PAHMA webapps: the missing manual

D R A F T
21 July 2014 jbl, mtb

Introduction

The webapps are a suite of browser-based tools which access the CollectionSpace database to provide critical functionality not provided by the "regular" interface.

In general, the webapps operate on *sets of records*, a set being defined as something like "all objects in a range of Museum numbers", e.g., "1-100 to 1-105a", or "all objects in a location or sequence of locations" (e.g. "Kroeber 51A, 500, 13" to "Kroeber 51A, 500, 23"). Typical operations performed are updating the data for sets of records, or creating move or inventory actions for them.

Besides move and data update operations, a few other webapps provide a means to print barcodes and view database content (e.g., authority hierarchies) in useful ways.

There are four classes of webapps in use at PAHMA:

1. Procedural webapps, which move objects and crates to other locations; and support upload media.
2. Data update webapps, which update data elements in (mostly collectionobject) records.
3. Reporting webapps, which return information about the collection (and do not change any data).
4. Barcode webapps, which support the scanning and printing of barcode labels.

Procedural webapps

- Systematic Inventory
- Move Object Range
- Crate Move
- Bulk Media Upload

Data update webapps

- Key Information Review
- Object Info Review
- Object Details
- Bulk Object Edit

Reporting webapps

- Packing List Report
- Hierarchy Viewer
- Collection Stats
- Government Holdings
- iReports Viewer

Barcode webapps

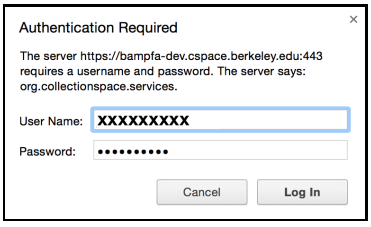
- Barcode Scan File Upload
- Barcode Label Generator

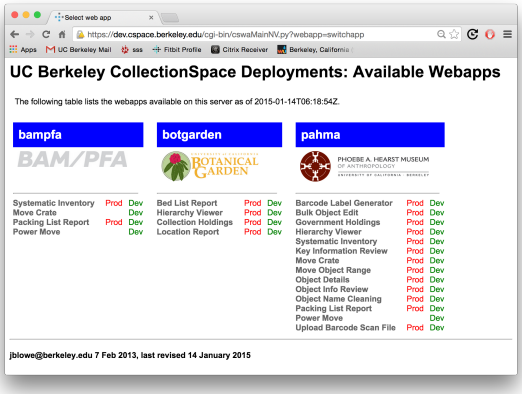
Don't forget to read up on the gotchas! to be found in these webapps.

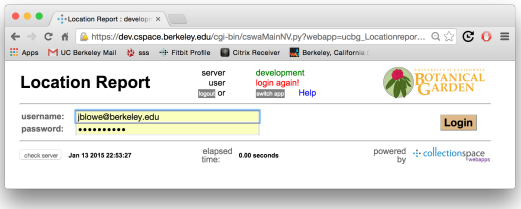
Getting to the Webapps

Logging in

- Visit: https://dev.cspace.berkeley.edu/cgi-bin/cswaMainNV.py
- You will need login in two steps:
- First, you will see an *Authentication Required* dialog box like the one shown above right. Login using the "shared page protection login/password." (I.e. there is a single, common login and password that everyone uses to get to the starting page. Ask around if you don't know it.
- Now you should see the "landing page" at right, showing the various webapps that are available.
- Green indicates a Development webapp: Harmless! Feel free to play around and experiment!
- Red indicates a Production webapp: Do real work here.
- Clicking on one of the colored links will bring you to the desired webapp as shown below at right. Now, login with your own CSpace credentials.
- ...And begin to enjoy using the webapps!



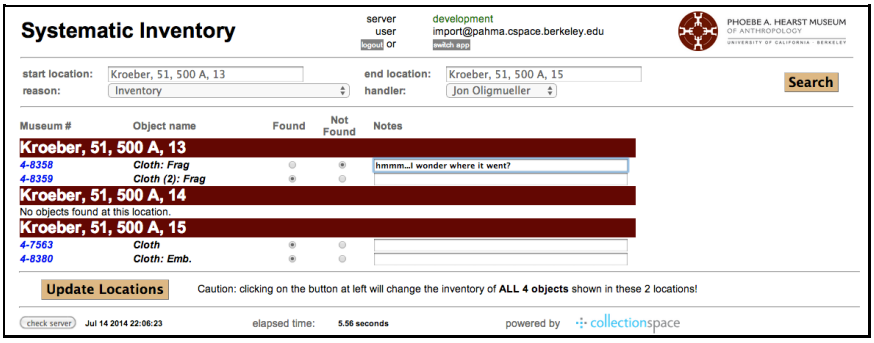




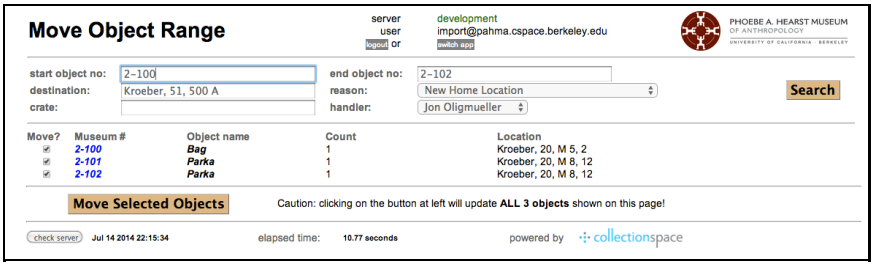
Short Description of Each Webapp

A screenshot of each of these is provided below with a short description of its operation.

