MANAGING A PROJECT FOR ART DOCUMENTATION OR VOCABULARY CREATION
Introduction to Art and Cultural Objects Documentation Management

Patricia Harpring
Managing Editor, Getty Vocabulary Program
Revised October 2017
Introduction

- Managing a project requires the consideration of several factors
  - The Project Plan
  - The Data
  - The System
  - Editorial Guidelines
  - Quality of Work
  - Reports
  - Staff
  - Working Environment
  - How to make a Presentation
PLANNING THE PROJECT

The first and most important step
Initial Analysis of Tasks

- **Project plan**
- **Understand the project**
- **Know what is required to accomplish the tasks**
  - What educational background is required?
  - What skills are required?
  - How long does each task take?
  - How many people are required to do the task?
  - What materials are required?
- **Do test runs of tasks**
- **Keep track of potential problems**
Project Plan

- Designing the project plan is the most important step
- Realistic project plan is critical

- Scope of project
- Financial resources
- Physical resources
- Human resources
- Time frame
- Schedule & milestones
- Criteria for judging results
Defining a Project Plan

- **Describe tasks**
- **Define deliverables**
- **Specify staff**
- **Set start and end dates**
- **Set work hours & regular staff meetings**
- **Analyze budget**
Analysis of Resources

- **What is the deadline?**
- **What are the available resources?**
  - Design a realistic work flow schedule
  - Allow for potential sick days, technical glitches
- **How much per week/month must be completed to meet the deadline?**
- **What compromises are acceptable in case you fall behind schedule?**
Other issues for project planning

- **How will data be updated, preserved, and transferred to new media?**
- **What will next 3- to 5-year phase of the project be?**
- **How to begin planning now for next phase?**
- **These are issues to address after first phase:**
  - Have initial goals and deliverables been met in the first phase?
  - What lessons have been learned?
Analysis of Resources

For a cataloging project

- **Gaining control of material**
- **Arrange project in phases**
- **Group-level cataloging?**
  - Large groups, small groups, item-level cataloging

Phase 1 = group
Phase 2 = box
Phase 3 = item
Arranging the Project in Phases

- E.g., translate section by section of the vocabulary, such as Facets of the AAT
- Alternatively, first translate the terms required by your project, then go back and translate the remaining vocabulary
ANALYZING THE OBJECTIVES

Determining the requirements
How to Ensure Access

• Editorial rules
• Consistency
• Standards & vocabularies
• Data structure
• Computer system
For a vocabulary translation or creation project

Use editorial rules

- **Follow guidelines for contributions**
- **See the rules in Contributing Large Translations**

[Image]

http://www.getty.edu/research/tools/vocabularies/guidelines/aat_4_4 Appendix D: Contributors and Contributions.html#4_4_2
For a vocabulary translation or creation project

Use editorial rules

- Follow editorial guidelines for AAT, TGN, ULAN, CONA, or the IA

http://www.getty.edu/research/tools/vocabularies/guidelines/index.html#aat
For a vocabulary translation or creation project

Use the editorial rules

- Include the “core” fields
- Use proper literary warrant
- Include preferred term in your target language
- If it is a new record, include an English term
- Include a scope note

http://www.getty.edu/research/tools/vocabularies/guidelines/index.html#aat

**ID**: 300132869

**Terms:**
- bobbin lace (pref, en)
- bone lace (en)
- cushion lace (en)
- 梭心蕾絲 (zh)
- 線軸編織花邊 (zh)
- kloskant (nl)
- dentelle aux fuseaux (fr)
- encaje de bolillos (es)
- encaje de bolillo (es)
- Klöppelspitze (de)
- Klöppelspitzen (de)

**Associative Relationships**

requires ... lace pillows (<textile fabricating tools and equipment>...Objects Facet) [300132869]

... Visual & Verbal Communication

..... Visual Works

...... visual works (works)

......... <visual works by material>

............... needlework (visual works)

................ lace (needlework)

................ bobbin lace

**Note:** With "needle lace," one of two primary types of handmade lace. It is characterized by being made by ...

**Chinese (traditional)** ..... 與「針織蕾絲」(needle lace)同為主要的手工蕾絲，其特色是以織繞於線軸或梭心...

**Dutch** ..... Een van de twee belangrijkste soorten met de hand vervaardigde kant; 'naaldkant' is ...

**German** ..... Zusammen mit der "Nadelspitze" eine der wichtigsten...

**Spanish** ..... Junto a "encaje a aguja", uno de los dos tipos principales de ...

**Contributors:** VP, CHIN, AS, RKD, IfM-SMB-PK, CDPB-DIBM

**Sources:** Earnshaw, Claburn, Needleworker's Dictionary (1976); Identification of Lace, 2d ed. (1984); Ginsburg, Illustrated History of Textiles (1991)
Quick Reference Guide

