed in the Object Record form, the Artist Name, Artists Dates and Nationality can be viewed, but Gender is not displayed.
14. *Validate New Values* – Indicates whether or not Inscribe should check to see if an identical value already exists for that field before entering a secondary reference.
15. *Hierarchy Column Name* – Defines the field column in the source data table that is to store the hierarchy id reference (i.e. 1=AAT) when a value is inserted from a hierarchy.
16. *Hierarchy Node Column Name* – Defines the field column in the source data table that is to store the hierarchy node id reference when a value is inserted from a hierarchy. It stores the hierarchy node value for the appropriate term. This allows the administrator to track and disambiguate any identical terms and their node references.

DELETING A RECORD FIELD

During the Inscribe configuration process, you may delete a Record Field by right clicking on the record and clicking the delete option. However, deleting a record field definition will cause the value associations to the specified record field to be lost.

Record Relationships

To create composite record (A form that contains more than one record type) an association between the record types must be created. The following example is a composite for the record type Object. In this example People(Artist), Measurement, Category, Medium, Object Type, Style, Subject and Credit are associated with Object.

The screenshot shows the 'Data Editor - Object' window with the 'Editor View' tab selected. The interface displays a form for editing a record, with fields grouped into sections. The record is identified as 'Record 1 of 2'. The fields and their values are as follows:

Artist:	WILKIE, Sir David
Artist Dates:	1785 - 1841
Nationality:	Scottish
Title:	Woman at Prayer
Creation Date:	19th century
Medium:	Etching
Category:	Painting/Watercolor
Style:	
Object Type:	
Measurement Dimension: *	
Measurement Value: *	
Measurement Metric: *	
Subject Description:	Chairs; Domesticinteriors?; Gates?; Praying
Subject Interpretation:	
Accession: *	55.021
Credit Line:	Bequest of William P. Chapman, Jr., Class of 1895

At the bottom of the window, there is a media preview area showing 'Media 1 of 1' with a thumbnail image of a woman at prayer. Below the preview are buttons for 'new', 'delete', 'save', and 'restore'. A note indicates that an asterisk (*) denotes a required field.

Associated record fields are field groups that represent a relationship between two records. In the sample collection, the Object Record is made up of 1) its native field set, 2) and the fields from eight associated records: Artist, Category, Medium, Object Type, Style, Credits, and Measurement. The values that appear in the associated record fields are not literally entered into the active Object Record, but serve as

references to the associated record. Record Relationships define the direct relationships between two Record Types and then indirect relationships through parent-child mappings.

CREATING/EDITING A RECORD RELATIONSHIP

Before creating a record relationship, make sure the Record *Types* have been defined. Both Record Type and Related Record Type reference the values defined in the *Record Types* section. If they are not in the pull-down lists, then they have not been created yet. To create a new record, see *Creating a New Record Type* in this chapter.

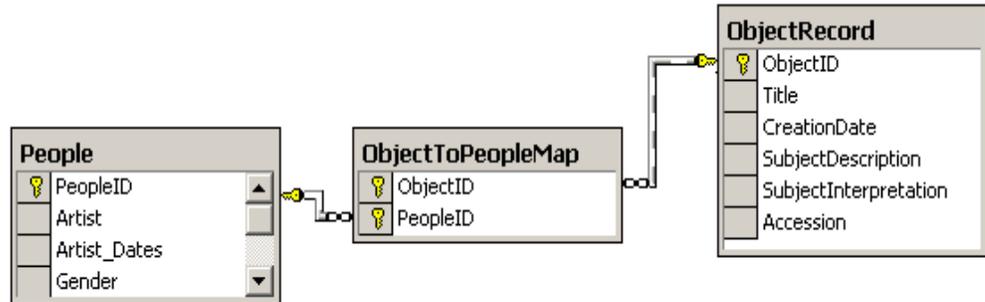
Next, in order to select a Join, make sure the join paths are included in the Join pull-down list. If they are not there, then they need to be added via the *Edit Joins / Manage Inscribe Joins* function in the *Collection Manager* in Admin Tools. For specific instructions, see *Managing Inscribe Join* section later in this chapter.

Last, check to make sure your source map tables are in the *Source Map Table* pull-down list. If they are not, create the table in *Collection Manager's Table* function in Admin Tools (see *Chapter 4, Section 2, "Create a Table"* in the *Administrator Tools User Guide, Release 4.1*).

Once you have defined all of the above items, you can proceed with the steps below:

You can create a record relationship by selecting your collection manager instance in Insight's navigation tree and right click on *Record Relationships New* under *InScribe Settings*. You will see the following window:

Figure 8 – Creating/Editing a Record Relationship



1. *Record Type* – Defines the preferred record type in an A to B relationship. The pull-down list provides the display name values for the defined Record Types.

In this case the Object record is the destination Record Type

2. *Related Record Type* – Defines the secondary record type in an A to B relationship. The pull-down list provides the display name values for the defined Record Types.

The example is associating Artist with the Object record

3. *Join* – Indicates the join, *Joins /Edit Inscribe Joins* to use to locate the mappings of record IDs to the related record IDs.

Choose the join that represents the Record Type you are creating the association to. In the example above, Object is the record type. Notice the Join above goes (ObjectRecord => ObjectToPeopleMap)

Edit joins only applies to a collection that has more than one table. A join maps each related table to a record types root record table.

4. *Source Map Table* – Identifies the intermediate cross-reference table in a join definition. The table is used when committing changes to the relational tables. This Source Map Table indicates the single mapping table that relates the two record types.

In the example above ObjectToPeopleMap is this association.

The source map table is what defines the relationship between the two record types. It maps two record types using an intermediary mapping table or cross reference to define relationships between two records and their related records.

In order to make the publishing of changes to the source/relational tables functional, the following constraints exist :

- (1) For record-to-record mapping - There must be a single source table that maps the records of one type to another. For example, if "Object Record" can

be related to "Artist" there is required to be only ONE table that maps "Object Records" to "Artist" records. This mapping table is the Source Map Table.

(2) For record field changes - Only the values of record fields that reside in the root record type table can be updated. That is, only record fields that do NOT have a join path specified in Record Fields can be updated in the source tables. This eliminates the need to locate a record field's source values through a potential maze of related tables. The root record type table is defined by the Record Table definition in Record Types.

Once the record types and relationships (including proper join specifications) have been defined, you can run the Inscribe Indexer.

DELETING A RECORD RELATIONSHIP

During the Inscribe configuration process, you may delete a record relationship by right clicking of the record and clicking the delete option. However, deleting a record relationship definition may cause the value associations to the specified record field to be lost.

Managing InScribe Joins

Right-click the Joins folder of the Insight Administrator Tools to access the *Manage Inscribe Joins* panel.

Joins define the relationships between Record Types through intermediate mapping tables. Creating Join definitions for Inscribe is similar to the method used in the Manage Insight Joins, except now you can have multiple root nodes.

The example below shows each of the Record Type tables are mapped through an intermediate mapping table that supports the many-to-many relationship that exists between the two record types. In the case of the Object Records relation to People (Artist record type), the relationships between the two independent record types are defined in the ObjectToPeopleMap table. The intermediate mapping tables are two column tables containing the primary keys from each of the related record types. In this case, the ObjectToPeopleMap table contains ObjectID and PeopleID.

When defining an Inscribe Join, start from the preferred record type and work outwards to the related record type. These definitions are key in the initial indexing and update source relational data processes used by inscribe to manage data integrity.

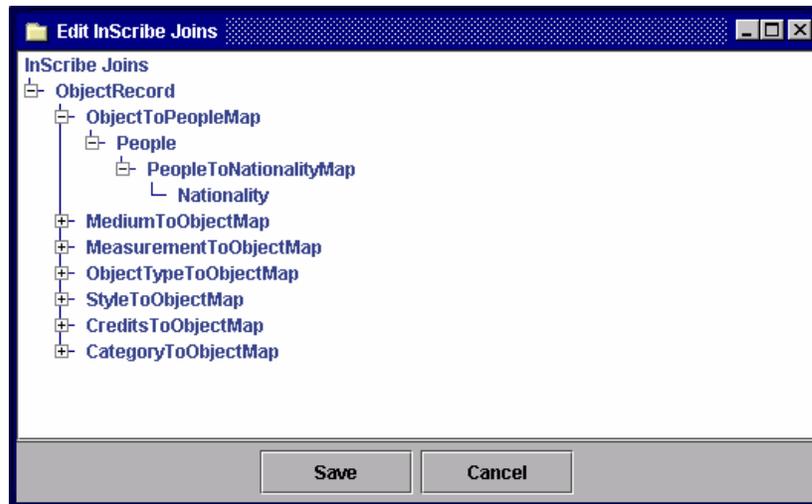


Figure 9 - Edit InScribe Joins

Inscribe Indexer

Once the Record Type, Record Fields, and Record Relationships sections have been defined, the next step is to change the Indexer Mode to be Inscribe compliant. Under *Collection Manager*, right click on *Invoke Indexer* and select *Set Indexer Mode*. If the *Inscribe/Insight Indexer* option is not already selected, select in and click *Save*. Next, right click on *Invoke Indexer* and select *Run*. The window should be titled: *Inscribe Indexer Setup*. To perform value and term indexing of your source data, select the Value and Term Indexing check boxes in the Record Indexing section. Next, click the *Start Indexing* button to begin the indexing process. Depending on the size of your collection, indexing may take anywhere from minutes to hours.

Profile Privileges

Privileges associated with a user account determine which collections, records, and fields are available to users. InScribe privileges affect the following areas:

- Based on the account, fields and their values may be *Read Only*.
- Record Type approval level settings enable you to restrict access and editing of corresponding records.
- Record Field approval level settings enable you to restrict access and editing of particular fields.
- Value List Control fields (each field) contain a minimum privilege level necessary to add a value not currently present in a value list.
- Account determines authority to review and approve/reject new cataloging, and to commit such entries to the source data and indices.

Note: The list of available records and editorial privileges will vary by account.

The *Inscribe Settings / Profile Privileges* folder extends the Profile properties defined in the Profiles section of the Administration Tools. If no records appear in the *Inscribe Settings / Profile Privileges* section, ensure that Insight profiles have been defined.

You can edit InScribe privileges by selecting collection manger instance in Insight's navigation tree and open the *Profile Privileges* directory. To change an InScribe privilege, select an existing ProfileID and right click to select *Edit*.

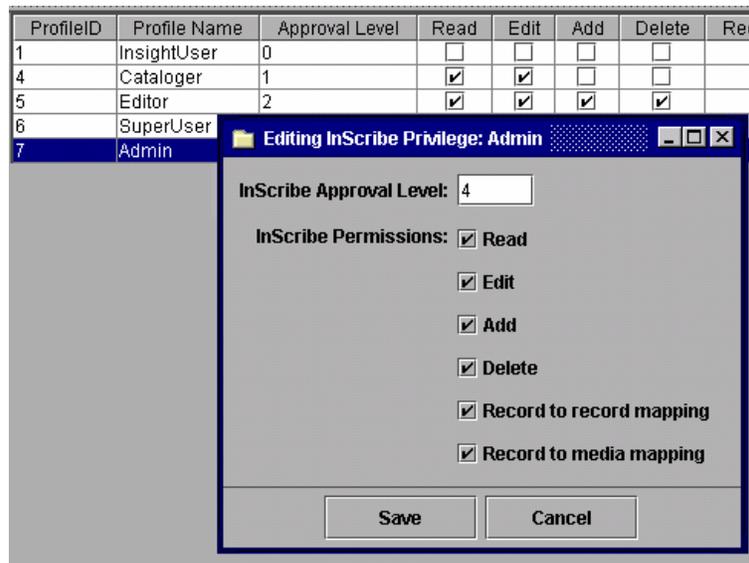


Figure 10 - Profile Privileges

1. *InScribe Approval Level* – The most restrictive privilege is 0 and the least restrictive is 6. A level six approval level is usually given to a system administrator or high-level cataloger.
2. *InScribe Permissions* – Permissions are given to be able to perform the following tasks (by checking the box):
 - Read, edit, add, or delete fields, records, and forms within InScribe.
 - Link record-to-record or record-to-media mapping.

PROFILE PRIVILEGE EXAMPLE

Profile	Approval Level	Read	Edit	Add	Delete	Record to Media Mapping
Admin	6	X	X	X	X	X
Editor	5	X	X	X	X	X
Cataloger	4	X	X	X	X	X
Data Entry	1	X		X		

Figure 11 - Example of Profile Privileges

In the above example, the Admin profile has full administrator privileges. That means that the user can read, edit, add, delete fields, records, and forms in InScribe as well as perform record-to-media linking.

With the Editor profile, a user has the same overall access, but only has access to update the Inscribe/Insight data tables and not the source relational data tables.

The cataloger has the same access privileges, but a user with a higher approval level must approve changes made by a cataloger before the values are committed to the Inscribe/Insight data tables or the source relational data tables.

The most restricted profile, Data Entry is only able to read and add records. A user with this profile is unable to edit or delete records created by other users and a user with a higher approval level must approve any new records created.

Permissions dictate a users access to record types (authority controls) and the ability to apply changes to the Inscribe/Insight data tables or the source relational data tables. See the Approval Levels section later in this chapter for additional information.

Permissions also restrict the access to and ability to add/edit/delete records and field values.