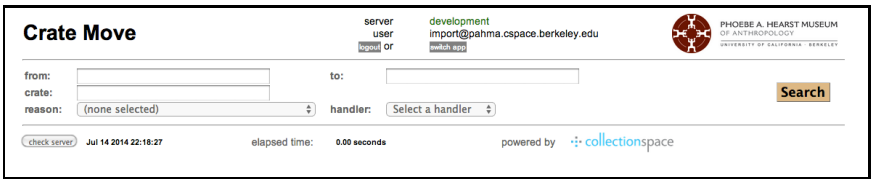
1. Producedural Webapps



This webapp allows registrars to reconcile the results of a (normally physical) inventory. User enters a *range* of storage locations and the objects in those locations are displayed; the user can then indicate (using the radio buttons) whether the object is indeed located or not. Other reports or the regular UI can be used to follow up on the objects that were not located. [*NB: There is a printed "Systematic Inventory" PDF report, generated by iReport, that can be used alongside this webapp. The Systematic Inventory webapp is essentially an editable version of this PDF report. Data entry can be done quite quickly, in large part due to the close similarity of the two documents.*]

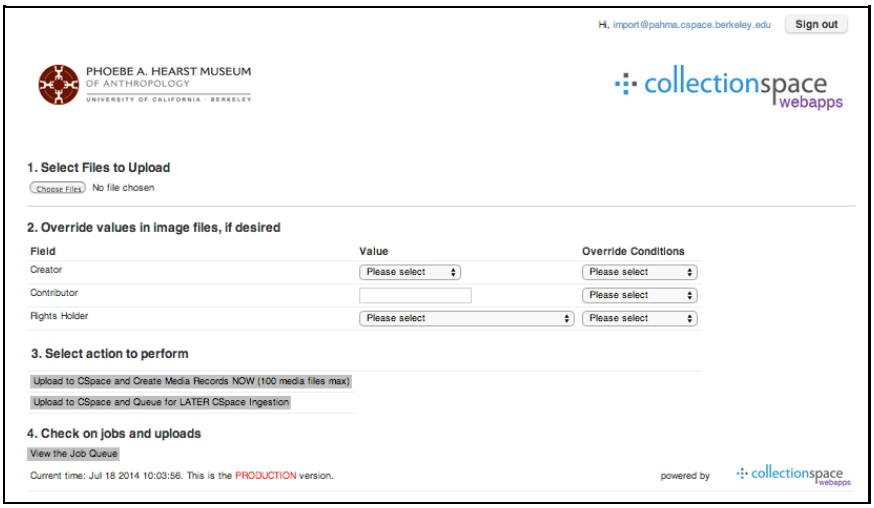


This webapp allows registrars, collections managers, and conservators to record the movement of a specific range of Museum numbers to a new storage location (and a new crate, if so desired). Once the user has entered a range of Museum numbers, a new destination/storage location, a reason, and a handler and clicked "Search", all objects in that range of Museum numbers are displayed, along with their object names, counts, and current locations. The user can choose to exclude any objects in this range from the move by deselecting those objects using the provided checkboxes. Once "Move Selected Objects" is clicked, all non-excluded displayed objects will be recorded as having been moved to the new storage location.

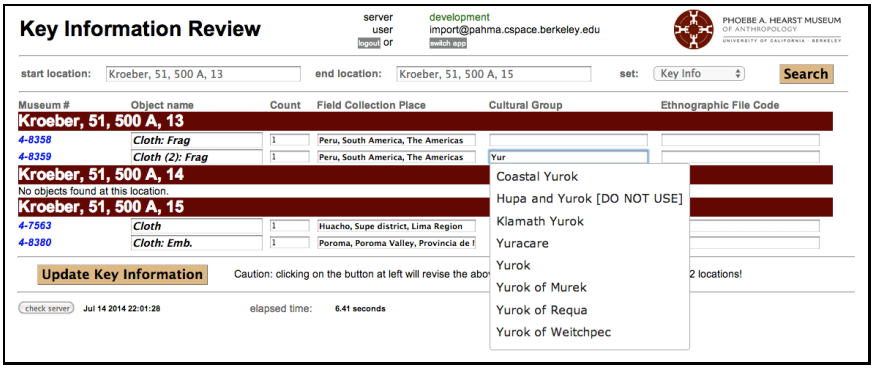


This webapp allows registrars, collections managers, and conservators to record the movement of a box or other container—and all of its contained objects—to a new storage location. The user must specify the box, crate, or container name, its current storage location, and the desired new storage location. The user can choose to exclude any objects from the planned move (for instance, if objects were removed just prior to the planned move) by selecting the "Not Found" radio button. Once "Move Objects" is clicked, all displayed objects not marked as "Not Found" will be recorded as having been moved to the new storage location, while remaining in their current box. Objects marked as "Not Found" will have their new location set to "Not Found," and will have to have their actual current location manually set in the CSpace UI. This webapp can also be used to inventory the contents of a box or crate, as it performs the same functionality as the Systematic Inventory webapp, but allows selection of a single box, rather than all boxes and all objects at a specific location.

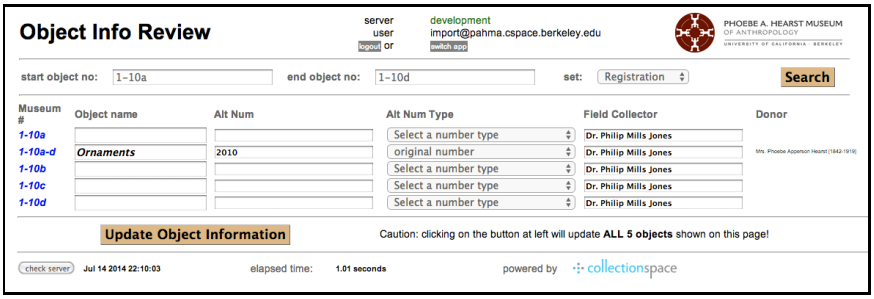
This webapp uploads media files (usually images) to CollectionSpace. The user selects a set of files on their local computer (using the "Choose Files" button) and then uploads these to the CSpace server. They are then "ingested" into CSpace via a nightly import job. There is an option to perform the ingestion process online, but since the process is slow -- several seconds at least per image -- the usual practice is to use the nightly batch option.



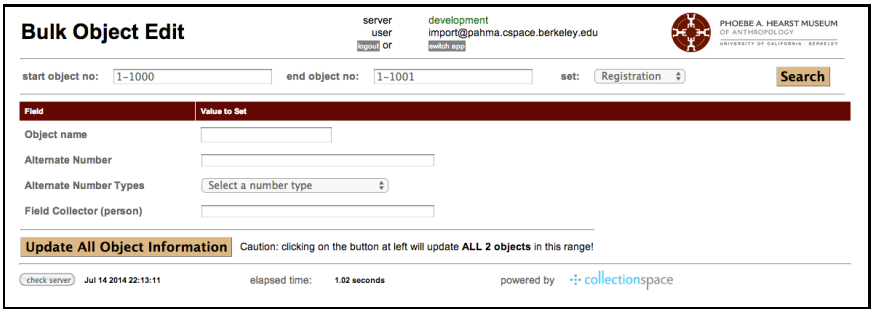
2. Data Update Webapps



This webapp allows registrars, curators, and subject matter experts to quickly verify, edit, and/or update values in several important fields (the so-called "key information fields"). The objects displayed in the KIR webapp are selected according to their storage location(s). Depending on the application (e.g., NAGPRA, physical inventory, retrospective cataloging), the identity of these key fields can vary, so the webapp accommodates different sets of—and configurations of—data fields. In most cases these are editable, but for some (e.g., Donor), the KIR webapp serves as a way to quickly determine the state of data entry and to identify particular records that need to be updated in the CSpace UI.