- Contact the Getty Vocabulary Program before beginning a translation project.
- Follow the guidelines in Harpring, Multilingual Equivalency and the AAT Editorial Guidelines.
- Organize all translations in one language as a project managed by the participating translating institutions.
- Assemble an expert team for translations, including experts in both a) the content and b) the source and target languages.
- Organize the work logically, either a) working facet by facet or b) using a two-step approach, by first mapping existing terminology in the target language back to the master AAT, and then proceeding with the remainder of the AAT translation.
- Safeguard the primary objectives of a) maintaining cross-language equivalence between the English descriptor and the target language descriptor, and b) maintaining monolingual equivalence between the descriptor, alternate descriptor, and used for terms in the target language for a given concept record.
- Undertake a term-to-term translation, maintaining the thesaural structure and associative relationships of the master AAT.
- Translate only the English descriptor or alternate descriptor in the master AAT; do not attempt to also translate the English used for terms.
- However, if in establishing the target-language descriptor, it is discovered that there are additional terms with true equivalence in the target language, they should be included as used for terms for that language.
- Terms within a given concept record must have true synonymy, including cross-language equivalences.
- Alternate descriptors must be derivatives of the descriptor for that language; terms that are not derivatives of the descriptor should be used for terms. Note that users of the AAT may choose any term in the concept record for indexing, including used for terms.
- Use loan terms if appropriate.
- Resort to coined terms and literal translations only when necessary.
- Submit records for new concepts, as necessary.
- Include qualifiers for all homographs, checking not only the target-language translation, but the full AAT, including terms in all languages.
- Provide warrant for all terms.
- Ensure that the translated term referenced in published sources in the target language has not only the same spelling, but also precisely the same meaning as defined in the scope note of the AAT concept record.
- Provide feedback and direct questions to the Getty’s AAT editorial team as necessary, regarding editorial rules, hierarchical placement, associative relationships, and scope notes; use the established channels.
- Regarding existing data in the master AAT, request only essential changes, since the impact of proposed changes must be considered and tracked for all languages.
- In consultation with the Getty technical team, send the contribution in batches using the prescribed XML format for contributions.
Examine existing standards
Local adaptations may be necessary
But be compliant where necessary for retrieval

For cataloging projects
Rely upon appropriate Standards & Vocabularies

Categories for the Description of Works of Art

1. Object/Work

   DEFINITION

   An identification of the type and number of works described.

   SUBCATEGORIES

   ▪ 1.1. Catalog Level Core
   ▪ 1.2. Object/Work Type Core
   ▪ 1.3. Object/Work Type Date
     ▪ 1.3.1. Earliest Date
     ▪ 1.3.2. Latest Date
   ▪ 1.4. Components/Parts
     ▪ 1.4.1. Components Quantity
     ▪ 1.4.2. Components Type
   ▪ 1.5. Remarks
   ▪ 1.6. Citations
     ▪ 1.6.1. Page
   ▪ Examples

   GENERAL DISCUSSION

   This category identifies the logical focus of discussion. It describes what there is possible to find works of a particular type and their components.

http://www.getty.edu/research/publications/electronic_publications/cdwa/


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For cataloging projects

Which are the “core” fields?

• What is a minimum record?
• Which fields are critical for retrieval?

Catalog Level: item
Title: Bronze Vase
Creator: Nakagawa, Kazumasa (Japanese ceramicist, 1893-1991)
Index: [ULAN 500122304]
Culture: Japanese
Classification: decorative arts
Work Type: vase [AAT 300132254]
Creation Date: Meiji period (1868-1912)
Material/Techn.: cast bronze
Index: bronze (metal) [AAT 300010957]
Dimensions:
height: 19.05 cm (7 1/2 inches)
Value: 19.05 Units: centimeters Type: height
Inscriptions: signed: Masatoshi saku
General Subject: utilitarian objects Type: isness
Specific Subject: carp [AAT 300250185]
Location: private collection
Descriptive Note: Relief with a swimming carp.
Traces of old labels; slight light marks to patina.
Variance in color of patina, including red and orange.
For cataloging projects
Rely upon appropriate Standards & Vocabularies

Catalog Level: item
Classification: prints and drawings
Work Type: print
Title: Shell (Murex brandaris)
Creator:
  Name: Wenceslaus Hollar
Dimensions: plate: .095 x .136 m  Date: ca. 1645
Location: National Gallery of Art (Washington, DC)
Repository Number: 1992.17.2  Credit Line: Gift of Edward William Carter and Hannah Locke Carter
Location: Bohemia  Type: creation
Material: etching on laid paper  Culture: Bohemian
General Subject: animals
Specific Subject: shell | Murex brandaris

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For cataloging projects

What data will be recorded?

- Consult CDWA and CCO for core & required fields
- What information is important for your project? Additional fields?
- What information is available for the objects?

**Classification:** photographs
**Work Type:** daguerreotype
**Title:** A young mother with her daughter
**Creator:** unknown 19th-century American
**Dimensions:** 4 1/4 x 6 1/2 in. (including case)
**Date:** 1850s
**Materials:** quarter-plate daguerreotype; leather case; red-velvet silk lining
**General Subject:** portrait
**Specific Subject:** double portrait | woman | child
**Descriptive Note:** Quarter-plate daguerreotype of a young mother, wearing a fancy plaid dress, and her daughter, both with gilt detail on their earrings and necklaces, without a seal, in a leather case.
**Current Location:** Fillmore Museum of Art (Filmore, Kansas)

**Condition:** There are some light tarnish spots, especially noticeable in the background, giving it a faintly mottled look. There is a small accretion in the lower left portion of the image on the mother’s dress, and another smaller one to the right of the young girl’s arm. There are two intertwining
For cataloging projects

What rules are required for various fields?