Approval Levels

Approval Levels enable privileges to be applied, so approval can be granted for data in the Inbox/Outbox to be published to Insight and the source data to be published to the relational database. The approval levels are set usually at a relatively high 5 or 6 level for administrators.

You can provide InScribe approval levels by selecting your collection manager instance in Insight's navigation tree and click on *Inscribe Settings / Approval Levels*. To change an approval level, select an existing approval level and right click to select *Edit*.

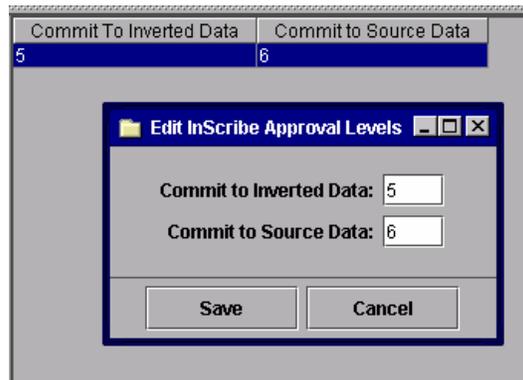


Figure 12 - InScribe Approval Levels

1. *Commit to Inverted Data* – This is live real-time data to be published by the user to InScribe and Insight. Users with a Profile Approval Level equal to or greater than the defined value are able to commit changes to the Inscribe/Insight inverted data tables and approve changes from lower level users within the Inbox. If the approval levels to commit to the inverted data and commit to source data differ, each of the changes approved by the first level still need to be approved by the administrator in order for the values to be written back to the source data tables.
2. *Commit to Source Data* – This is archived or batch data published by the user to the relational database or source data. User with this privilege is able to commit values to the inverted data and the source data.
3. *Restriction Levels* are 0-6. The most restrictive privilege is 0 and the least restrictive is 6. A level six approval level is usually given to a system administrator or high-level cataloger

InScribe Workflow Scenarios

Section 1: Working With and Without Existing Collections

This chapter has two sections. The first section provides two basic VRA scenarios and the second section provides guidelines for a general workflow. The first scenario will give you an overview of the InScribe workflow when you are working with an existing collection (consisting of images and data content) migrating to InSight VRA, and the second scenario provides information for you if you are using InScribe without an existing collection (no digital images and no data content).

Scenario #1 - Migrating to InSight VRA with a Collection

Scenario 1 provides guidelines for those with an existing collection migrating to InSight VRA.

DATA MIGRATION

Map existing data fields to InSight VRA data fields

1.1.1) Review data for appropriate field equivalents.

Review your existing data set and field structure for appropriate mapping to the InSight VRA field set. See InSight VRA Data Dictionary for comprehensive list of available fields in http://www.lunaimaging.com/Insight_Support/Appendix_B.xls

Mappings from broadly applied categories will be easily accommodated within the compendium of categories provided in the InSight VRA field set. For example, if your data set included categories such as Title, Artist, Date, and Nationality, the mapping may look something like this:

Title = Title

Artist = Creator

Date = Display Date

Nationality = Culture

Where “qualifiers” are applied, the InSight VRA model uses “Type” fields. These fields allow you to carry multiple category type descriptors as data values in rows, rather than limiting these to specific fields.

For example, if your data supports multiple Title types such as: Title.Translation or Title.Series, the distinction between the types is made by assigning the Title's descriptive value to the Title field, and the Title's qualifying value to the Title Type field. Thus, if your data includes categories such as Title and Series Title, by assigning the qualifying value as a data value to the InSight VRA Title Type field, the resulting data will appear as follows:

Title: Man in Boat

Title Type: Main Title

Title: Triptych of Men in Boats

Title Type: Series

1.1.2) CONSIDER SOURCE DATA SCRUBBING TO CAPITALIZE ON INSIGHT/INSCRIBE TOOLS

Both the InSight and InScribe tools make excellent use of complex, rich data when available. Cleaning or parsing data to take advantage of these may be a worthwhile effort while preparing data for import into the InSight VRA data model. For example, if your Date field contains a string of data in an early-to-late date range format (e.g. 1901-1999), you may consider breaking these values out into separate fields as such:

Display Date = 1901 – 1999

Early Date = 1901

Late Date = 1999

By adding this specificity to the assignment of data, you will be able to take advantage of advanced date range searching.

Similarly, if your data dimensions are carried as data strings in a single field (e.g. Dimensions = 10 cm. H x 10 cm. W x 10 cm L), you may consider breaking these values out into separate fields as such:

Numeric Measurement = 10

Measurement Unit = cm

Measurement Type = H (W/L)

By distinguishing the components and assigning them to distinct fields, you will be able to take advantage of the auto-population of the Measurement and Scaling tool in InSight.

1.1.3) ESTABLISH AND/OR POPULATE REQUIRED DATA FIELDS

Evaluate your data for categories that contain significant and/or unique data values that are required for accurate collection configuration in the InSight VRA model. Collection administrators should assign identifying values to records and images, and determine a unique linking value that connects the two. This can take a number of forms, and include some of the following: accession numbers, image file names, and unique series numbers. These values should have unique, non-repeating characteristics that will allow you to distinguish between individual images and records, and also allow you to link multiple images and records.

1.1.4) ESTABLISH AND/OR POPULATE FIELDS REQUIRED TO ACCOMMODATE IMAGE/OBJECT LINKING

Depending on the characteristics of your collection, methods of working with InScribe to configure image/object linking may vary. In all cases, at least one instance of a unique linking value is required.

The InSight VRA model is predicated upon the distinction between Works and Reproductions. However, if your collection data is configured so that there is a simple one to one relationship between your digital image and a record (either Work or Reproduction), it is not required that this distinction between Works and Reproductions be employed.

If you would like to have a pre-established relationship between a Work Record and a corresponding Reproduction Record, it is suggested that prior to data migration, this relationship is established in your source data (for an example, see Appendix A).

In the InSight VRA data model, the fields most commonly used and recommended for this Work to Repro linking are the Work Record ID field and the Repro Record ID field.

The default configuration established for InSight Standard in the InScribe tool presents the Work Record as your primary template, with a small subset of Reproduction Record fields embedded. The subset of Reproduction Record fields include the Reproduction Record ID, as this serves as a visible and unique field for an individual Reproduction.

Multiple Reproduction Records can be linked to a single Work Record if you want to use the Work Record as an authority for many Reproductions.

1.1.5) ESTABLISH “PREFERRED ORDER” FIELDS

The InSight Standard VRA structure allows you to define a single “preferred” value where multiple values exist within a record. For example, if your data contains “Types” or qualifiers as explained in section 1.1.1, you can select a single category type to establish as the preferred value. Thus, if you have a number of Date fields (e.g. Display Date, Early Date, Late Date) and you would like to define the Display Date as having the characteristic of “preferred value” – thus listing/displaying it first – you would indicate this by arranging this column of data first in the sequence of Date columns to import.

1.1.6) REVIEW STANDARDS MAPPING FOR EXPECTED RESULTS

The InSight Standard VRA model employs the Getty Crosswalk to determine data standards mapping. For a full explanation of this crosswalk, see:
http://www.getty.edu/research/institute/standards/intrometadata/3_crosswalks/index.html

1.1) EMPLOY DATA MIGRATION SCRIPT TO IMPORT DATA TO INSIGHT VRA MODEL

To assist in the migration of your source data, and included with the InSight VRA data model is a Perl import script. Refer to your InSight 4.1 CD. Look for the Perl script in Utilities/VRA/VRAImport.pl for a detailed description of data preparation, acceptable import formats, and other associated requirements.

1.2) RUN INDEXER

Refer to *Admin Tools User Guide, Chapter 4, Section 2: Invoking Indexer*. The indexer addresses your source data and does not assume the presence of image content. If you are utilizing the VRA model, InScribe has been appropriately configured and further modifications are unnecessary. Simply apply the Indexer.

IMAGE PROCESSING

Refer to *Chapter 4, Section 3: Using Media Batches*.

IMAGES AND ASSOCIATED RECORDS

Refer to *Chapter 4, Section 3, Mapping Objects to Media*.

REVIEW MIGRATED DATA IN INSCRIBE

Review default data display, searching and sorting pre-configurations

Default settings for data display, sorting and searching have been pre-configured for the Standard InSight VRA model. These can be reviewed in Appendix B in http://www.lunaimaging.com/Insight_Support/Appendix_B.xls.

Once you have completed the migration of your data into the InSight VRA model, and taken the necessary steps to ensure proper loading of data into your new InSight VRA collection, you can review these default settings for accuracy. Included in the examples for the Perl script is a sample record that has all data records entered. This will provide you with a guide of expected results (Test.tab.txt).

Preview Migrated Data in InScribe for Accurate Data Transfer

As determined by the default settings for the Standard solution, some data fields that are not made available for display in InSight are made available for cataloging in InScribe. After your collection has been properly configured, review your data in InScribe to ensure that all data has migrated properly.

ENHANCING EXISTING DATA RECORDS

Now that your source data has been successfully implemented, you may want to consider your options for data editing and enhancements. As a default for InSight Standard, the InScribe tool will first present the user with a Work Record template. At the top of the Work Record template, you will see five tabs:

- Search View
- Selection View
- Editor View
- Table View
- Record Preferences

See InScribe Online Help, which can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar, for detailed descriptions of the various InScribe View Tabs.

The initial launch of the Work Record is preset to open in the Search View. Here, a user can employ a simple Keyword search, or utilize the Advanced Search function to restrict the search to a specified field. The following qualifying statements define Advanced Search options:

- Contains
- Begins with
- Ends with
- Equals
- Does Not Equal
- Does Not Contain

Refer to InScribe Online Help, which can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar, for detailed descriptions of the Search View functions.

The “Show All” button is another option provided in the Search View to locate existing records. By clicking “Show All”, all available Work Records will be displayed in one of the following: Selection View, Editor View or Table View. For the purpose of enhancing or modifying data, you may select either the Editor View or the Table View. In these views, you will be allowed (depending on privilege level assigned) to modify your Work Record.

1.1) CHARACTERISTICS OF THE WORK RECORD

A Work Record is comprised of both Dependant and Independent records. In the Standard InSight VRA configuration, the Work Record displays a subset of the data fields available in the each of the Independent records.

For example, the Creator fields displayed in the Work Record are:

- Creator Name
- Creator Dates
- Creator Nationality
- Creator Role
- Creator Role Notes

If you were to select the Work Creator Record from the File menu – Open Record option, you would see the full list of Creator fields associated with the category:

- Creator Name
- Creator Last Name
- Creator First Name
- Creator Name Variant
- Creator Dates
- Creator Early Date
- Creator Late Date
- Creator Nationality
- Creator Notes
- Creator Type

Dependant record types are also contained within the Work Record. These record types do not function as Independent records and are tied directly to the Work Record in which they are cataloged.

However, some Dependant Record types have fields that are defined as “Vocabularies”. These fields require that the user make necessary additions and modifications in the Record’s external window by selecting the Record from the File menu – Open Record option.

For example, in the Standard InSight VRA configuration, the Work Title Type field is defined as an Authority. In the Work Record, this field will allow a user to choose pre-established values from the select list provided, or require that the user go to the Title Type Records external window and add new values. Again, this is done by going to the InScribe tool bar, selecting File—Open Record – Title Type. Once new values have been added, these will appear as options within the select list of values established for the Title Type field.

1.2) CHARACTERISTICS OF THE REPRO RECORD

In the Standard InSight VRA configuration, the Work Record is considered the primary template for descriptive cataloging, thus the Reproduction Record can be accessed in two places. First, a subset of the Reproduction Record fields is imbedded in the Work Record, and modifications and additions can be affected here. Alternatively, if you wish to access the full Independent Reproduction Record, you would be required to access it from the File menu – Open Record option. Here, you would be presented with the complete set of the Reproduction data fields available in the Independent Reproduction Record.

CREATING A NEW WORK RECORD

Creation of a new Work Record can occur in the Search, Editor and Table views. In the initial launch of a Work Record in the Search View, you are presented with the option to select “New Record”. When this button is clicked, you are automatically presented with a new Work Record template in the Editor View.

Alternatively, if you are already in the Editor View, to create a new Work Record, simply click “new” to invoke a new, empty Work Record. The same is true for creating a new Work Record in the Table view, click “new” and a new, empty Work Record will be provided.

If you would like to create new Work Records that contain data values that you would like to duplicate into newly created Work Records, simply click the white boxes located to the right of fields that you would like to have carried over.

See InScribe Online Help for a more detailed description of the Field Checkbox (Editor View). InScribe Online Help can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar.

Note: When creating new Work Records, linking fields identified as “required” for linking images and records should be carefully reviewed before saving to ensure that proper value assignment has occurred.

CREATING A NEW REPRODUCTION RECORD

Creation of a new Reproduction Record can occur in the Search, Editor and Table views. In the initial launch of a Reproduction Record in the Search View, you are presented with the option to select “New Record”. When this button is clicked, you are automatically presented with a new Reproduction Record template in the Editor View.

In the Editor View, to create a new Reproduction Record, simply click “new” to invoke a new, empty Work Record. The same is true for creating a new Reproduction Record in the Table view, click “new” and a new, empty Reproduction Record will be provided.