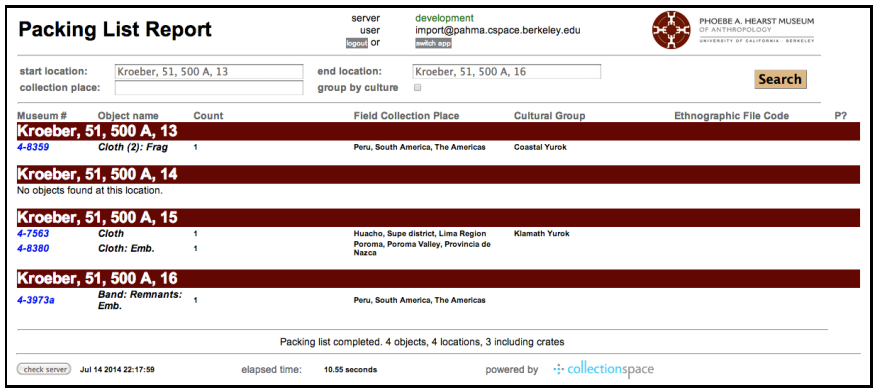


As with the KIR webapp, the OIR webapp allows registrars, curators, and subject matter experts to quickly verify, edit, and/or update values in several important fields. The sets of "Key Information" fields are the same as in the KIR webapp. The only difference between KIR and OIR is that in the OIR webapp, a range of Museum numbers is used to select the objects (instead of a range of storage locations).

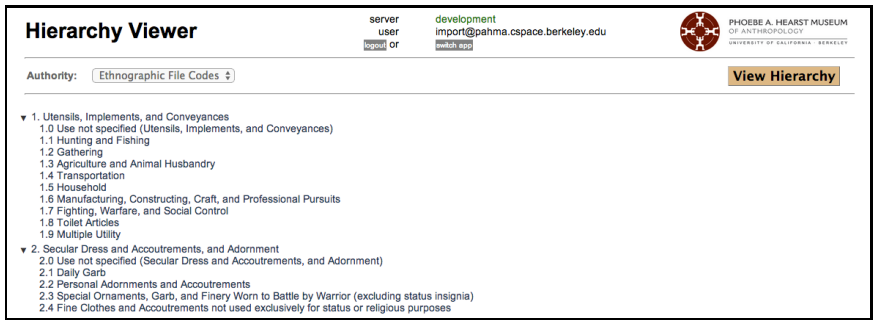


As with the KIR and OIR webapps, the BOE webapp allows registrars, curators, and subject matter experts to quickly update values in several important fields. The sets of available "Key Information" fields are the same as in the KIR and the OIR webapps. The BOE webapp differs in one very important aspect from either KIR or OIR: the values in the fields to be updated are not displayed by the BOE webapp. The user must know in advance what the existing values of these fields are, and must also be certain that they want to override all values in a particular field with a single value that the user can enter into each field. The user can update several fields at once, or only a single field at a time.

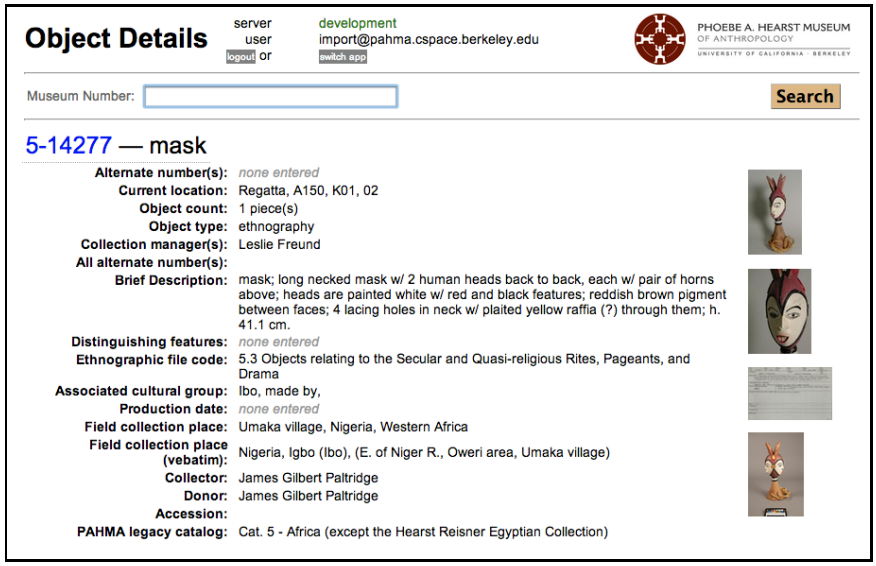
3. Reporting Webapps



This webapp produces both packing lists and decanting lists, and offers PDF and CSV options for both. For packing lists, a range of storage locations is entered, and a list of all objects at those locations is generated, grouped by current storage location. To restrict this list to objects from a certain place or continent, a collection place can be specified. To produce decanting lists that facilitate organizing objects by cultural group, the user need only check the "group by culture" checkbox.