**Catalog Level:** item

**Classification:** prints  
**Work Type:** engraving

**Title:** François-Thomas von Savoyen, Prinz von Carignan

**Creator:** Thomas Sabaudus (printmaker 17th century), after Anthony Van Dyck (Flemish 1599-1641)

**Materials:** engraving, on wove paper

**Dimensions:** sheet: 465 x 362 mm

- **Value:** 465  
  - **Units:** millimeters  
  - **Type:** height

- **Value:** 362  
  - **Units:** millimeters  
  - **Type:** width

**General Subject:** portrait  | another work

**Specific Subject:** François-Thomas von Savoyen | single sitter portrait

**Location:** private collection

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**Methodology**

- e.g., How should staff measure the object? Do they measure and record in cm or inches?

**Content**

**Format**

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For cataloging projects

What rules are required for various fields?

Catalog Level: group
Classification: Tools & Implements
Work Type: arrowheads | kirk points
Title: Group of points from Bannerstone Site (20 MR 52)
Creator: unknown Archaic Native American (Great Lakes)
Dimensions: range from 6.4 x 2.1 x .7 cm to 3.6 x 3.8 x .35 cm (2 1/2 x 7/8 x 1/4 to 1 3/8 x 1 1/2 x 1/8 inches)
Date: Archaic period
Materials: flint | vitric tuff | rhyolite
Descriptive Note: 20MR51.02: Kirk point; vitric tuff; corner-notched stemmed; distal portion missing; 20MR51.02: Kirk? point; rhyolite; corner-notched and stemmed; not serrated; distal portion modified into a scraper
General Subject: utilitarian objects
Location: University of Michigan, Museum of Anthropology (Ann Arbor, Michigan)

• ARE THE RULES THE SAME FOR GROUPS AS FOR SINGLE ITEMS?

- e.g., record the range of measurements for the group, don’t measure every item
Catalog Level: item
Classification: decorative arts
Work Type: humidor
Creator: Theodore B. Starr company
Title: Copper and Silver Humidor
Dimensions: 301 x .227 m x .270 m
Date: created 1900/1924
Materials: copper, silver and brass. American silver = sterling grade = 925 silver/1000 metal
Descriptive Note: Theodore B. Starr was in business from 1900 to 1924. The company was then taken over by Reed & Barton. The rectangular hammered copper case mounted with silver whiplash stylized strapwork at the rims and corners continuing to scrolling strapwork feet, the cover mounted with a stylized possible monogram, the brass interior fitted with two side-by-side rectangular compartments, the interior edge with a slender central compartment, the sides pierced with stars.
Location: Fillmore Museum of Art (Fillmore, Kansas)
Is the information already approved by a team leader or authorized expert

If YES, enter in Subject field

If NO, is there an inscription stating the information?

If NO, compare subject to others in the series or to other related material. Can you make a certain identification?

If YES, enter in Subject field

If NO, enter “probably” or more general subject

If YES, is the inscription reliable? Is it inscribed in the plate of the print? Is it written by hand by the artist?

If NO, compare subject to others in the series or to other related material. Can you make a certain identification?

If YES, enter in Subject field

If NO, enter “probably” or more general subject

Subject: Identify geographic place, event (if any), named persons (if any), ethnic group or culture (if applicable)
**Subject:** Identify subject if known.
**What if uncertain?**
**If inscription lists place name**
  - If inscription is by photographer, record inscribed place name
  - If inscription is by later collector, try to find verification
**What are other places in series?** If of nearby places, list place name as inscribed

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**Classification:** Broadcasting and Recorded Sound Division
**Work Type:** photograph
**Creator:** unknown American
**Title:** Mansion belonging to Rita Pasquale’s uncle in Italy
**Dimensions:** 3 1/8 x 3 3/4 inches
**Date:** inscribed date: 1921
**Materials:** photograph
**General Subject:** cityscapes
**Specific Subject:** Passobreve (Piemonte, , Italy)
**Location:** Library of Congress (Washington, DC).
**Repository Number:** NV8-CF80-16
Decision Trees

Subject: Identify subject if known.

If specific tribe unknown
- Try to identify tribe by comparing other prints in the group
- If uncertain, list broader subject, "Native American"

Classification: Prints
Work Type: engraving
Creator: Design: Albert Bierstadt; engraver: James David Smillie
Title: inscribed: Rocky Mountains
Date: published ca. 1866
General Subject: landscapes
Specific Subject: landscape | Native Americans | Yosemite Valley (California)
Dimensions: 11 1/4 x 15 1/4 (sheet size) Materials: engraving
Descriptive Note: Native American encampment near lake in the
Repository Number: PGA - Yosemite Valley (California)
Location: Library of Congress (Washington, DC)
Broader Context: part of group: Indians of North America--1860-1870

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Classification: Prints & Drawings
Work Type: etching
Creator: Philibert-Louis Debucourt (French, 1755 – 1832)
Title: Menuet de la Mariée (The Minuet of the Bride)
Dimensions: image: .301 x .227 m (11 7/8 x 8 15/16 in.)
            sheet: .382 x .270 m (15 1/16 x 10 5/8 in.)
Date: 1786
Materials: etching and engraving printed in yellow, red, blue, pink, and black inks from five plates
General Subject: genre
Specific Subject: minuet, bride, wedding,

Descriptive Note: 

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SCOPE AND FORMAT OF THE DATA

Analyzing which data is needed and how it should be organized
What will be scope and format of data?