If you would like to create new Reproduction Records that contain data values that you would like duplicated into newly created Reproduction Records, simply click the black boxes located to the right of fields that you would like to have carried over.

See InScribe Online Help for a more detailed description of the Field Checkbox (Editor View). Online Help can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar.

Note: When creating new Reproduction Records, linking fields identified as “required” for linking images and records should be carefully reviewed before saving to ensure that proper value assignment has occurred.

In the InSight Standard VRA configuration, new Reproduction Records can also be created within the context of the Work Record by simply clicking the (+) symbol at the top of the imbedded Reproduction Record fields. By creating new Reproduction Records in this manner, you are automatically creating a link between the Work Record and the new Reproduction Record.

See InScribe Online Help for a more detailed description of the Plus/Minus Buttons (Editor View). Online Help can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar.

EDITING/ENHANCING VALUE LISTS

As described above, there are various Record/Field Types. In the InSight Standard VRA configuration, a number of fields are restricted from having data to be entered. These Authority fields have been restricted so that data values cannot be added or modified unless an authorized administrator has added them to the value list. In these examples, a user is only allowed to add prescribed data by selecting the appropriate term(s) from the value list.

For example, a collection administrator may determine a restricted list of acceptable terms for a given field, and data entry into this field will be restricted to the specified set of terms. These terms will be assigned, and made available to the user in the associated value list. If a user attempts to add terms outside of the prescribed values, they will be given a prompt: ***“The value entered in the Title Type field must come from the value list.”***

Depending on the permissions/restrictions assigned to a user, it is possible to add new terms to a value list by selecting the desired Record from the File menu – Open Record option. This action will bring you to the external window for the Record, and by clicking New Record, the Editor View will be invoked, and new terms can be entered

and saved. The new terms saved into the Authority will now be available as part of the value list for the field within the context of the Work Record.

SEARCHING FOR EXISTING WORK AND REPRODUCTION RECORDS

Your collections existing characteristics or future development may require that you locate existing Work or Reproduction records to modify content, delete content, or add links between previously unrelated works and images. Searches for existing records and images can be performed in a number of places in InScribe.

1.1) SEARCHING FOR EXISTING RECORDS

In the Records Search View, a search can be performed by selecting the appropriate search parameter; and then the user may either enter values directly into the selected field, or utilize the provided value list. Searching works on Independent records and Authority records in the same manner as it does in the primary Work or Reproduction Records

See InScribe Online Help, which can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar, for a more detailed description of the Search View.

1.2) SEARCH AND REPLACE

InScribe provides the user the capability to do global or field specific changes to data. If your collection contains questionable data, misspellings, or unauthorized values, InScribe's Search and Replace tool will allow you to identify all records containing data values that you might like to replace, and make changes to those specific values on a per record or global basis, enabling a collection editor to modify desired sets.

See InScribe Online Help, which can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar, for a more detailed description of the Search View.

Scenario #2 – Migrating to Insight VRA without a Collection

This is the second scenario using a sample workflow approach, showing you how to build a collection. Use this scenario as a guide if you are migrating to Insight VRA and you have no existing collection contents (no digital images and no data).

COLLECTION BUILDING

Begin with Image Processing

There are a few different approaches that can be applied to collection building in InScribe. If your collection currently consists of digital images without associated data, you may opt to begin the task of collection building by first processing digital images, and utilizing the images within InScribe as reference points for the cataloging process.

First, refer to the *Admin Tool User Guide on Managing Media, Chapter 4, Section 3*.

Once your images have been processed and added to the database, you will be able to view them in InScribe with the *Record to Media Mapping Tool*. To view unlinked images in the Record to Media Linking Tool, first go to the Tool bar and select Edit – Record to Media Linking, or use your keyboard and simultaneously press Ctrl+E to invoke the Record to Media Linking tool.

In the right window of the Record to Media Linking tool, you will see a “Show unlinked media” button. By clicking “Show unlinked media”, you will be presented with all available, processed image files that have not yet been linked to any records.

By double-clicking on an image, you will be able to bring the image into the image workspace. You will also be provided with the image tool bar that will allow you to maximize, zoom, minimize and move through portions of the selected image.

With the selected image now in the image workspace, you can begin cataloging your data, using the image file as visual reference by opening a Work Record. Invoke a new Work Record by going to the tool bar and selecting File – Open Record.

In the InScribe Standard VRA model, the Work Record is set as your primary template and is recommended for initial cataloging effort when you begin to associate images and records. Part of the Work Record template is an embedded Reproduction Record that can be utilized to catalog image/reproduction-specific information.

It is recommended that the user consider important image file and data record identifiers as part of the workflow when creating a collection from “scratch”. As your collection grows, consistency in the application of record identifiers will allow you to easily locate records and images for future modifications to record assignment and content.

Example 1:

As a simple example of the scenario described above, imagine that you have employed the proper steps to process your images and have loaded them into your database, and now you are prepared to catalog.

1. First, launch your InScribe client. You will be presented with the default Work Record Template set in the Search View.

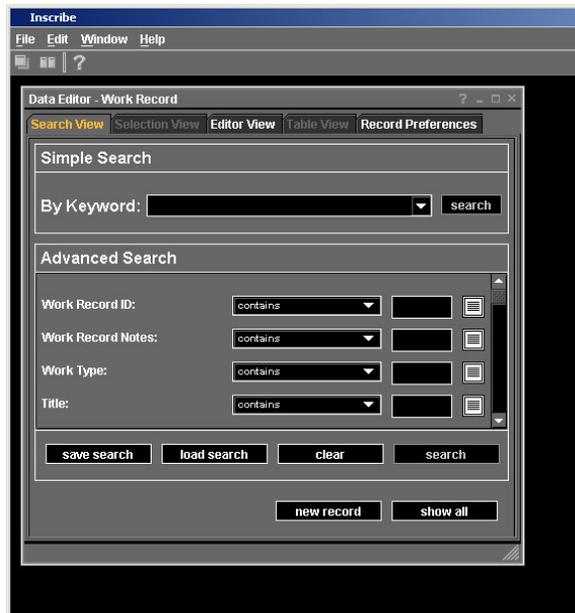


Figure 13 - Search View

2. Select "NEW RECORD". The Work Record template will switch over to the Editor View, and will allow you to add data to the fields presented.



Figure 14 - Editor View

3. As an example of a recommended workflow and procedure, you may consider assigning data to the Work Record ID field and/or the Repro Record ID field – thus ensuring that your image and data have a unique, visible link in your data editing tool. Depending on the source reference materials available to you, add data to the appropriate descriptive fields provided in the Work Record.

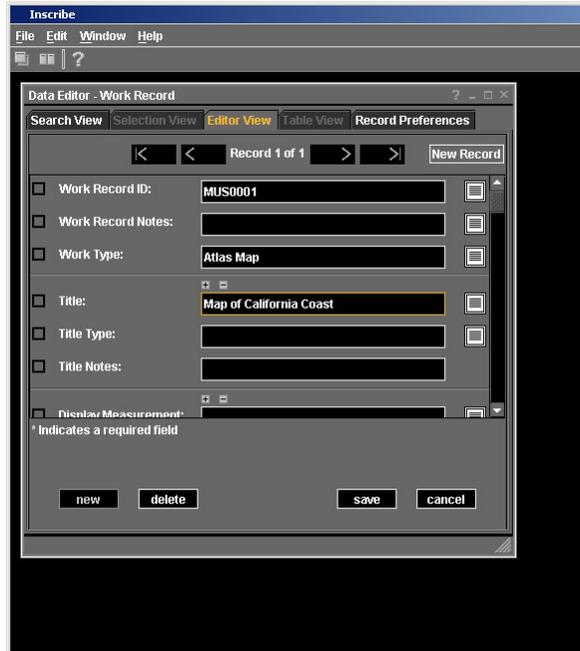


Figure 15 - Assigning Data to Work Record ID Fields

4. Save your data to the Work Record that you have created by clicking the "Save" button. You will be prompted in the lower left of the screen that your save has been successful.
5. In the Record to Media linking tool, you can locate unlinked records by selecting the "Show unlinked records" button. When you select this button unlinked, saved records will appear in the left window. See the example below for the results shown in the image above where Work Record ID = MUS0001 + Tile = Atlas Map. You will see the selected image highlighted in Red and the newly created record listed in the left window.

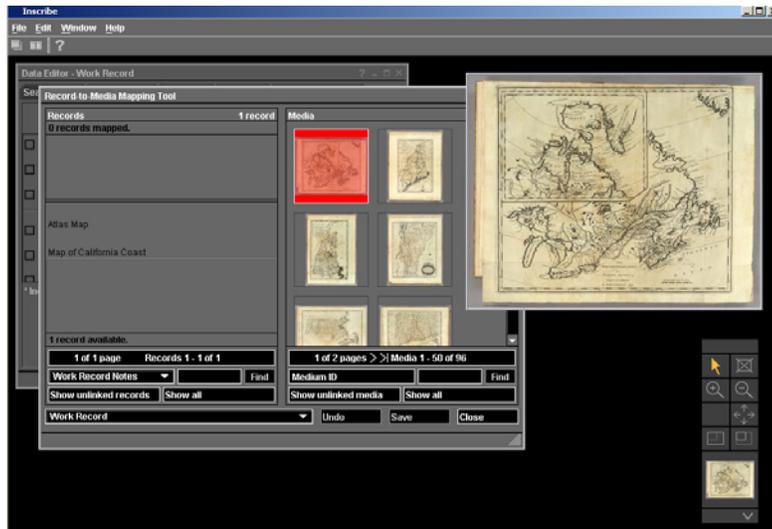


Figure 16 - Record-to-Media Mapping Tool

6. To link the selected Media file to the new Work Record you have just created, click on the image so that it is highlighted, and then click on the appropriate record in the left window. You will be given a prompt asking if you wish to proceed with the linking operation.



Figure 17 - Mapping Confirmation

7. By selecting "Yes," you will have created the link between your Media file and your Work Record. Once this action is saved, you will see the resulting link in both windows. The Media will be highlighted in RED and the associated Work Record will appear highlighted in BLUE.

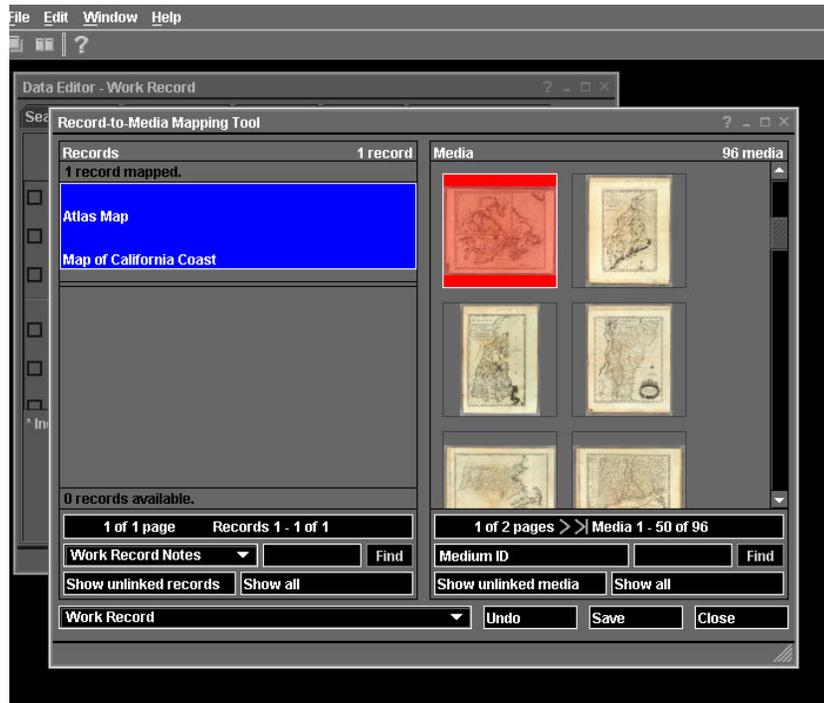


Figure 18 - Link Created Between Media File and Work Record

BEGIN WITH BASIC RECORD CREATION

Another workflow option users may consider for collection building is to begin with basic record creation. In this scenario, collection owners may elect to create data prior to processing and linking digital images.

Again, it is important to consider the structure and content of the collection you intend to build. Similar to some of the data migration issues discussed in Section 1: Data Migration, bear in mind the field options that are provided to you in the InSight VRA data model, and identify those that will assist you in anchoring your records and images within the structure of your collection.

It is recommended that in your cataloging guidelines, you identify fields such as Work Record ID or Repro Record ID as required fields. The unique data values applied in these fields will assist you in the effort to uniquely distinguish each record and their associated images.

Once you have established your InSight VRA database install, and have successfully installed the InSight and InScribe clients, refer to *InSight Installation and Configuration Manual*. You will have access to the InSight VRA data model pre-configured in InScribe. The default settings established for the InSight VRA model are configured so that upon launch of the InScribe tool, you will be presented with a Work Record in the Search View.

InScribe allows for a very flexible approach to cataloging. Independent Authority records for Works, Creators, Reproductions and more can be established individually. However, for the purpose of this example, the Work Record will serve as the primary entry point.