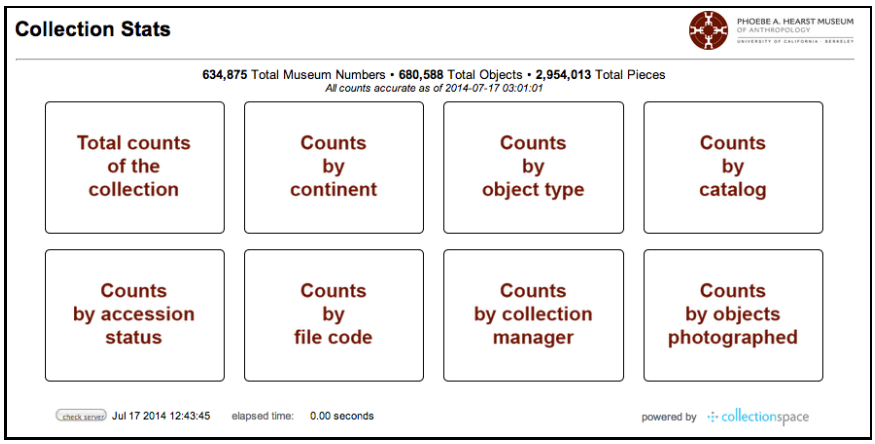


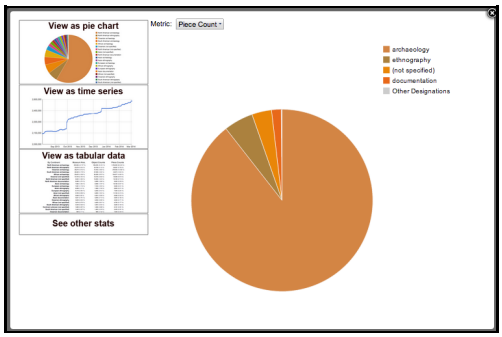
This webapp allows users to see a visual representation of the organization of any of six hierarchical authorities (all but storage location). The desired hierarchy is calculated and displayed as a series of hierarchically nested facets, which are all set to be initially open. Users can click any facet arrow to collapse (or reopen) that facet, and can click on any term in the displayed hierarchy to see the corresponding full CSpace authority term record.



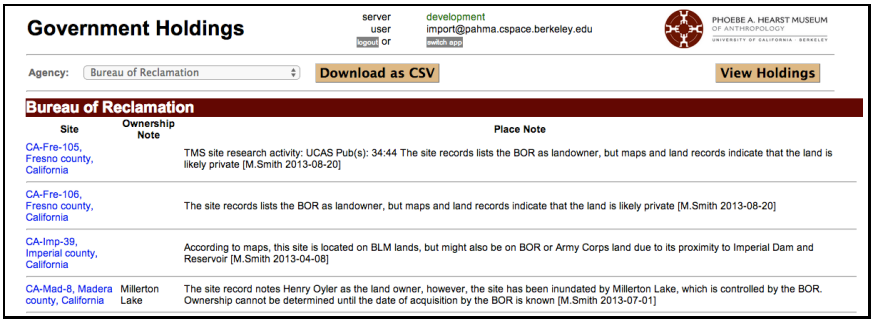
This webapp was designed to give rapid access to basic information about—and photos of—any object in the collection, either by scanning the object's barcode or by manually entering a Museum number. This webapp was designed for use on an iPad, but it works equally well on any tablet, laptop, or desktop computer. The Object Details webapp can also be used on smart phones such as iPhones and Android phones.

This webapp provides users with an overview of the scope of the collection, as well as providing rich specific metrics about the collection. These metrics can be displayed in tabular form, or as pie charts or bar charts. To see how any metric has changed over time, the values of any chosen metric can also plotted against time (with the range of dates

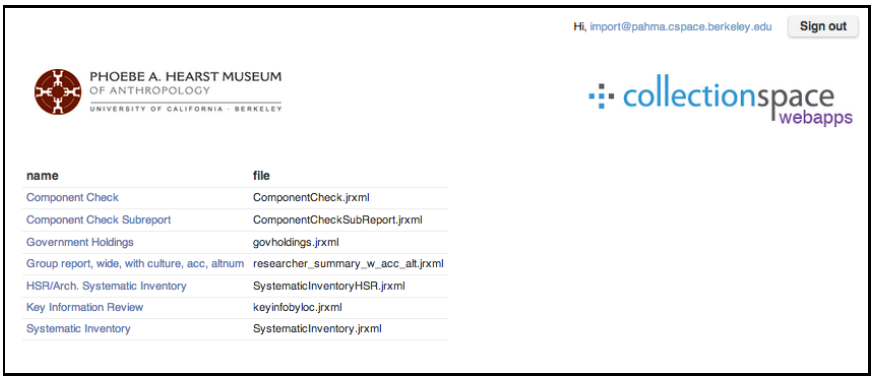




displayed also being fully customizeable). The data displayed by this webapp is updated nightly at 3:00am.



This webapp allows registrars and collections managers to see which sites are under the control of a specific government agency. Once a specific government agency has been selected, the user has the option of either viewing the results on screen or download the results as a CSV file.



This webapp provides a means to access certain reports installed on the collectionspace server. Specificly, iReports which require the user to provide parameters which cannot be provided in the "regular" UI are available here.

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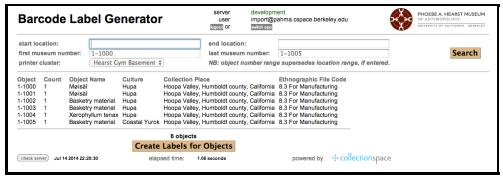
4. Barcode Handling Webapps

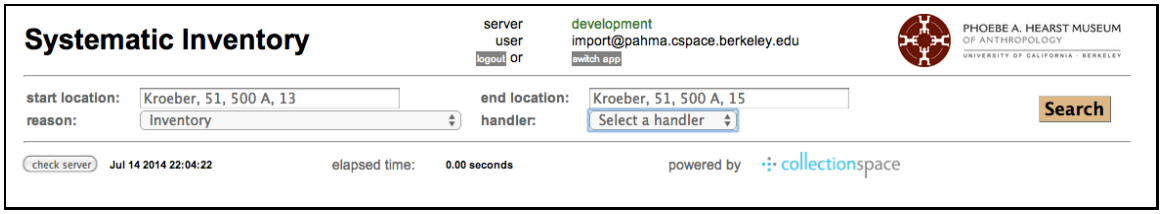
This webapp allows registrars, collections managers, and conservators to upload the movements of objects and containers that they have recorded on their TriCoder barcode scanners. These TriCoder files must first be renamed following this pattern: "TRIDATA_2014-07-16_comments.DAT". The ISO date must match the date that the file is uploaded using this webapp, even if the TriCoder data file contains movement data from other dates. The filename must also contain no spaces. Once a file has been selected and a move reason chosen, the user clicks "Upload" to upload the file. Once uploaded, an hourly cron script will detect and process the file, turning the TriCoder data into movement records in CSpace.