- **What will be the format of your data?**
- **Will you include images?**
- **For controlled values in your data, need methodology to keep your terminology in sync with the authoritative vocabulary (e.g., the master AAT)**
Accommodate required displays

- **Draft layouts**
  - How do you want to see your data?
  - Online for end-users
  - For print publications
  - For display and editorial tasks in a system
Entity Relationship Diagram

- GRAPHIC REPRESENTATION OF RELATIONSHIPS
- LOGICAL RELATIONSHIPS BETWEEN DATA

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The Data Dictionary

Database contains the following tables:

<table>
<thead>
<tr>
<th>Table</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>main</td>
<td>Main record for the object</td>
</tr>
<tr>
<td>creator</td>
<td>Artists</td>
</tr>
<tr>
<td>creator_detail</td>
<td>Information linked to artists</td>
</tr>
<tr>
<td>related_obj</td>
<td>Object related to this record</td>
</tr>
<tr>
<td>relatedobj_detail</td>
<td>Information linked to the related object</td>
</tr>
<tr>
<td>biblio</td>
<td>Bibliographic information</td>
</tr>
<tr>
<td>images</td>
<td>Images of this object</td>
</tr>
</tbody>
</table>

- What data do you need to record?
- How do you need to get data out?
- Flexibility
The Computer System

- Development Team
- Functionality
- Speed
- Efficiency
- User-Friendly
- Flexibility
- Ongoing Technical Support
The Computer System

- Your system should address your own needs
- Entering data, reviewing data, reports
- Whether a Collections Management system
- or Thesaurus Management system
The Computer System

- For example, the Getty VCS system is optimized to load contributed data, to merge duplicates, and to publish the merged dataset.
- Not a good system for translators or those with the primary goal of creating new concept records.
- However, some features of VCS may overlap with the requirements of a more standard thesaurus management system.
- Also, VCS is 10 years old and due to be replaced by a newer system.
- For creating a thesaurus and translating, it is better to consider systems used by other translating projects.
- Utilizing the data structure of VCS may be a good idea for contributors.
- Views of the data may overlap.
### Hierarchical view

<table>
<thead>
<tr>
<th>Stat</th>
<th>Mark</th>
<th>Descriptor (Qualifier)</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>FN</td>
<td></td>
<td>Top of the AAT hierarchies</td>
<td>30000000</td>
</tr>
<tr>
<td>IP</td>
<td>+</td>
<td>Materials facet</td>
<td>300264091</td>
</tr>
<tr>
<td>IP</td>
<td>+</td>
<td>Materials (hierarchy name)</td>
<td>300010357</td>
</tr>
<tr>
<td>IP</td>
<td>+</td>
<td>materials (matter)</td>
<td>300010358</td>
</tr>
<tr>
<td>IP</td>
<td>+</td>
<td>&lt;materials by composition&gt;</td>
<td>300212863</td>
</tr>
<tr>
<td>RV</td>
<td>+</td>
<td>inorganic material</td>
<td>300010360</td>
</tr>
<tr>
<td>NW</td>
<td></td>
<td>arenite (mineral)</td>
<td>300400863</td>
</tr>
<tr>
<td>IP</td>
<td></td>
<td>alun</td>
<td>300143321</td>
</tr>
<tr>
<td>IP</td>
<td></td>
<td>aluminum silicate</td>
<td>300250845</td>
</tr>
<tr>
<td>AC</td>
<td></td>
<td>arsinite</td>
<td>300380482</td>
</tr>
<tr>
<td>IP</td>
<td></td>
<td>ankerite</td>
<td>300303035</td>
</tr>
<tr>
<td>IP</td>
<td></td>
<td>apatite</td>
<td>30011070</td>
</tr>
<tr>
<td>RV</td>
<td></td>
<td>aragonite</td>
<td>300380466</td>
</tr>
<tr>
<td>RV</td>
<td></td>
<td>arsenopyrite</td>
<td>300385655</td>
</tr>
<tr>
<td>IP</td>
<td>+</td>
<td>asbestos</td>
<td>30001071</td>
</tr>
<tr>
<td>IP</td>
<td></td>
<td>azurite (mineral)</td>
<td>300266450</td>
</tr>
<tr>
<td>RV</td>
<td></td>
<td>baryte</td>
<td>300013788</td>
</tr>
<tr>
<td>RV</td>
<td></td>
<td>barbotite</td>
<td>300388566</td>
</tr>
<tr>
<td>NW</td>
<td></td>
<td>bauxite</td>
<td>300387544</td>
</tr>
<tr>
<td>IP</td>
<td>+</td>
<td>beryl</td>
<td>300011072</td>
</tr>
<tr>
<td>IP</td>
<td></td>
<td>bindnerite</td>
<td>300037550</td>
</tr>
<tr>
<td>NW</td>
<td></td>
<td>borac</td>
<td>300011077</td>
</tr>
<tr>
<td>NW</td>
<td></td>
<td>botallackite (mineral)</td>
<td>3004008910</td>
</tr>
<tr>
<td>NW</td>
<td></td>
<td>calamine (natural mineral admixture)</td>
<td>300400565</td>
</tr>
<tr>
<td>IP</td>
<td>+</td>
<td>calcite</td>
<td>300011078</td>
</tr>
<tr>
<td>AG</td>
<td>+</td>
<td>calcium oxide</td>
<td>300379654</td>
</tr>
<tr>
<td>RV</td>
<td></td>
<td>calcium propionate</td>
<td>300386422</td>
</tr>
<tr>
<td>RV</td>
<td></td>
<td>calcium silicate</td>
<td>300386591</td>
</tr>
<tr>
<td>RV</td>
<td></td>
<td>calcite</td>
<td>300386583</td>
</tr>
</tbody>
</table>