EXAMPLE 2:

1. Launch your InScribe client. You will be presented with the default Work Record Template set in the Search View.

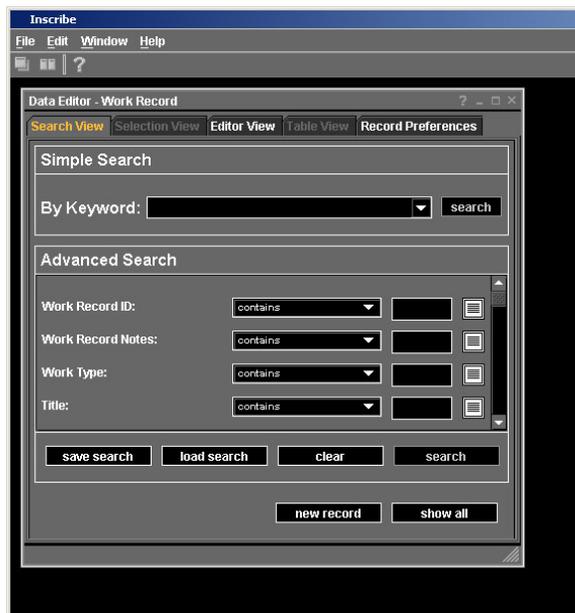


Figure 19 - Work Record Template

2. Select "NEW RECORD". The Work Record template will switch over to the Editor View, and will allow you to add data to the fields presented.
3. As an example of recommended workflow and procedure, consider assigning data to the Work Record ID field and/or the Repro Record ID field – thus ensuring that your image and data have a unique, visible link in your data editing tool. Depending on the source reference materials available to you, add data to the appropriate descriptive fields provided in the Work Record.

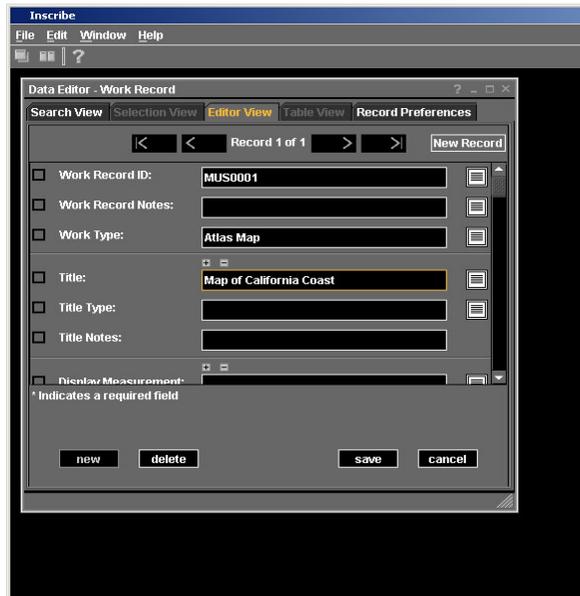


Figure 20 - Assign Data to Work Record Fields

4. Save your data to the Work Record that you have created by clicking the “Save” button. You will be prompted in the lower left of the screen that your save has been successful.

You may continue to add records as your collection requires, or if you would like to establish Authority records for future additions to your collection, you may consider enhancing your data by adding richness to the provided Independent Record Types such as Work Creator.

5. To access the Work Creator Record, simply go to the InScribe tool bar and select File – Open Record – Work Creator. The Work Creator Record will appear in the workspace set to Search View.



Figure 21 - New Work Creator Record

6. To create a new Work Creator Record, click on the “New Record” button, and the window will shift to the Editor View and you will be provided with a new, empty Work Creator Record.

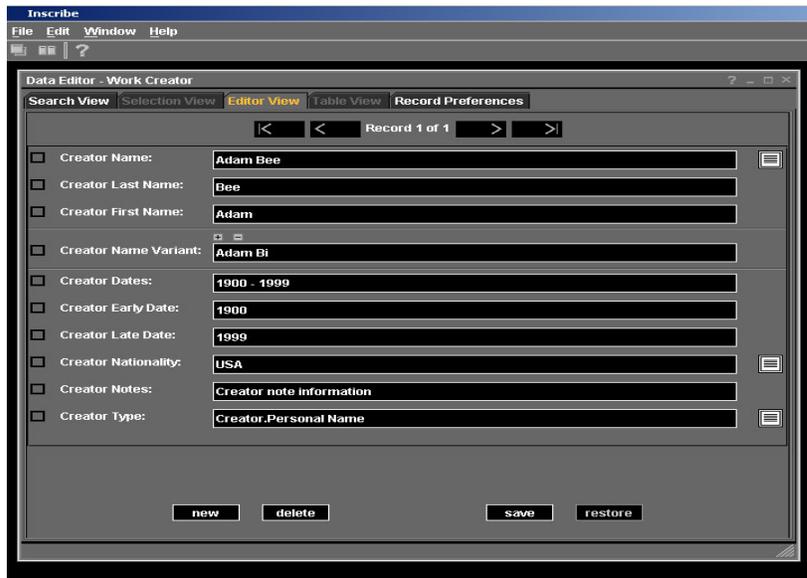


Figure 22 - Editor View for Work Creator

You may continue to add Work Creator Records as Authority files by selecting “New Record”. The data contained in your Work Creator Records will be available to you when searching for or adding data to your Work Records.

- To add your new Creator Record to an existing or new Work Record, select the desired Creator field (e.g. Creator Name) and either type the Creator Name search term into the field, and click “Search” – or utilize the select list provided by clicking the select list box on the far right of the field, as seen in the example below:

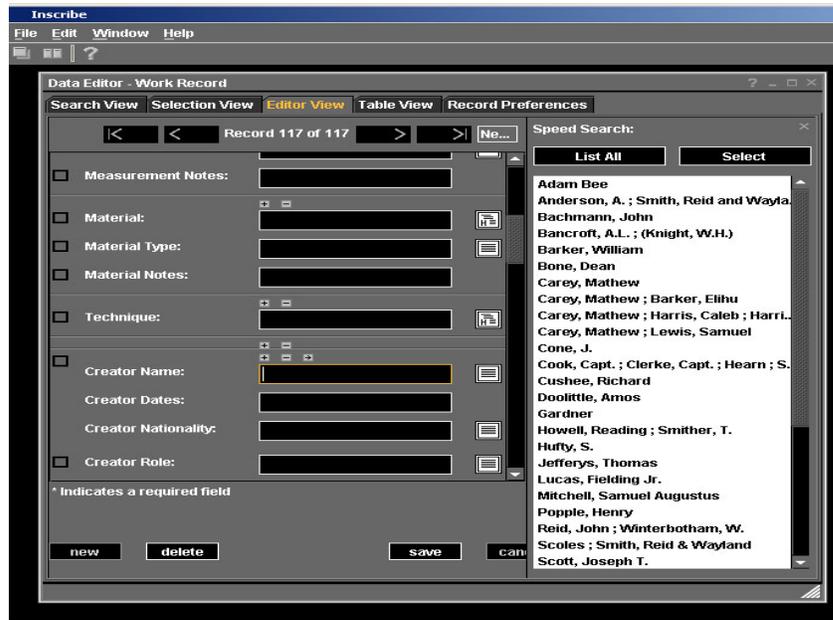


Figure 23 - Utilizing the Select List

8. Select the desired term, in this case “Adam Bee” to enter into the Creator Name field, by double clicking on the term – or by clicking the “select” button. This will add the appropriate term into the field you have selected, and will auto-enter all associated Authority data for that Work Creator Record.

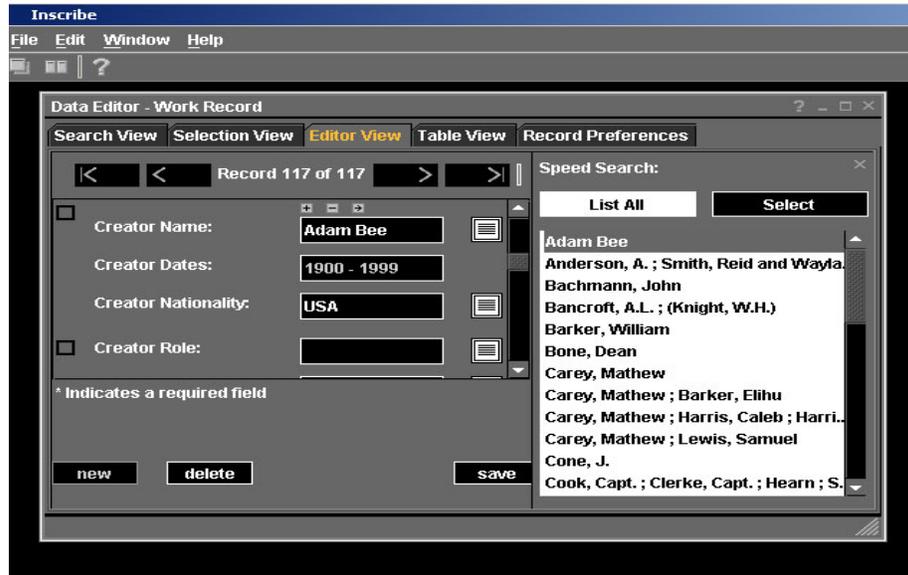


Figure 24 - Associated Authority Data for Work Creator Record

Similar steps can be taken to create other Authority files for use within the context of cataloging a Work Record. See the FILE –OPEN RECORD option for the provided list of independent options.

All unlinked data records created will be available to you in the RECORD TO MEDIA LINKING tool. When you have processed your images and wish to create links between them, there are a number of approaches that can be applied to locate “orphan” records and associate them with the appropriate images. One option is as follows:

Go to the InScribe tool bar and select Edit – Record to Media Linking, or use the Ctrl+E key to invoke the Record to Media Linking window. Follow the steps described in Example 1 above, or see the InScribe Online Help for more information on Record to Media Linking. To access InScribe Online Help, click on the (?) symbol in the upper left hand corner of the tool bar.

LINKING MULTIPLE REPRODUCTION RECORDS/IMAGE FILES TO A WORK AUTHORITY

Below is an example of how to link multiple reproduction records to a work record. In a work record = Work Record ID: W50001, we have linked Reproduction Records R50001, R50002, R50003.

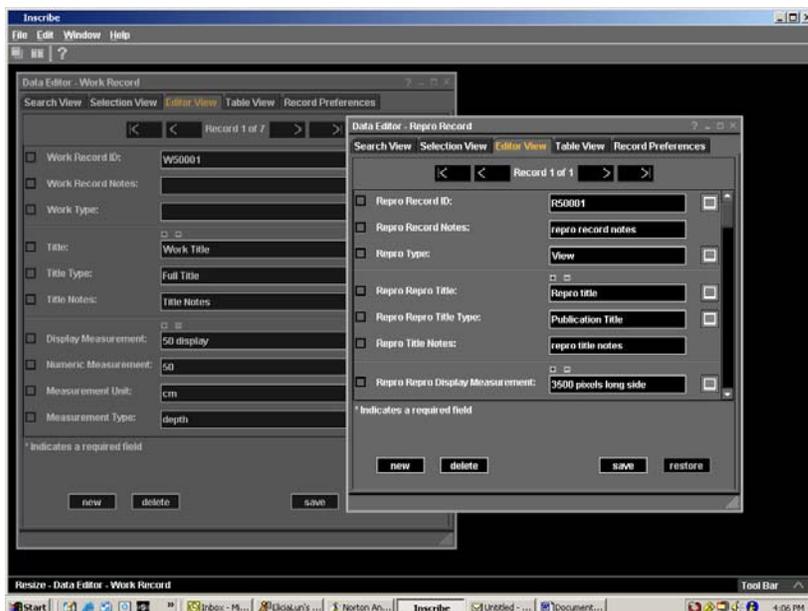


Figure 25 - Associating Image Files with Repro Records

In this case, the cataloger prefers to associate image files with Reproduction Records rather than directly to a Work Record. This allows a single Work Record to function as an authority for multiple images.