This webapp allows registrars, collections managers, and conservators to print barcoded object or location labels at any of the Museum's barcode printers. Barcoded labels can be printed singly, or in large batches defined either by a range of Museum numbers or by a range of current storage locations. The user must specify a printer cluster (currently either Hearst Gym Basement or Marchant). If a storage location or range of storage

locations has been specified, the user will be asked whether object labels or location labels should be printed.

Systematic Inventory: Step 1, Initial Data Entry



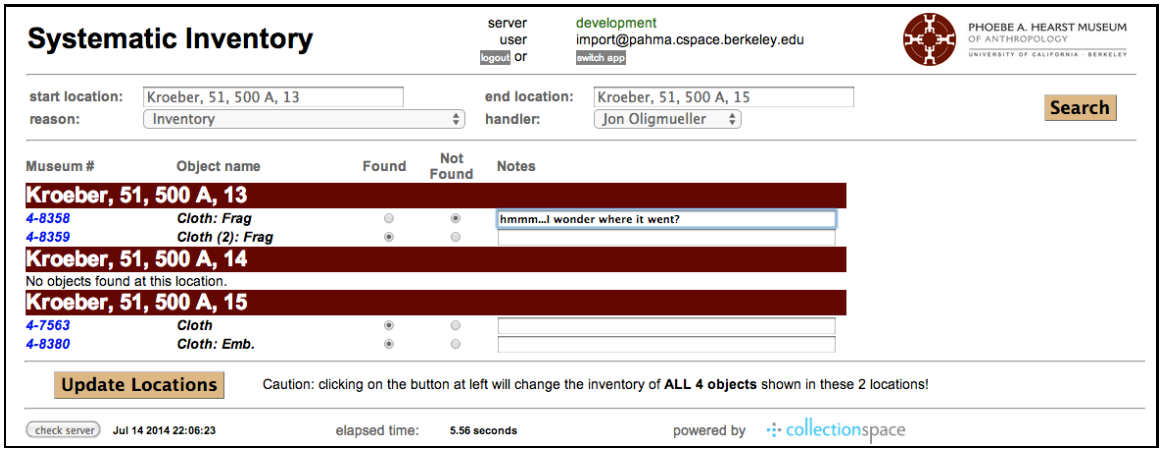
Inputs and Outputs

- Start Location
- End Location
- Reason
- Handler

Remarks

- Fill in all 4 values
- Click Search

Systematic Inventory: Step 2, Inventory Input form



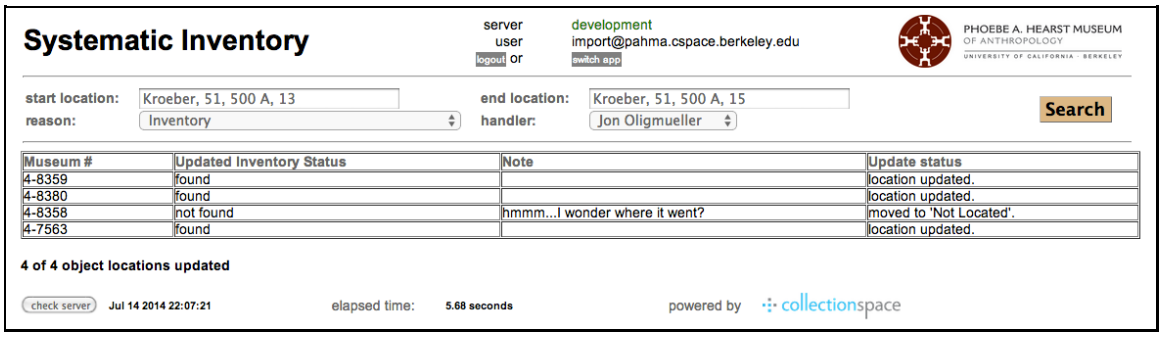
Inputs and Outputs

- If an object is not located, click the Not Located radio button for that item
- Make notes for each one if you like -- these are saved in the Movement Record in CSpace.

Remarks

- Click Update Locations to commit your inventory work to the database

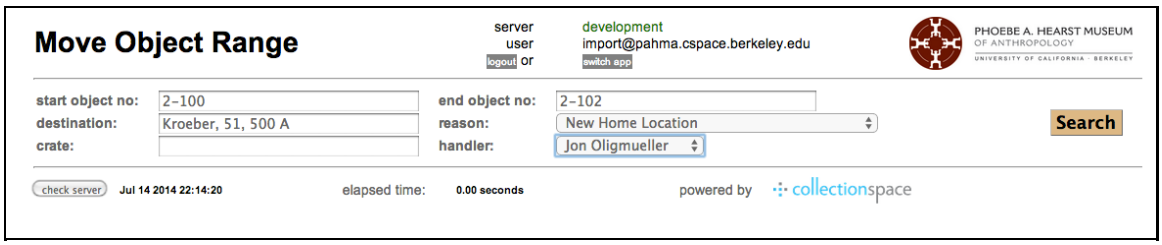
Systematic Inventory: Step 3, Result Page



Remarks

- NB: the objects are not updated in order, alas.
- You can save or print this page for your records.

Move Object Range: Step 1, Initial Data Entry



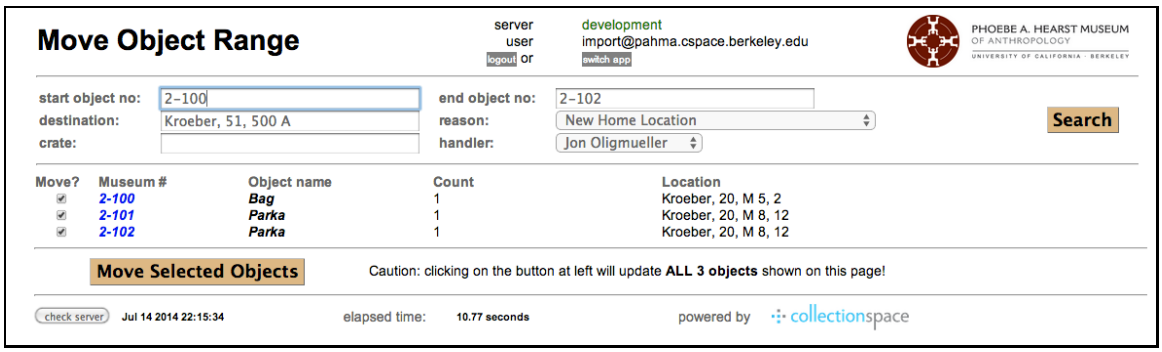
Inputs and Outputs

- Starting object number
- Ending Object Number
- Destination Locations
- Reason
- Crate
- Handler

Remarks

- A very powerful tool, use with caution!