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THE EDITORIAL PROCESS

Accomplishing editorial goals with the right team
The Staff

- Recruit the right people
- Correct skills & education for the job
  - experience
  - knowledge of material
  - foreign languages
  - graduate degree
  - computer skills
  - good analytical skills
- Right temperament for job
  - meticulous
  - patient
  - reliable
  - will take the initiative
  - can meet deadlines
  - can make decisions
  - good team player
- Have a probationary period
The Environment

- Provide good working environment
- Ergonomics
  - chair
  - keyboard pad
  - correct mouse
  - foot rest
  - lights
  - stands
  - headset
  - location
The Environment

- **Materials**
  - hardware
  - software
  - Web access for appropriate sources (subscriptions)
  - reference books
  - journals, newspapers
  - maps
  - files
  - magnifying glasses
  - office supplies
Editorial Guidelines

- Provide written editorial guidelines
  - based on CCO and CDWA
  - or the Getty Vocabulary Guidelines
  - well organized
  - present information in various levels
    - overview
    - specific details
  - information in the guidelines should be easily accessible
  - explain any discipline-specific or technical terminology

- Provide general overview of principles
  - e.g., what is scope of project
  - what fields are “core” or required

- Provide concise outline of data
  - list of fields
  - definitions
  - which are required
  - examples
I. EDITORIAL RULES

A. CREATORS NAMES

EXCEPTIONS:
Kalf, Willem
Willem Kalf
Burgkmair, Hans the Elder
Hans Burgumair the Elder
Pontormo
Pierre-Antoine MS00eraud pS02ere
Rembrandt Harmensz. van Rijn
Katsushika Hokusai
Kicking Bear
Limbourg Brothers
Gilbert & George

Office of William Talman
McKim, Mead and White
Feature Animation
Disney Studios
The Walt Disney Company
Associated American Artists
Master of the Dido Panels
Monogrammist ELA
Achilles Painter
Borden Limner
unknown Mayan

1. General information about names.
   a) You should use the preferred name in ULAN. If the name is not in ULAN, create a record for the artist in the Artist Authority.
   b) “Names” for artists include the names, appellations, or other identifying phrases assigned to an individual or corporate body.
   c) All names must be in the Roman alphabet.
   d) Diacritical marks should be indicated by using the diacritical codes in Appendix A.
   e) Names and other information should be expressed in mixed case (i.e., not in upper case).
   f) An individual preferred name field or alternate name field should NOT contain multiple names.
      (1) For example, rather than expressing a preferred name as Masaccio (Tommaso di ser Giovanni di Mone Guidi), these two name forms should be recorded as two different names. You might choose Masaccio as the preferred name (it is a nickname, but is the more common name in art historical literature), and Tommaso di ser Giovanni di Mone Guidi (the artist’s full name) as an alternate name.
    
   g) Sources for artists’ names include biographical dictionaries, encyclopedias and other standard reference books on art and artists, monographs, journal articles, signatures on art objects, archives and other unpublished sources.
Updating Editorial Guidelines

- Provide method for collecting issues and resolutions
- Transfer resolutions to full set of Guidelines periodically
- Available online and printable as necessary
Background Materials

- Provide necessary supplementary and reference information
- Make it easily accessible

6.4 How does one convert a Republican date to a Gregorian one?

The following table lists the Gregorian date on which each year of the Republican started:

<table>
<thead>
<tr>
<th>Year</th>
<th>Republican Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>22 Sep 1792</td>
</tr>
<tr>
<td>2</td>
<td>22 Sep 1793</td>
</tr>
<tr>
<td>3</td>
<td>22 Sep 1794</td>
</tr>
<tr>
<td>4</td>
<td>23 Sep 1795</td>
</tr>
<tr>
<td>5</td>
<td>22 Sep 1796</td>
</tr>
<tr>
<td>6</td>
<td>22 Sep 1797</td>
</tr>
<tr>
<td>7</td>
<td>23 Sep 1798</td>
</tr>
<tr>
<td>8</td>
<td>23 Sep 1799</td>
</tr>
<tr>
<td>9</td>
<td>23 Sep 1800</td>
</tr>
<tr>
<td>10</td>
<td>23 Sep 1801</td>
</tr>
<tr>
<td>11</td>
<td>23 Sep 1802</td>
</tr>
<tr>
<td>12</td>
<td>24 Sep 1803</td>
</tr>
<tr>
<td>13</td>
<td>23 Sep 1804</td>
</tr>
<tr>
<td>14</td>
<td>23 Sep 1805</td>
</tr>
</tbody>
</table>
Training and procedures

- **Provide good training**
- **How to use the computer system**
- **What are the procedures for tasks**
- **How to apply editorial rules**
- **How to spot issues and problems**
- **What to do about issues and problems**
- **Update training as necessary**

- **Provide written procedures documenting editorial system**
- **Steps to take in creating or editing a record**
- **And other functions**
- **E.g., running reports**
Supervision