1. In the Record to Media Linking Tool, link the desired images to the appropriate Reproduction records by first locating the unlinked reproduction records and unlinked images and making the association between the two. To link the Reproduction Record and selected image, first click on the record, and then the image that should be linked. You will be given a prompt asking if you want to create the link:

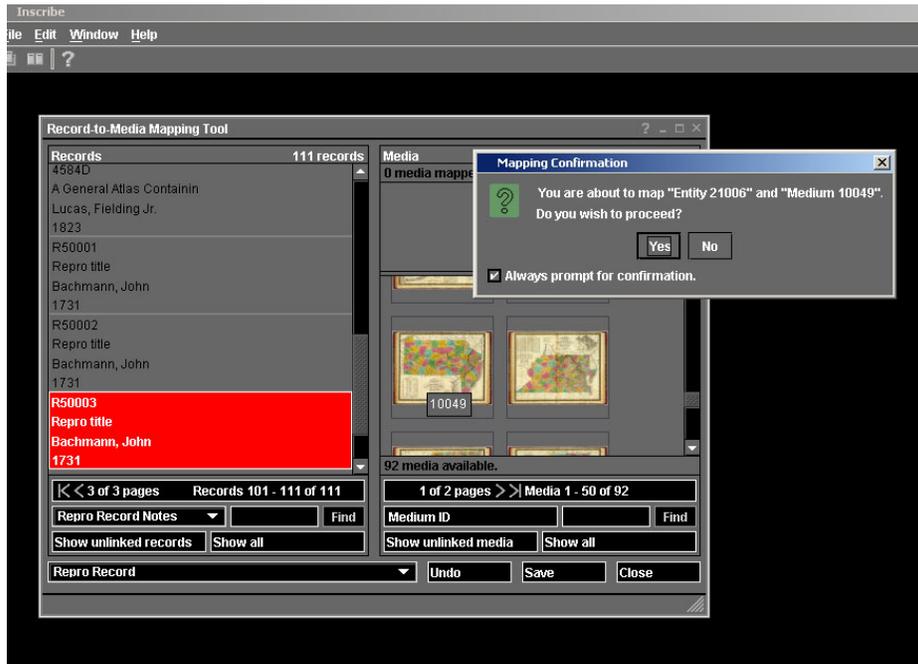


Figure 26 - Mapping Confirmation

2. Select "Yes," and then click "Save" to secure the link. You will see the linked record in Red and media in Blue.

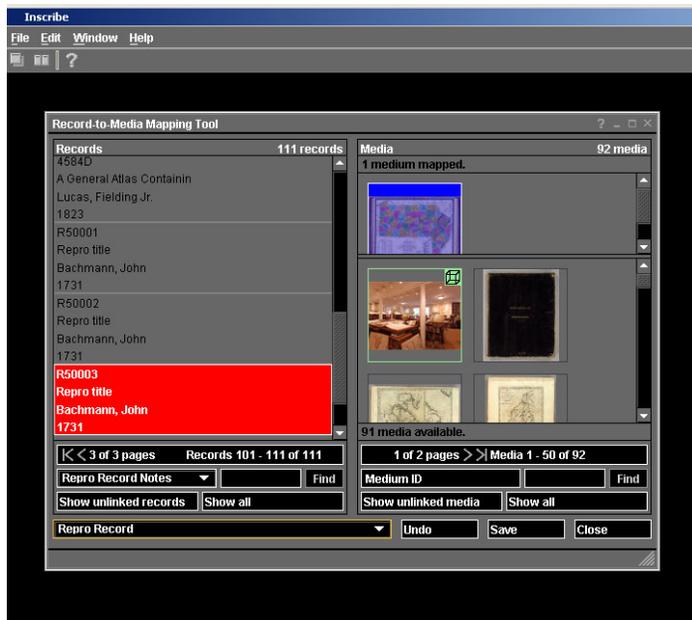


Figure 27 - Linked Media-to-Records Files

Repeat this step for all Reproduction Records and Media files that you wish to link.

3. To associate multiple Reproduction Records to a single Work Record, simply click the (+) button that hovers above the Reproduction Record ID field. This will add Reproduction Record templates in succession to your existing Work Record.

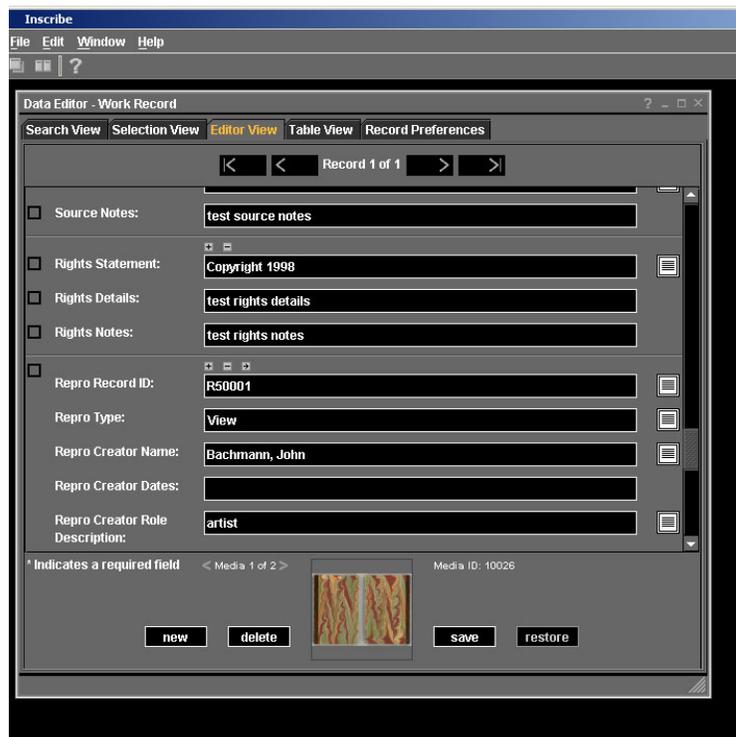


Figure 28 - Associate Multiple Repro Records to a Work Record

4. Select the value list button next to the Reproduction Record ID field to access the available Reproduction Record IDs that are linked to media. In this example, two Reproduction Records with associated Media are linked. In the Thumbnail image view space, you will see the text to the left of the image that indicates that you are viewing: < Media 1 of 2>.

- To access the master Reproduction Record for that media, click the arrow button at the top of the Reproduction Record ID field with the associated Media that you would like to view.

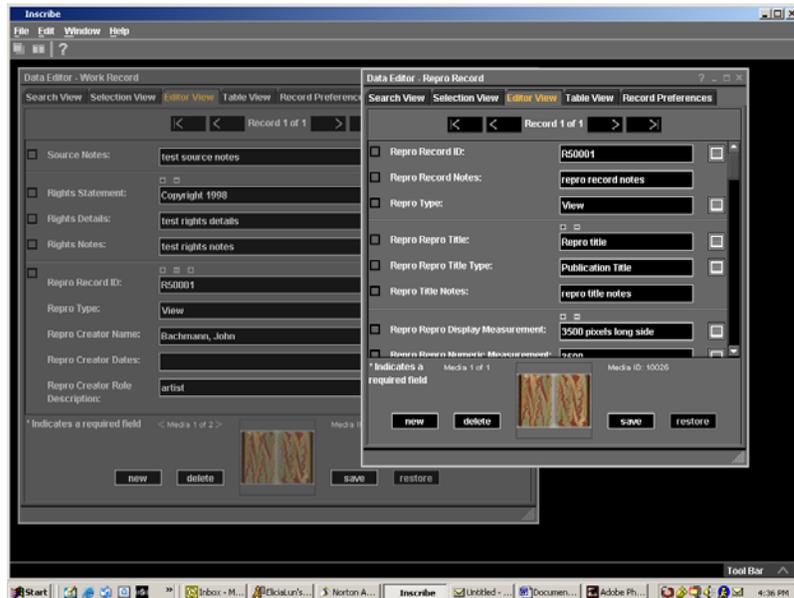


Figure 29 - Access Master Repro Record

Here, you can view both the master reproduction record to which the media is linked, and the Work Record that serves as a descriptive data authority for the reproduction.

- Both images associated with the reproduction record can also be viewed in the Selection View tab. By left clicking on the image, you will be provided with a tool that will allow you to view images associated with a single work successively.



Figure 30 - Image Associated with Repro Record #1



Figure 31 - Image Associated with Repro Record #2

7. It is important for the user to remember that when associating multiple Reproduction Records to a Work Record, that all appropriate associations between the selected reproduction record and the images to which they are linked are also linked properly to the Work Record. Double-check your record-to-media linking in the Record to Media Linking tool to ensure that you have correctly mapped these relationships.

Section 2: General Workflow Guidelines

There are three scenarios within the general workflow guidelines. How would you use InScribe if you have the following:

- Existing collection contents migrating to Insight.
- Flat database structure migrating to Insight.
- No existing collection contents migrating to Insight.

Scenario #1 - Migrating to Insight with a Collection

This scenario provides guidelines if you have existing collection content (Images and Data) and you are migrating to Insight. First, review your source data.

CONSIDER SOURCE DATA SCRUBBING

Consider Source Data Scrubbing to Capitalize on InSight/InScribe Tools

Both the InSight and InScribe tools make excellent use of complex, rich data when available. Cleaning or parsing data to take advantage of these may be a worthwhile effort while preparing data for import into your InSight collection. For example, if your Date field contains a string of data in an early-to-late date range format (e.g. 1901-1999), you may consider breaking these values out into separate fields as such:

Display Date = 1901 – 1999

Early Date = 1901

Late Date = 1999

By adding this specificity to the assignment of data, you will be able to take advantage of advanced date range searching. Similarly, if your data dimensions are carried as data strings in a single field (e.g. Dimensions = 10 cm. H x 10 cm. W x 10 cm L), you may consider breaking these values out into separate fields as such:

Numeric Measurement = 10

Measurement Unit = cm

Measurement Type = H (W/L)

By distinguishing the components and assigning them to distinct fields, you will be able to take advantage of the auto-population of the Measurement and Scaling tool in InSight.

ESTABLISH AND/OR POPULATE REQUIRED DATA FIELDS

Evaluate your data for categories that contain significant and/or unique data values that are required for accurate collection. Collection administrators should assign identifying values to records and images, and determine a unique linking value that connects the two. This can take a number of forms, and include some of the following: accession numbers, image file names, and unique series numbers. These values should have unique, non-repeating characteristics that will allow you to distinguish between individual images and records, and also allow you to link multiple images and records.

ESTABLISH AND/OR POPULATE OTHER REQUIRED FIELDS

Establish and/or populate fields required to accommodate image/object linking

Depending on the characteristics of your collection, methods of working with InScribe to configure image/object linking may vary. In all cases, at least one instance of a unique linking value is required.

If you would like to have a pre-established relationship between a Work Record and a corresponding Reproduction Record, it is suggested that prior to data migration, this relationship is established in your source data (for an example, see Appendix A).

ESTABLISH “PREFERRED ORDER” FIELDS

If you have a number of Date fields (e.g. Display Date, Early Date, Late Date) and you would like to define the Display Date as having the characteristic of “preferred value” – thus listing/displaying it first – you would indicate this by arranging this column of data first in the sequence of Date columns upon import.

REVIEW STANDARDS MAPPING FOR EXPECTED RESULTS

For cross collection searching, InSight employs the Getty Crosswalk to determine data standards mapping. For a full explanation of this crosswalk, see:

http://www.getty.edu/research/institute/standards/intrometadata/3_crosswalks/index.html

Scenario #2 - Migrating to InSight with a Flat Database Structure

This section provides general guidelines for the setup of InScribe to use with a simple, flat database structure.

1. Open the Administrator Tools that supports InSight 4.1 database and log into your collection database.
2. Access InScribe settings.
 - Expand the **InScribe Settings** folder in the Control Panel of the Insight Administrator Console.
 - The InScribe Settings folder contains: Record Types, Record Fields, Record Relationships, Profile Privileges and Approval Levels.

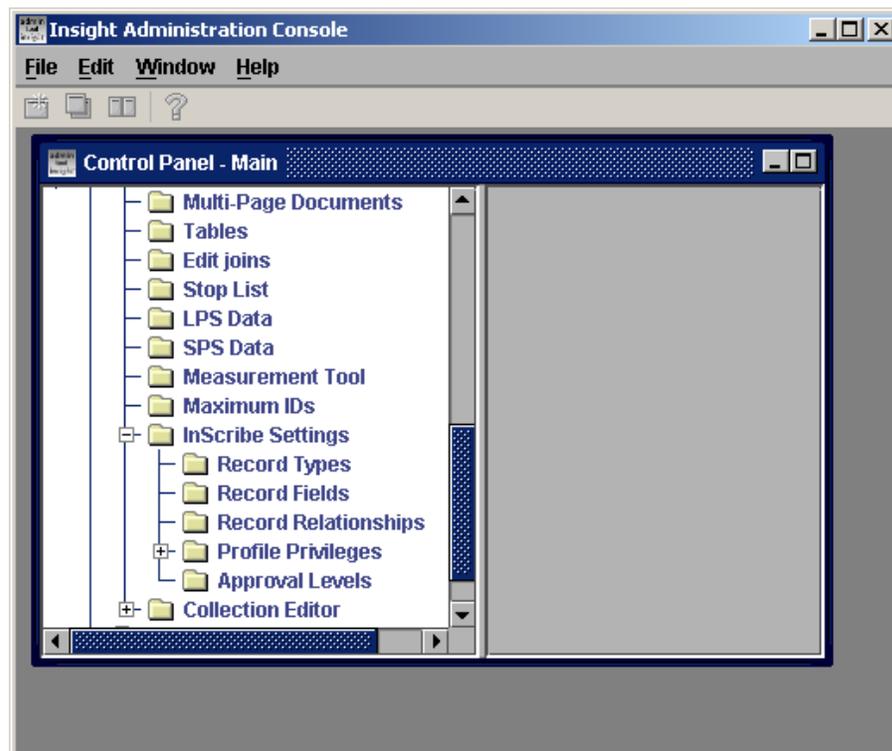


Figure 32 - InScribe Settings Folder

3. Enter a Record Type:
 - Right mouse click on the Record Types and select **New**.
 - An Edit Record Type dialog appears. This window provides you with a number of setting options.

- Enter information in this dialog. In this example, the flat structure dictates a single Record Type: “Main Record”. The Display name can be adjusted to display the Record Type value that best represents your collection structure. In this case, we have assigned “Main Record”.
- Press the **Save** button.