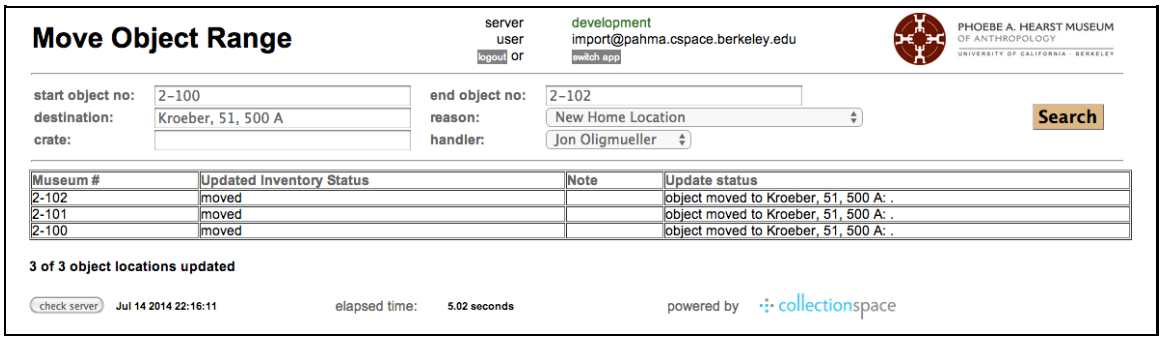
Move Object Range: Step 2, Verification Page



Remarks

- Shows the objects that will be moved.
- You can use the check boxes under "Move?" to prevent individual items from being moved.

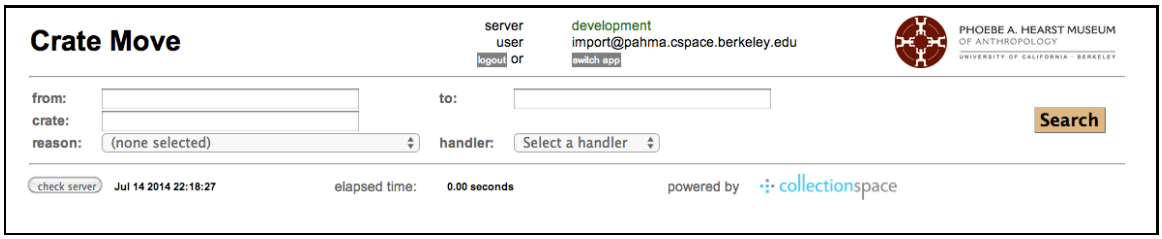
Move Object Range: Step 3, Response Page



Remarks

- Shows the result of each move.

Crate Move: Step 1, Initial Data Entry



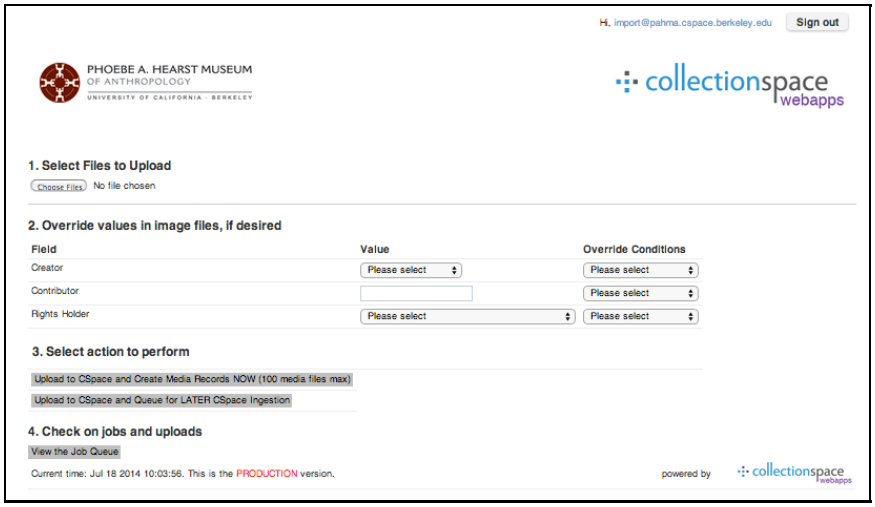
Inputs and Outputs

- "from": Location where Crate is now
- "to": Location you want to move Crate to
- Reason
- Crate
- Handler

Remarks

- This webapp deserves to be used more than it is!

Bulk Media Upload



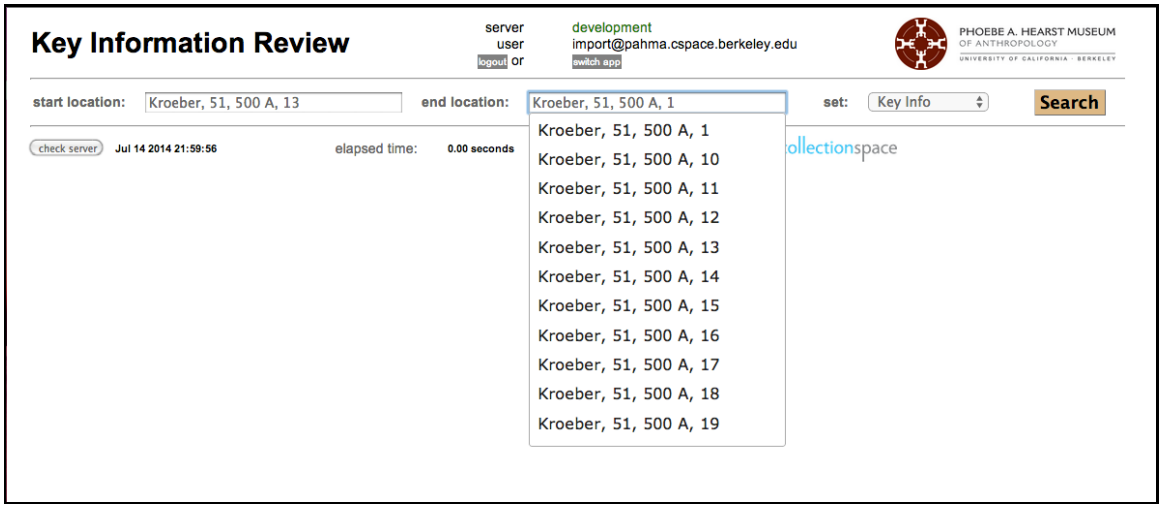
Inputs and Outputs

- A set of files, selected via the Browse button
- "Overide" values, if needed

Remarks

- To see what is in the queue, click the "Show Jobs" button.