- One highly qualified person who oversees all of the editorial/documentation work
- To ensure quality
  - Does record contain all of the required fields?
  - Is information derived from authorized source and correct?
- To manage workflow
  - Are we meeting our milestones on time?
  - What should we eliminate or streamline in order to get back on schedule?
Maintaining Quality

- Check their work
- Thoroughly following training
- Spot checks thereafter
- Provide way for them to check own work
- Team new editor with an experienced editor

- Provide incentives
- Combine constructive criticism with praise
- Alternate tedious tasks with more interesting ones
- Editorial meetings
- Encourage team spirit
- Friendly competition
Managing Time

- How to realistically deal with TIME
- What constitutes an acceptable basic record ("core" fields)
- How to choose or prioritize which records/items should have fuller records
  - e.g., most important or valuable items should have fullest records
Quotas

- Estimate quotas necessary to meet goal
- Flexibility
  - e.g., if number of records completed is 100 per week per cataloger
  - average = three records per hour
  - rely on average over the week, a worker could spend 2 minutes on some records and 2 hours on others
  - as long as they were all accurate and followed the guidelines and he or she did the required number for the particular time period
Sample quotas for Vocabulary Program tasks

Note how the average per day over a week is key

Totals vary, depending upon the difficulty of the data

---

**Quota goals for Vocabulary Program tasks 2015**

**AAT Tasks**
- **New Records**: average = 10 / day [new research required]
- **Scope Notes**: average = 15 / day
- **Other Edits**: average = 25 / day [could vary greatly, depending what is edited]

**ULAN Tasks**
- **New Records**: average = 20 / day
- **Merging**: average = 120 / day [fewer if research is required]
- **Other Edits**: average = 25 / day [could vary greatly, depending what is edited]

**TGN Tasks**
- **New Records**: average = 20 / day
- **Editing Records**: average = 25 / day [could vary greatly, depending what is edited]
- **Check Nations’ Subdivisions**: average = 5 / day [fewer, if overhaul required]
- **Moving**: average = 100 / day

**CONA Tasks**
- **New Records**: average = 25 / day [source material from repository]
- **New Records**: average = 12 / day [new research required]
- **Other Edits**: average = 25 / day [could vary greatly, depending what is edited]

**IA Tasks**
- **New Records**: average = 25 / day [new research required, minimal record]
- **Other Edits**: average = 25 / day [could vary greatly, depending what is edited]
RETRIEVING THE DATA

The critical importance of good reports
Reports

- Good reports are critical for success
- to track statistics
- to document progress
- for editors to check their own work
- for supervisor to check all work
- to check accuracy of data
- to produce outputs for publication
Statistical reports for data quality and measuring progress

Reports

- Monthly record count by editor
- Reports are run automatically
- May provide friendly competition

<table>
<thead>
<tr>
<th>TOTAL LEFT TO DO</th>
</tr>
</thead>
<tbody>
<tr>
<td>62369</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EDITED RECS THIS MONTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>10613</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EDITOR NAME</th>
<th>EDITED RECS</th>
</tr>
</thead>
<tbody>
<tr>
<td>kimberly</td>
<td>1418</td>
</tr>
<tr>
<td>laila</td>
<td>1921</td>
</tr>
<tr>
<td>mali</td>
<td>1920</td>
</tr>
<tr>
<td>michelle</td>
<td>56</td>
</tr>
<tr>
<td>nanda</td>
<td>1706</td>
</tr>
<tr>
<td>Shelley</td>
<td>1626</td>
</tr>
</tbody>
</table>
### Graphic progress report by number of total records finished
- track schedule
- also good for morale

#### Statistical reports for data quality and measuring progress

<table>
<thead>
<tr>
<th></th>
<th>Jan (19 days)</th>
<th>Feb (17 days)</th>
<th>Mar (21 day)</th>
<th>Apr (20 days)</th>
<th>May (18 days)</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>European Ptq</strong></td>
<td>80</td>
<td>63</td>
<td>28</td>
<td>96</td>
<td>101</td>
<td>105</td>
</tr>
<tr>
<td><strong>Shards</strong></td>
<td>2488</td>
<td>4284</td>
<td>4058</td>
<td>4884</td>
<td>5996</td>
<td>3941</td>
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<tr>
<td><strong>Rare Books</strong></td>
<td>217</td>
<td>74</td>
<td>71</td>
<td>144</td>
<td>143</td>
<td>203</td>
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<td><strong>Total Edited</strong></td>
<td>2785</td>
<td>4421</td>
<td>4157</td>
<td>5124</td>
<td>6240</td>
<td>4249</td>
</tr>
</tbody>
</table>

**Edits done: 20000**
Statistical reports for data quality and measuring progress

Reports

- Detailed progress chart
- What portions of database are completed
- What portions are unfinished
- Dates of completion
- Which editors/catalogers completed which portions
Reports

- Overview of progress
- by larger section of database
- in pie chart

Statistical reports for data quality and measuring progress

<table>
<thead>
<tr>
<th>Print processed: By Curatorial Geog. Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finished: 76%</td>
</tr>
</tbody>
</table>

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October 2017
Reports

- Overview of progress
- Candidates and processed "non-candidates"