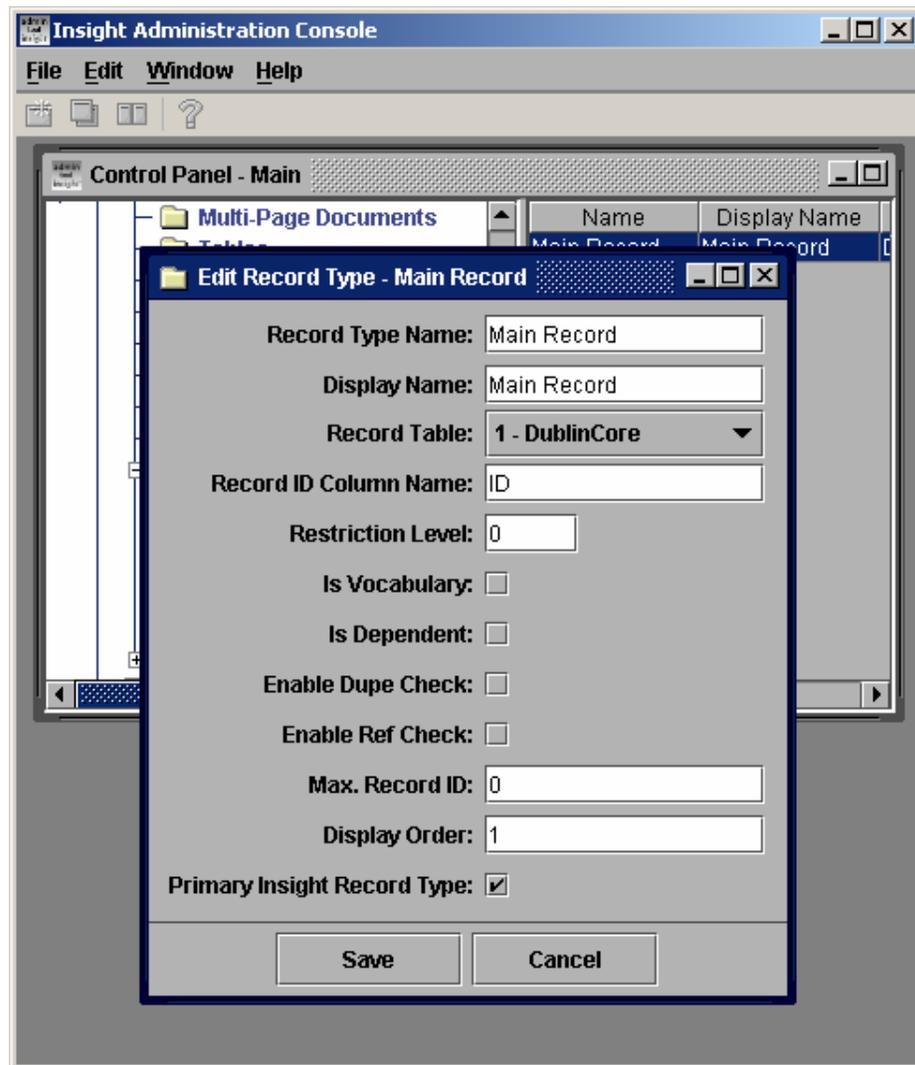


Figure 33 - Edit Record Type

Refer to *Chapter 2* (in this manual), *Record Types* for a more detailed description and definition for each of the provided options.

4. Enter Record Fields:

- Enter the Record Field information dictated by the layout of your collection data.
- Right mouse click on the Record Fields folder and select **New**.
- A Record Field dialog appears.
- Enter the necessary information in the provided dialog fields.
- Press the **Save** button.
- Repeat these steps for all other fields.

Note: For a flat file database DO NOT select the Repeating Values Allowed. Refer to *Chapter 2* (in this manual), *Record Types* for a more detailed description and definition for each of the provided options.

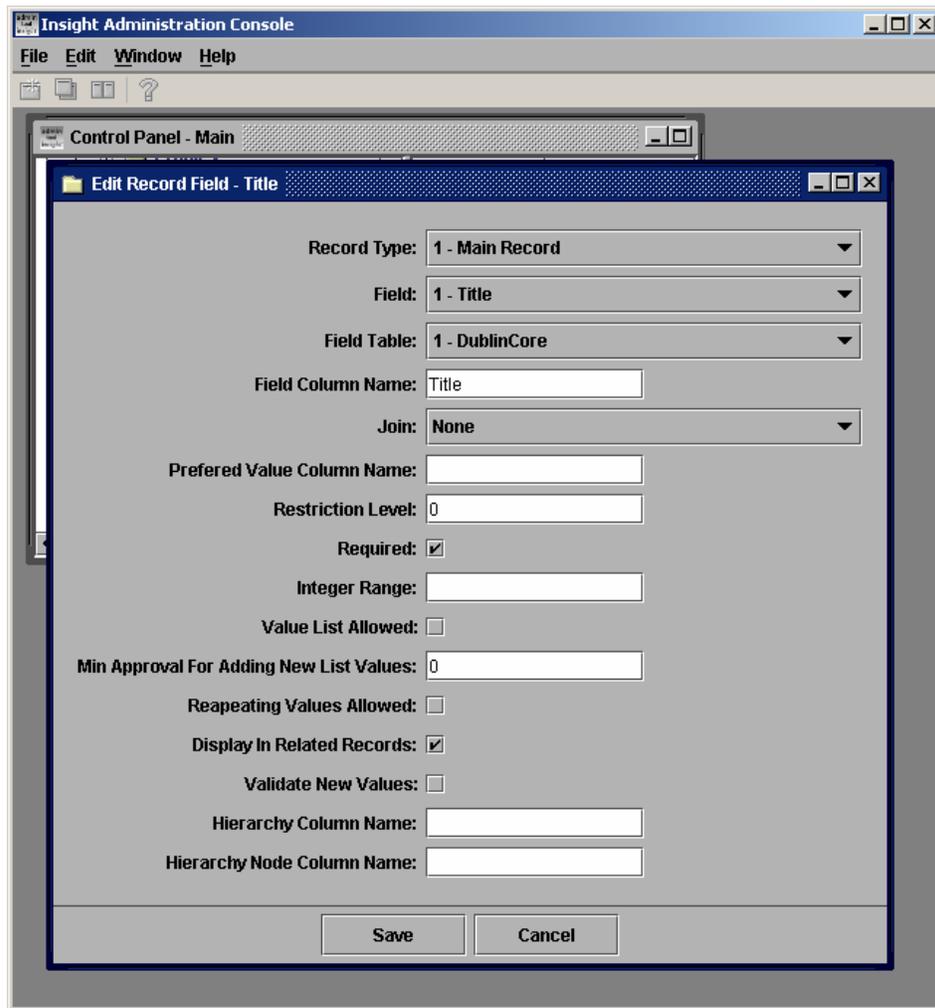


Figure 34 - Edit Record Field Dialog

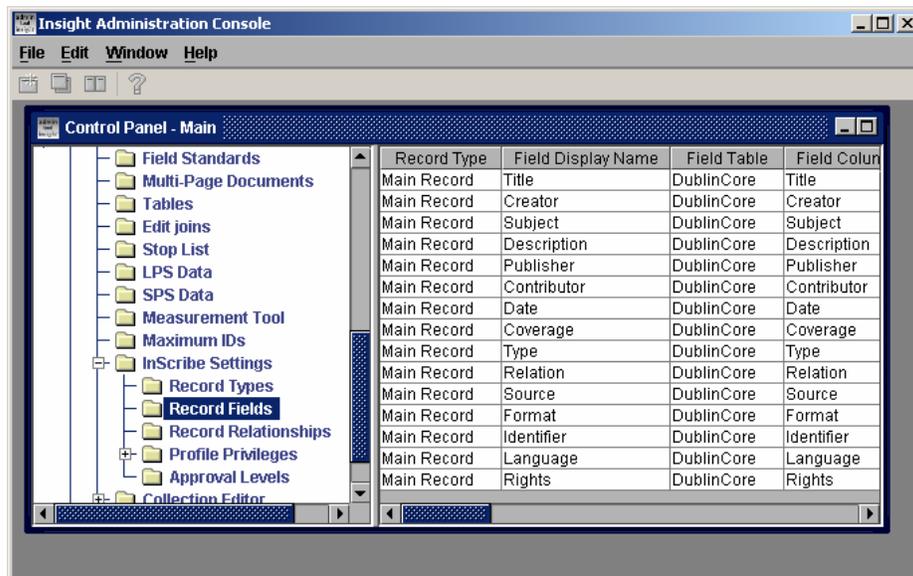


Figure 35 - Summary of Record Fields

5. Setup Record Relationship:

- For a flat structure database, do not define Record Relationships.

6. Set up Profile Privileges:

- Expand the Profile Privileges folder in the Insight Administration Console.
- Click on a profileID. This will list all the profiles that are available for that collection database.
- Highlight a profileID and press the right mouse button and select **Edit**.
- An Editing InScribe Privilege dialog will appear.
- In this dialog you enter privilege permissions for the selected profileID. As the administrator, you will be able to assign the appropriate privileges for each profile. The default settings = 0.
- Press the **Save** button.

(Refer to *Chapter 2*, in this manual, and read *Profile Privileges*.)

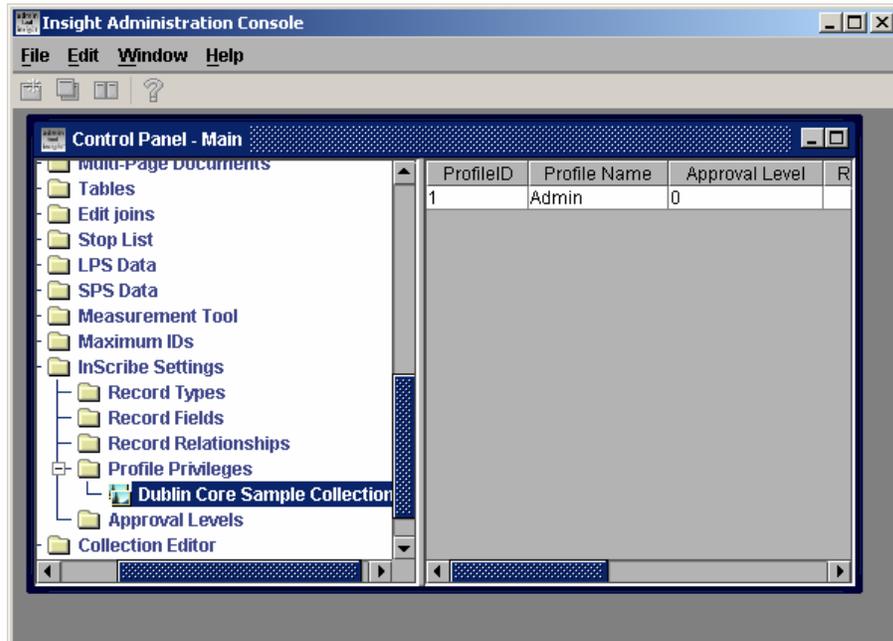


Figure 36 - Selecting Profile ID

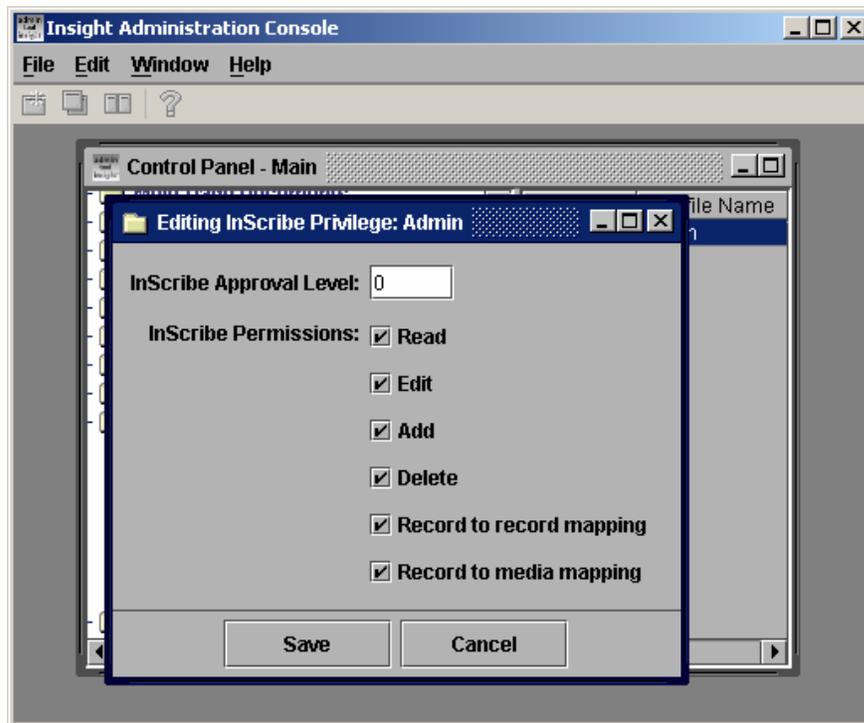


Figure 37 - Editing InScribe Privilege Dialog

7. Setup Approval Levels.

- Highlight the Approval Levels folder in the Console Panel.
- Right mouse click on a row under Commit To Inverted Data and select **Edit**.
- An Edit InScribe Approval Levels dialog will appear.
- Enter the proper approval levels.
- The default for Commit to Inverted Data and Commit to Source Data are set to 0. (0 is the lowest of the approval levels).
- Press the **Save** button.

(Refer to *Chapter 2*, of this manual, to read *Approval Levels*.)