Key Information Review: Step 1, Initial Data Entry



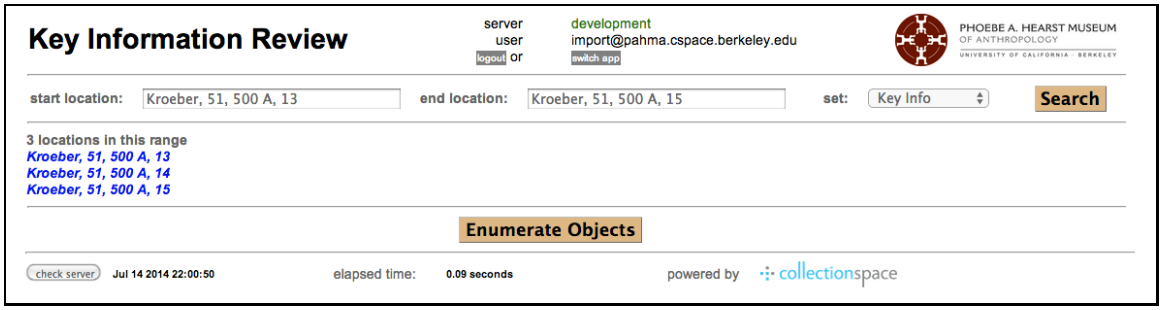
Inputs and Outputs

- Start Location
- End Location
- Field Set

Remarks

- Make sure you enter valid locations!
- Pick one of the fieldsets in the dropdown
- I.e. use the term-matching feature to identify the desired location
- Then click Search

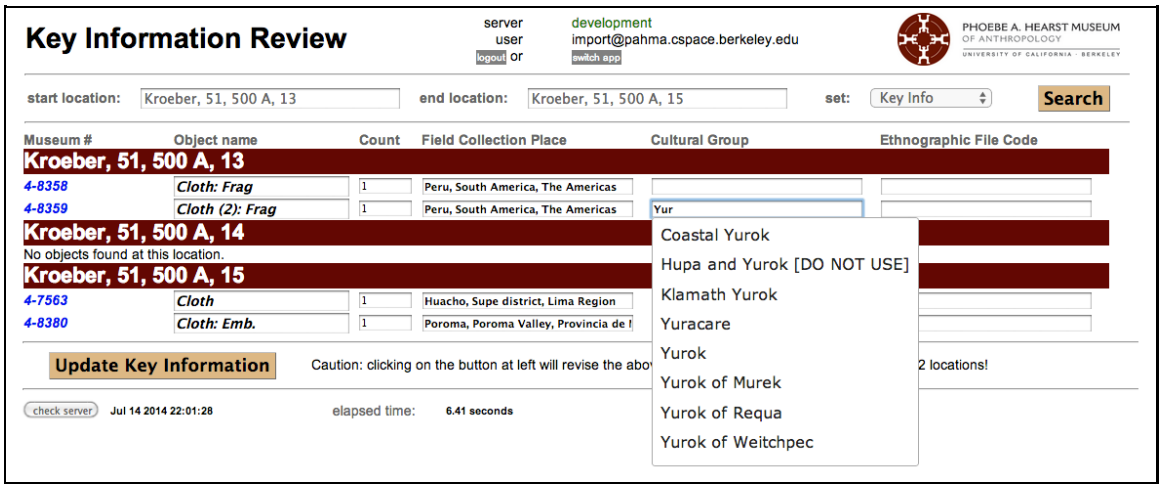
Key Information Review: Step 2, Verify Locations



Remarks

- The locations in the range you entered is shown
- You should not try to do more than a few hundred locations at a time
- A few dozen is probably the practical limit
- When you are satisfied with the range, click Enumerate Objects

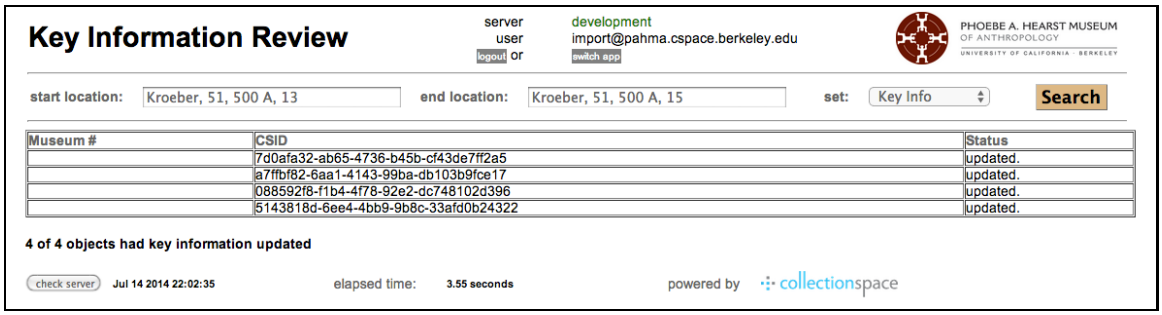
Key Information Review: Step 3, Data Entry Form



Remarks

- Depending on which fieldset you selected, you will see a set of input fields
- You may alter the contents of each field as needed
- Many (most) of the fields are "authority controlled" -- you should pick an appropriate value from a vocabulary using the term matching feature.