Statistical reports for data quality and measuring progress

<table>
<thead>
<tr>
<th>Log of Data Loads as of September 2015</th>
<th>Contributor</th>
<th>Contribution</th>
<th>Total number</th>
<th>Total auto-merged</th>
<th>Inserted as</th>
<th>VOS processing notes</th>
<th>CIGA Processor notes</th>
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</thead>
<tbody>
<tr>
<td>ULAN</td>
<td>Witt Library</td>
<td>artists</td>
<td>64652</td>
<td>18176</td>
<td>in process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jun-08</td>
<td>Avery Index</td>
<td>architects &amp; firms</td>
<td>89115</td>
<td>18176</td>
<td>do soon</td>
<td>processed</td>
<td></td>
</tr>
<tr>
<td>Jun-10</td>
<td>Provenance Index</td>
<td>artists</td>
<td>5285</td>
<td>1444</td>
<td>in process</td>
<td></td>
<td></td>
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<tr>
<td>Sep-10</td>
<td>Fine Arts Lib, I. U</td>
<td>repositories</td>
<td>12239</td>
<td>0</td>
<td>in process</td>
<td></td>
<td></td>
</tr>
<tr>
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<td>Grove Art</td>
<td>artists</td>
<td>16604</td>
<td>10930</td>
<td>in process</td>
<td></td>
<td></td>
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<tr>
<td>Feb-11</td>
<td>GRIL Library</td>
<td>artists</td>
<td>12860</td>
<td>6322</td>
<td>in process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mar-11</td>
<td>GRIL Spec Coll</td>
<td>artists</td>
<td>3057</td>
<td>71</td>
<td>next to do</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apr-12</td>
<td>ARTstor</td>
<td>artists &amp; repositories</td>
<td>7,071</td>
<td>0</td>
<td>pending processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jun-12</td>
<td>GRILC</td>
<td>stub records</td>
<td>407</td>
<td>407</td>
<td>pending processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jul-12</td>
<td>GRILC</td>
<td>stub records</td>
<td>406</td>
<td>406</td>
<td>pending processing</td>
<td></td>
<td></td>
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<tr>
<td>Aug-12</td>
<td>JPSM</td>
<td>stub records</td>
<td>175</td>
<td>176</td>
<td>pending processing</td>
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<tr>
<td>Sep-12</td>
<td>JPSM</td>
<td>stub records</td>
<td>160</td>
<td>160</td>
<td>pending processing</td>
<td></td>
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<tr>
<td>Sep-13</td>
<td>Provenance Index</td>
<td>owners</td>
<td>12,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sep-14</td>
<td>Provenance Index</td>
<td>artists</td>
<td>2,433</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
For other needs
To document usage
Statistical reports for data quality and measuring progress

- For other needs
- To document usage

**Reports**

<table>
<thead>
<tr>
<th>Downloads (Top 10)</th>
<th>Full list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Downloads: 9</td>
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<tr>
<td>Hits</td>
<td>206 Hits</td>
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<td>6</td>
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<tr>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>0</td>
</tr>
</tbody>
</table>

**GLOBAL AAT USE - October 2015**
Reports to display and export the data

**Reports**

**Full Record Report for Object:**
1911.173.1

*Work Type:* sculpture  
*Title:* Adam  
*Material:* bronze  
*Dimensions:* 193.7 cm  
*Creator:* Auguste Rodin  
*Nationality:* French  
*Dates:* 1840-1917

*Date:* cast by the artist in 1910 or 1911, from model of 1880  
*Original Site:* France  
*Natly/Culture:* French

*Notes:* Figure represents Adam being first roused to life, and makes obvious references to the scene by Michelangelo in the Sistine Chapel; design was originally intended for Rodin’s Gates of Hell

- Output is full record
- Generated by various criteria
- Editor
- Dates
- Where given combinations of fields contain values within given ranges
- Many other standard reports
- Linked to user-friendly report writer

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Reports to display and export the data

### Hierarchical Group Report: Group 7000019373

**Sorted by:** date of execution

<table>
<thead>
<tr>
<th>Group</th>
<th>Title</th>
<th>Date</th>
<th>Object ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Photographs from the Louis Catman collection</td>
<td>7000019372</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Landscapes Group</td>
<td>7000376433</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Snow Scene, Kámiros (1965)</td>
<td>7000008921</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Autumn Foliage Number 5, Linden (1966)</td>
<td>7000098220</td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>Mountain Landscape, Markus (1966)</td>
<td>1000989347</td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>Cabin in the Woods, New Hampshire (1967)</td>
<td>1000002678</td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>Village, Arkhangélos (1967)</td>
<td>5000093447</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Village, Arnithi (1967)</td>
<td>5000000984</td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>Western Sunset, Arizona (1967)</td>
<td>7000004534</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>Sunset, Pacific Ocean (1968)</td>
<td>10000003796</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>Snow Scene, Denver (1970)</td>
<td>10000003987</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Portraits Group</td>
<td>70000027462</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>Mother and Child (Dora) (1960)</td>
<td>70000037222</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Girl Reading (Joey) (1961)</td>
<td>70000000273</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>Girl and Her Doll (Triánda) (1963)</td>
<td>10000037873</td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>Grandfather (Petros) (1963)</td>
<td>10000002746</td>
<td></td>
</tr>
</tbody>
</table>

- **Output is another important view**
- **e.g., hierarchical view based on various criteria**
### Customized output
- Generated by various criteria
- e.g., check for errors in diacritics, for invalid dates

---

#### Report to search for all records with a value in the “Style” field, where the date of execution falls outside the date delimiters for the given style