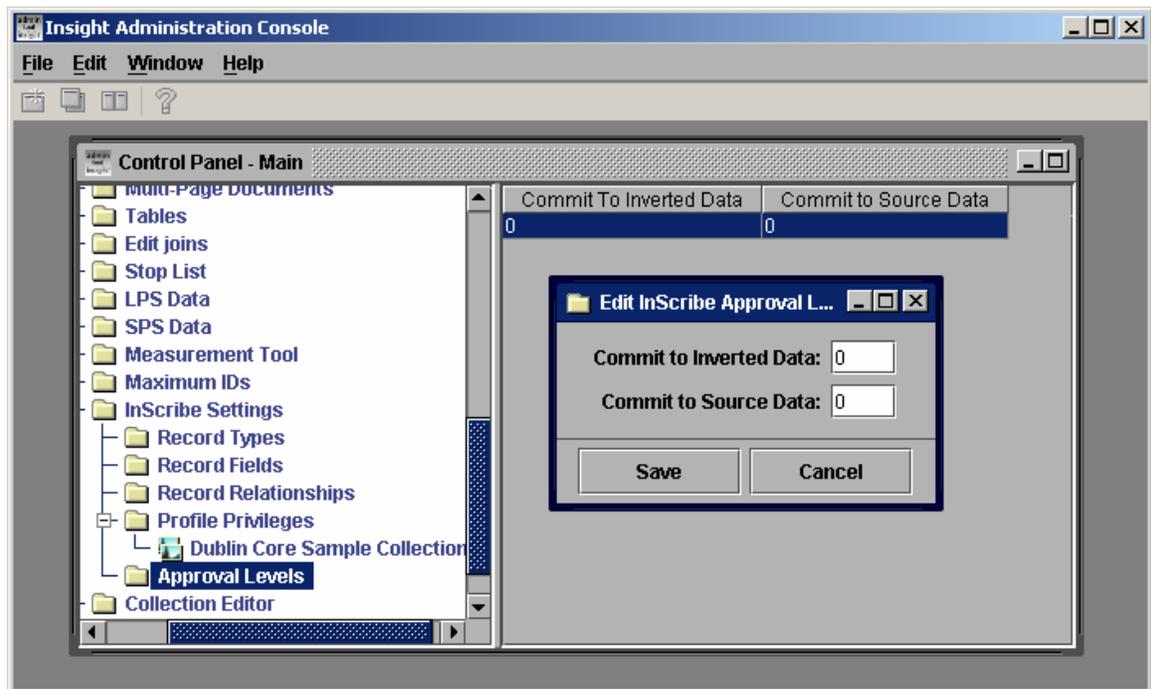


Figure 38 - Edit InScribe Approval Levels

RUN INDEXER

Refer to *Chapter 2* (in this manual), *Inscribe Indexer*. The indexer addresses your source data and does not assume the presence of image content.

REVIEW MIGRATED DATA IN INSCRIBE

Access your newly configured collection in InScribe and review for accuracy.

MIGRATE IMAGES TO INSCRIBE

Refer to the 4.1 upgrade CD. Look in the utilities\Scripts folder. You should execute the script "Migrate_Images_to_Inscribe.sql" on your Insight database. This will make your current images in Insight available in Inscribe.

IMAGE PROCESSING

Reference the appropriate section in the *Admin Tools User Guide, Chapter 4, Section 3, Managing Media*.

IMAGES AND ASSOCIATED RECORDS

Refer to *Admin Tools User Guide, Chapter 4: Working with Collection Manager, Section 3: Mapping Object to Media*.

ENHANCING EXISTING DATA RECORDS

Now that your source data has been successfully implemented, you may want to consider your options for data editing and enhancements. At the top of each of the Record Type templates, you will see five tabs:

- Search View
- Selection View
- Editor View
- Table View
- Record Preferences

See InScribe Online Help for detailed descriptions of the various InScribe View Tabs. The online Help can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar.

The initial launch of a Record is preset to open in the Search View. Here, a user can employ a simple Keyword search, or utilize the Advanced Search function to restrict the search to a specified field. The following qualifying statements define Advanced Search options:

- Contains
- Begins with
- Ends with
- Equals
- Does Not Equal
- Does Not Contain

See InScribe Online Help, which can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar, for detailed descriptions of the Search View functions.

The “Show All” button is another option provided in the Search View to locate existing records. By clicking “Show All”, all available Records will be displayed in one of the following: Selection View, Editor View or Table View. For the purpose of enhancing or modifying data, you may select either the Editor View or the Table View.

In these views, you will be allowed (depending on privilege level assigned) to modify your Work Record.

CREATING A NEW RECORD

Creation of a new record can occur in the Search, Editor and Table views.

In the initial launch of a record in the Search View, you are presented with the option to select “New Record”. When this button is clicked, you are automatically presented with a new record template in the Editor View.

Alternatively, if you are already in the Editor View, to create a new record, simply click “new” to invoke a new, empty record. The same is true for creating a new record in the Table view, click “new” and a new, empty Work Record will be provided.

If you would like to create new records that contain data values that you would like to duplicate into newly created records, simply click the black boxes located to the left of fields that you would like to have carried over.

See InScribe Online Help, which can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar, for a more detailed description of the Field Checkbox (Editor View).

Note: When creating new records, linking fields identified as “required” (for linking images and records) should be carefully reviewed before saving, to ensure that proper value assignment has occurred.

EDITING/ENHANCING VALUE LISTS

As described in the InScribe configuration manual, you can define various Record/Field Types. Fields can be restricted from having data to be entered. These Authority fields can be restricted so that data values cannot be added or modified unless an authorized administrator has added them to the value list. In these examples, a user is only allowed to add prescribed data by selecting the appropriate term(s) from the value list.

For example, a collection administrator may determine a restricted list of acceptable terms for a given field, and data entry into this field will be restricted to the specified set of terms. These terms will be assigned, and made available to the user in the associated value list. If a user attempts to add terms outside of the prescribed values, they will be given a prompt: ***“The value entered in the Title Type field must come from the value list.”***

Depending on the permissions/restrictions assigned to a user, it is possible to add new terms to a value list by selecting the desired Record from the File menu – Open Record option. This action will bring you to the external window for the Record, and by clicking New Record, the Editor View will be invoked, and new terms can be entered and saved. The new terms saved into the Authority will now be available as part of the value list for the field within the context of the Record.

SEARCHING FOR EXISTING RECORDS

Your collection's existing characteristics or future development may require that you locate existing Records to modify content, delete content, or add links between previously unrelated works and images. In the Record's Search View, searches can be performed by first selecting the appropriate search parameter; and then the user may either enter values directly into the selected field, or utilize the provided value list. Searching works in Independent entities and Authority records in the same manner as it does in the primary Records

See InScribe Online Help, which can be activated by clicking the (?) symbol in the upper left corner of the InScribe tool bar, for a more detailed description of the Search View.

Scenario #3 - Migrating to Insight without a Collection

This section discusses what you would do if you are migrating to Insight and do not have any existing collection contents (no digital images or data).

COLLECTION BUILDING

Begin with Image Processing

There are a few different approaches that can be applied to collection building in InScribe. If your collection currently consists of digital images without associated data, you may opt to begin the task of collection building by first processing digital images, and utilizing the images within InScribe as reference points for the cataloging process.

First, see the *Admin Tools User Guide, Chapter 4, Section 3: Using Media Batches*.

Once your images have been processed and added to the database, you will be able to view them in InScribe with the Record to Media Mapping Tool. To view unlinked images in the Record to Media Linking Tool, first go to the Tool bar and select Edit – Record to Media Linking, or use your keyboard and simultaneously press Ctrl+E to invoke the Record to Media Linking tool.

In the right window of the Record to Media Linking tool, you will see a “Show unlinked media” button. By clicking “Show unlinked media”, you will be presented with all available, processed image files that have not yet been linked to any records.

By double-clicking on an image, you will be able to bring the image into the image workspace. You will also be provided with the image tool bar that will allow you to maximize, zoom, minimize and move through portions of the selected image.

With the selected image now in the image workspace, you can begin cataloging your data, using the image file as visual reference by opening a Work Record. Invoke a new Work Record by going to the tool bar and selecting File – Open Record.

It is recommended that the user consider important image files and data record identifiers as part of the workflow when creating a collection from “scratch”. As your collection grows, consistency in the application of record identifiers will allow you to easily locate records and images for future modifications to record assignments and content.

Example 1:

As an example of the scenario described above, imagine that you have employed the proper steps to process your images and have loaded them into your database. Now, you are prepared to catalog.

1. Launch your InScribe client. You will be presented with the default Record Template that you have defined in the initial set up of InScribe (set to the Search View).



Figure 39 - Default Record Template

2. Select "New Record". The Record template will switch over to the Editor View, and will allow you to add data to the fields presented.



Figure 40 - Editor View

As an example of a recommended workflow and procedure, you may consider assigning data to the Record ID field. In this manner, you can ensure that your image and data have a unique, visible link in your data-editing tool. Depending on the source reference material available to you, add data to the appropriate descriptive fields provided in the Record.

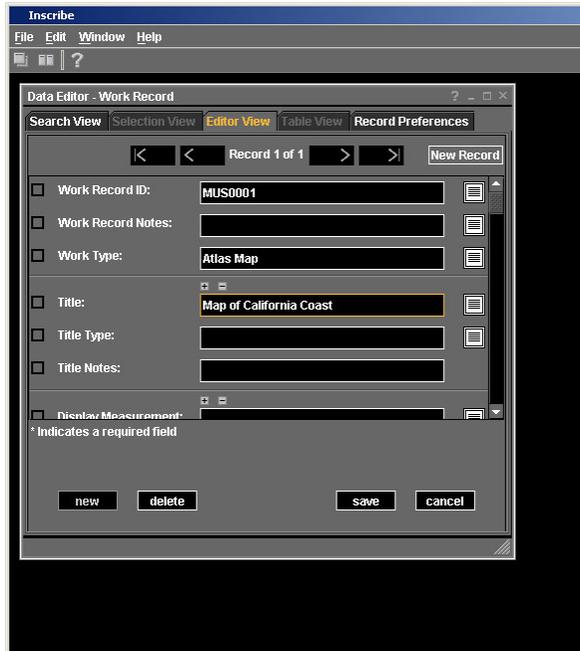


Figure 41 - Assigning Data to Record ID Field

3. Save your data to the Record that you have created by clicking the “Save” button. You will see a prompt at the left of the screen that your save has been successful.

- In the Record to Media linking tool, you can locate unlinked records by selecting the “Show unlinked records” button. When you select this button, all saved, unlinked records will appear in the left window. See the example below for the results shown in the image above where Work Record ID = MUS0001 + Tile = Atlas Map. You will see the selected image highlighted in Red and the newly created record listed in the left window.

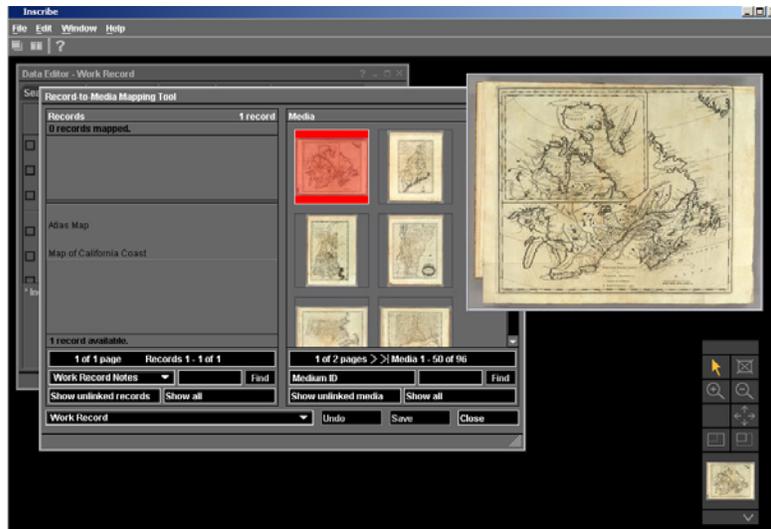


Figure 42 - Record to Media Mapping Tool

- To link the selected Media file to the new record you have just created, click on the image so that it is highlighted, and then click on the appropriate record in the left window. You will be given a prompt asking if you wish to proceed with the linking operation.



Figure 43 - Mapping Confirmation

6. By selecting “Yes,” you will have created the link between your Media file and your Record. Once this action is saved, you will see the resulting link in both windows. The Media will be highlighted in RED and the associated Work Record will appear highlighted in BLUE.