**Style Value:** Renaissance  
**Date Delimiters:** $> 1350; < 1600$

<table>
<thead>
<tr>
<th>Key</th>
<th>Artist</th>
<th>Title</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>5002893</td>
<td>Anguissola, Sofonisba</td>
<td>Two Children</td>
<td>[empty]</td>
</tr>
<tr>
<td>7006329</td>
<td>Bronzino (circle of)</td>
<td>Portrait of a Duke</td>
<td>ca. 1646</td>
</tr>
<tr>
<td>4007418</td>
<td>Lorrain, Claude</td>
<td>Seascapes</td>
<td>ca. 1645</td>
</tr>
<tr>
<td>5002926</td>
<td>Lorrain, Claude</td>
<td>San Domenico</td>
<td>1648</td>
</tr>
<tr>
<td>7009080</td>
<td>Poussin, Nicolas</td>
<td>Landscape with Ruins</td>
<td>1650</td>
</tr>
<tr>
<td>1109344</td>
<td>Sansovino, Jacopo</td>
<td>Study for a Colonade</td>
<td>[empty]</td>
</tr>
<tr>
<td>4009921</td>
<td>Sansovino, Jacopo</td>
<td>Elevation, La Zecca</td>
<td>[empty]</td>
</tr>
</tbody>
</table>

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Reports

- User-friendly report writer for ad hoc reports
- create your own outputs
- linked to standard outputs
- linked to editorial system

New Reports   Existing Reports
SQL           VQL

Use Tables: obj_hier   obj_name

```sql
select object_key, pref_name
where obj_hier.geog_key = obj_name.object_key
  and pref_name like "[A-a]lmo%"
  and create_date > 12/12/07
sort by sort_name
```
Reports to display and export the data

- Allow some users of system to make reports directly on the data
- In this example, subject_ids in the results are then available as a list for editing
Reports to display and export the data

**Reports**

- Outputs for release formats and special requirements
  - e.g., Web release, XML, wall labels, catalog publications, loans

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HOW TO MAKE A PRESENTATION

Communicating the project and your achievements
How to make an effective presentation

- Part of managing a project is communicating success and accomplishments
- The following guidelines apply to any presentation, not only in the context of project management

Consider what you are trying to convey
- Have goals and an end point
- Have a beginning, middle, and end: Introduction and statement of premise, building the case, conclusion and next steps
How to make an effective presentation

Should be Dynamic

- How many slides? The number of slides determined by the following factors.
- Make the presentation suit your personality. Are you serious and professional? Or are you able to be vivacious and extemporaneous?
- Presentation must be dynamic. Use images, build visual effects by animation or slide transitions. 2 slides per minute average.
- Vary the pace. Some slides used for visual effect may be on screen for just a few seconds, others should remain on screen for longer as you speak.
- Dynamic speaker? If so, you can use fewer slides. 1 every minute or two minutes. If you are comfortable with it, mention a few people in the audience by name, ask questions that require audience participation.
- Do not speak in a monotone, use voice inflection to make points.
- Do not speak too fast, but do not speak too slowly.

- Practice, practice, practice: Feel completely comfortable with the material so to avoid awkward moments on stage
- Make eye contact, or at minimum look out into the audience
How to make an effective presentation

What to avoid

 Do not put up slides and go through bullet by bullet
 Do not put up a static image or Web page and talk about it
 Do not use distracting slide transitions and animations; cover, uncover, wipe, split are recommended

 Make the presentation suit the material
 Must the audience comprehend complex procedures, financials, facts? Then use a slow pace and convey points clearly
 Or must the audience be convinced of a point or go away with a general impression of the material? Then use a faster, entertaining pace

 Do not read from a script, unless you must
 Make each slide self-explanatory so that it can stand alone in a printout of the slides
 Do not speak every word on the slide. Often the slide may have information stated differently than you state it verbally, or there may be additional information on the slide to allow the slide show to be self explanatory without your spoken presentation
How to make an effective presentation

Physical materials for the audience
- Make slides available online; inform the audience at the outset that they should not try to take notes, but instead sit back and learn
- Exception: If your audience are not native speakers of the language of the presentation, give them a slide handout with room to take notes
- If you do not handout the presentation, make available a simplified handout with major points, URLs, etc. Give them the Web address of the full presentation online.
- If the audience is not a native speaker of the language, or if they are not expert in the topic you are presenting, speak more slowly
- Do not use jargon or idiomatic language
- Video presentations should follow similar guidelines. However, it is often more advantageous to use slides, so the audience can interrupt and ask questions as they come up. You can change your focus and level of detail on the fly, as you determine if the level of your audience's understanding is greater or less than you anticipated
CONCLUSION

Achieving success
Conclusion

**Check list**

- **GOOD DATA STRUCTURE, INCORPORATING CONTROLLED VOCABULARIES**
- **AN EASY TO USE, EFFICIENT, FAST, RELIABLE COMPUTER SYSTEM AND TECHNICAL SUPPORT**
- **GOOD REPORTS**
- **A CONSCIENTIOUS, DEDICATED STAFF**
- **A PLEASANT, EFFICIENT, COMFORTABLE WORKING ENVIRONMENT**
- **PROVIDE CLEAR AND ACCESSIBLE RULES BASED ON CDWA/CCO OR GETTY VOCABULARY GUIDELINES**
- **COMPETENT SUPERVISION**
- **EFFECTIVE PRESENTATION OF PROJECT AND ITS RESULTS**