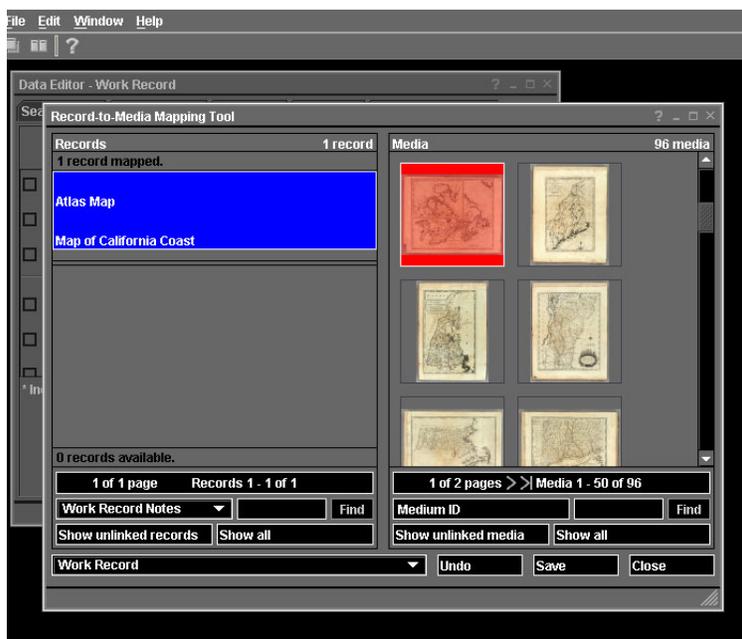


Figure 44 - Link Created Between Media File and Record

BASIC RECORD CREATION

Another workflow option that users may consider for collection building is to begin with basic record creation. In this scenario, collection owners may elect to create data prior to processing and linking digital images.

Again, it is important to consider the structure and content of the collection you intend to build. Identify those fields that will assist you in anchoring your records and images within the structure of your collection.

It is recommended that in your cataloging guidelines, you identify fields such as Record ID as required fields. The unique data values applied in these fields will assist you in the effort to uniquely distinguish each record and their associated images.

Once you have established your database install, and have successfully installed the InSight and InScribe clients, (refer to the *InSight Installation and Configuration Manual*) you will have access to InScribe.

InScribe allows for a very flexible approach to cataloging. Independent Authority records for Works, Creators, Reproductions, and more can be established individually. However, for the purpose of this example, the Work Record will serve as the primary entry point.

Example 2:

1. Launch your InScribe client. You will be presented with the Record Template you have established in the InScribe configuration process (set to the Search View).

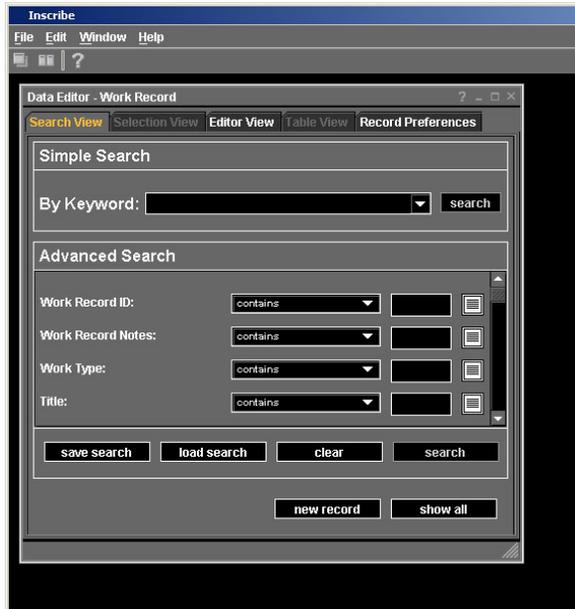


Figure 45 - Work Record Template

2. Select “New Record”. The Record template will switch over to the Editor View, and will allow you to add data to the fields presented. As an example of recommended workflow and procedures, consider assigning data to the Record ID field– thus ensuring that your image and data have a unique, visible link in your data editing tool. Depending on the source reference materials available to you, add data to the appropriate descriptive fields provided in the Record.

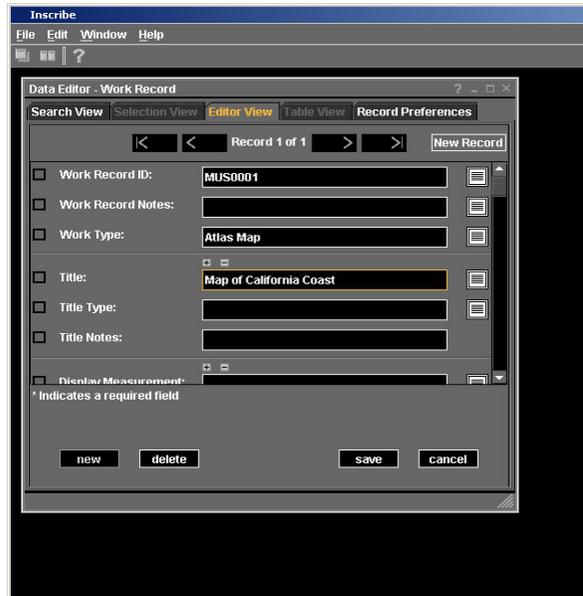


Figure 46 - Assign Data to Work Record Fields

3. Save your data to the record that you have created by clicking the “Save” button. You will be prompted in the lower left of the screen that your save has been successful.
4. You may continue to add records as your collection requires. If you would like to establish Authority records for future additions to your collection, you may consider enhancing your data by adding richness to Record Types established in your configuration as Primary Records. In this example, the Primary record is defined as a “Work Creator Record.” To access the Record, simply go to the InScribe tool bar and select File – Open Record – Work Creator. The Work Creator Record will appear in the workspace set to Search View.

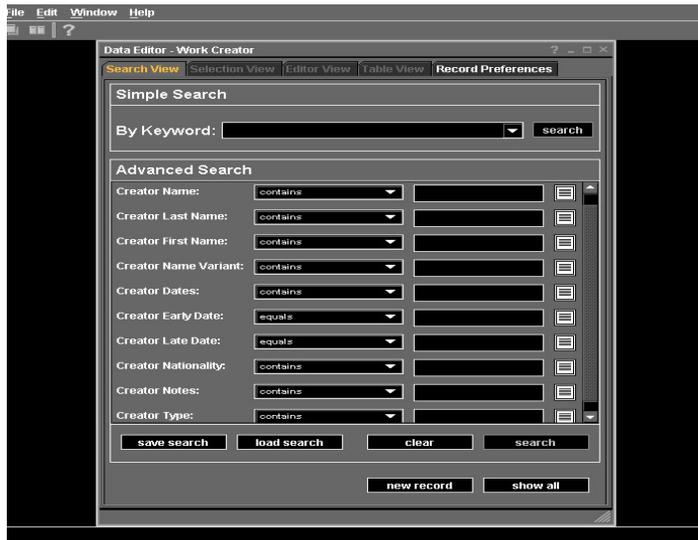


Figure 47 -New Work Creator Record

5. To create a new Work Creator Record, click on the “New Record” button, and the window will shift to the Editor View and you will be provided with a new, empty Work Creator Record.

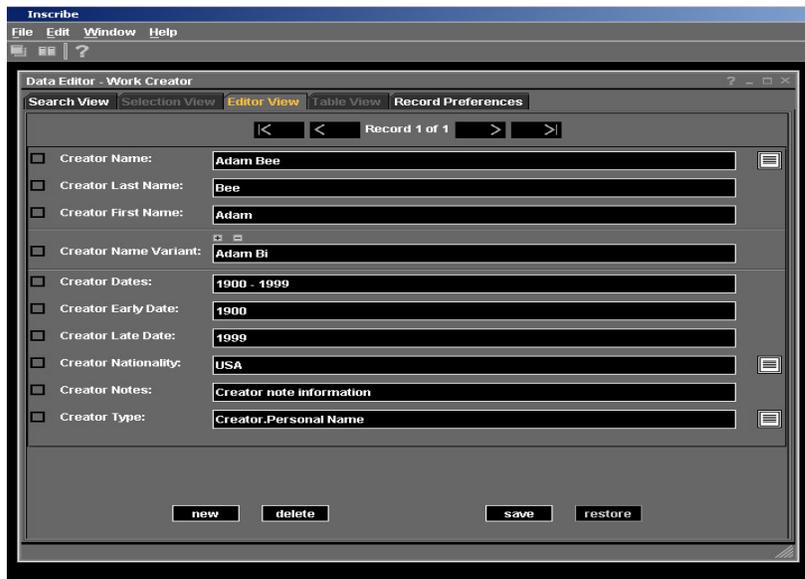


Figure 48 - Editor View for Work Creator

6. You may continue to add Work Creator Records as Authority files by selecting “New Record”. The data contained in your Work Creator Record will be available to you when searching for or adding data to your Work Records.

- To add your new Creator Record to an existing or new Work Record, select the desired Creator field (e.g. Creator Name) and either type the Creator Name search term into the field, and click “Search” – or utilize the select list provided by clicking the select list box on the far right of the field as seen in the example below:

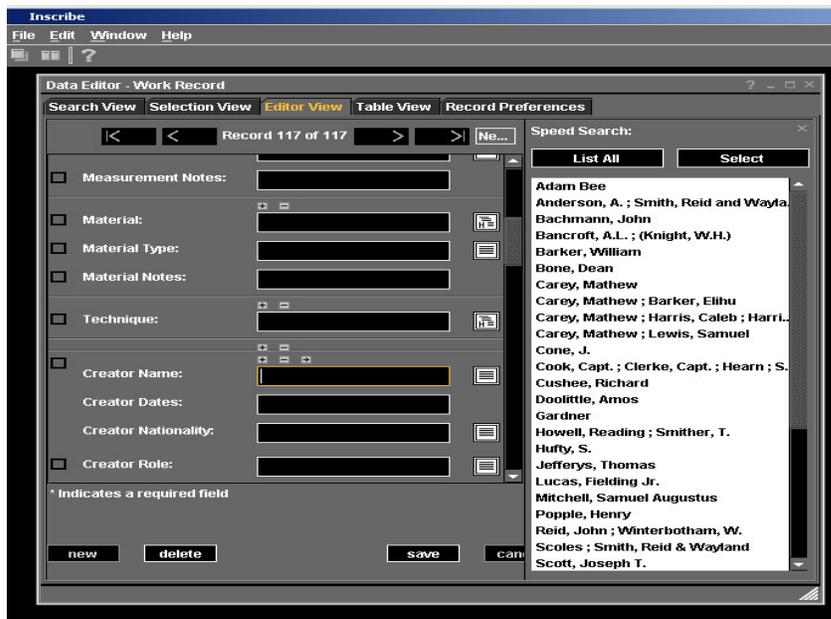


Figure 49 - Utilizing Select List

- Select the desired term, in this case “Adam Bee” to enter into the Creator Name field, by double clicking on the term – or – by clicking the “select” button. This will add the appropriate term into the field you have selected, and will auto-enter all associated Authority data for that Work Creator Record.



Figure 50 - Associated Authority Data for Work Creator Record

Similar steps can be taken to create other Authority files for use within the context of cataloging a Work. See the File –Open Record option for the provided list of independent options.

9. All unlinked data records created will be available to you in the Record to Media Linking tool. When you have processed your images and wish to create links between them, there are a number of approaches that can be applied to locate “orphan” records and associate them with the appropriate images. One option is as follows:

Go to the InScribe tool bar and select Edit – Record to Media Linking, or use the Ctrl+E key to invoke the Record to Media Linking window. Follow the steps described in Example 1 above, or also see the InScribe Online Help for more information on Record to Media Linking. To access InScribe Online Help, click on the (?) symbol in the upper left hand corner of the tool bar.

Relationship Between a Work Record and Reproduction Records

Below are examples of relationships between a work record and corresponding reproduction records.

Table Name	WorkInfo	ReproInfo	WorkType	WorkTitle	WorkCreator	WorkCreator	WorkDates	WorkLocation	WorkRepository	WorkCulture	ReproInfo	ReproInfo	ReproSource	ReproSource
Source Data Field Name	IMAGE ID	ImagID	WORK TYPE	TITLE	CREATOR	ROLE	DATE	SITE	REPOSITORY	NATIONALITY		GENERAL CLASSIFICATION		SOURCE
Inlight VRA Model field name to populate	WorkID	ReproID	WorkType Description	WorkTitle Description	WorkCreator DisplayName	WorkCreator Role	WorkDate Display	WorkLocation Description	WorkRepository Name	WorkCulture Description	ReproID	ReproNotes	ReproSource Name	ReproSource Details
Preferred Order or Type Description value														
Field Display Name (if displayed)	Work Record ID	ImagID	Work Type	Title	Creator Name	Creator Role	Display Date	Location	Repository	Culture	ReproID	Repro Notes	ReproSource Name	Source
Value	00001	LUN2000	Painting	Painting Title	Adam Bee	Painter	after 1843	Culver City		Italy				
	00002	LUN2001	Painting	Painting Title	Adam Bee	Painter	1875-7 (?)	Culver City		Lithuanis	null		null	
	00003	LUN2002	Painting	Painting Title	Adam Bee	Painter	1875-7 (?)	Culver City		Lithuanis				
	00004	LUN2003	Painting	Painting Title	Adam Bee	Painter	1875-7 (?)	Culver City		Lithuanis				
	00005	LUN2004	Painting	Painting Title	Adam Bee	Painter	1875-7 (?)	Culver City		Lithuanis				
	00006	LUN2005	Painting	Painting Title	Adam Bee	Painter	1883	Culver City		France				
	00007	LUN2006	Painting	Painting Title	Adam Bee	Painter	1883	Culver City		France				
	00008	LUN2007	Painting	Painting Title	Adam Bee	Painter	1883	Culver City		France				
	00009	LUN2008	Painting	Painting Title	Adam Bee	Painter	1883	Culver City		France				
	00010	LUN2009	Painting	Painting Title	Adam Bee	Painter	1883	Culver City		France				