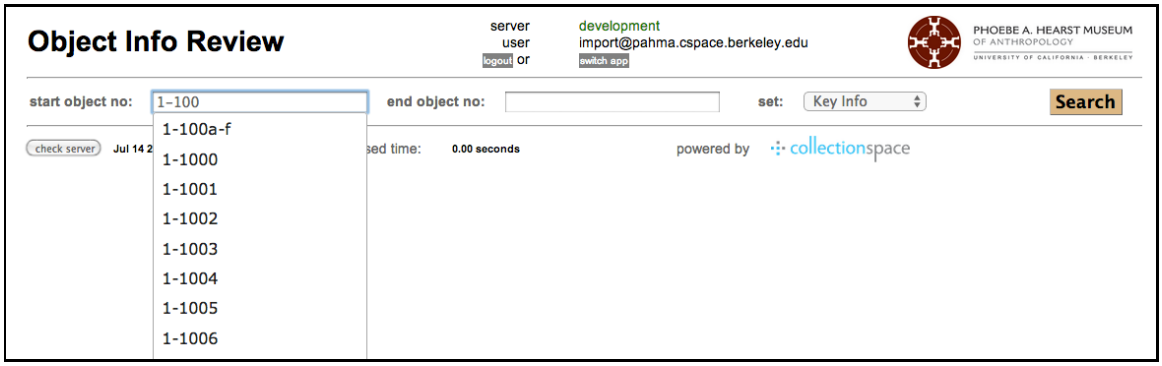
Key Information Review: Step 4, Response Page



Remarks

- At the moment, the museum numbers are not shown. If a problem is noted, you'll need to note the CSID and work back from there.

Object Information Review: Step 1, Initial Data Entry



Inputs and Outputs

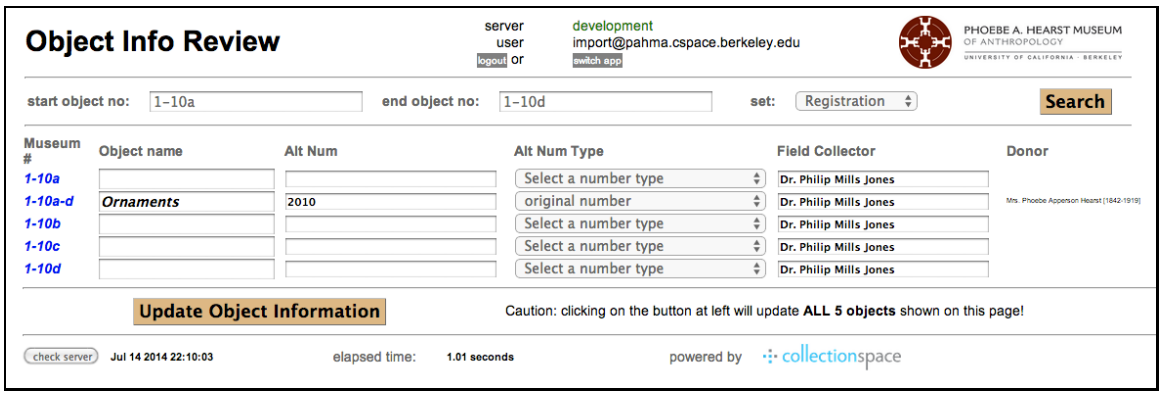
- Starting object number
- Ending Object Number
- Field Set

Remarks

- Just like Key Info Review, except it operates on a range of objects instead of locations

- Do please use the term matching feature to pick a valid object

Object Information Review: Step 2, Data Entry Form



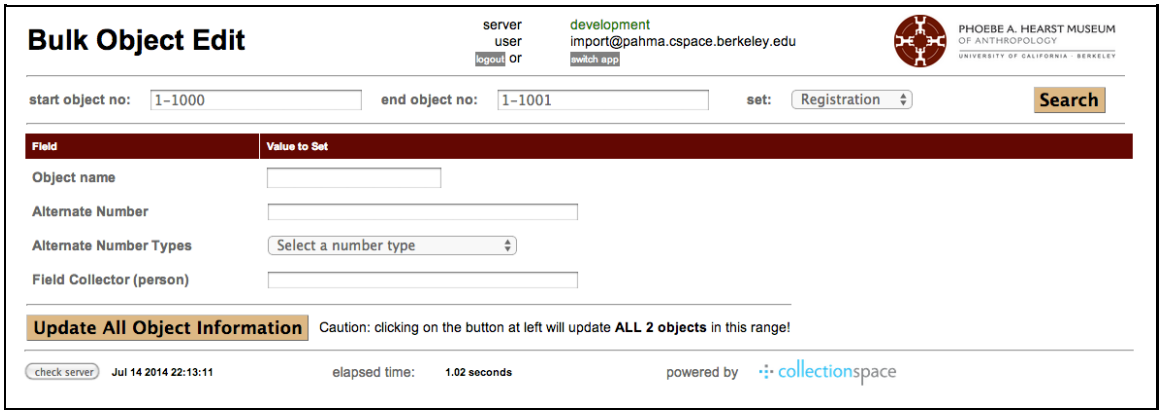
Inputs and Outputs

- Depends on fieldset selected
- See KIR

Remarks

- Click on Update Object Information to commit your changes

Bulk Object Edit: Step 1, Initial Data Entry



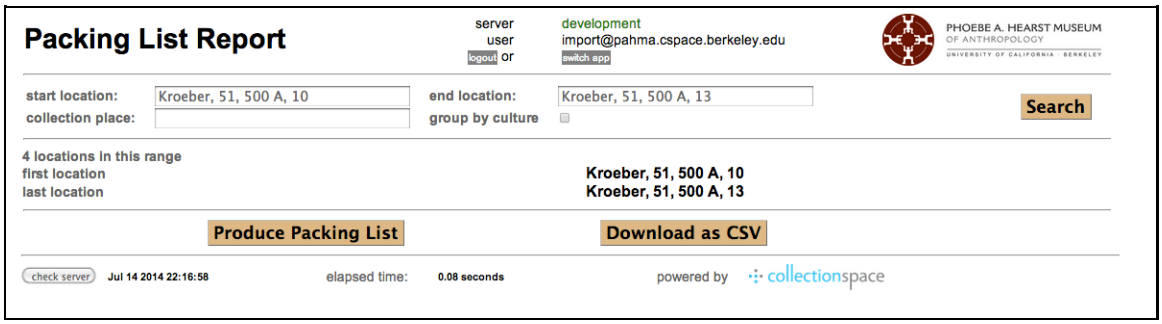
Inputs and Outputs

- Starting object number
- Ending Object Number
- Field Set

Remarks

- Like KIR and OIR, except it sets the values the same value for all the records in the range.

Packing List: Step 1, Initial Data Entry



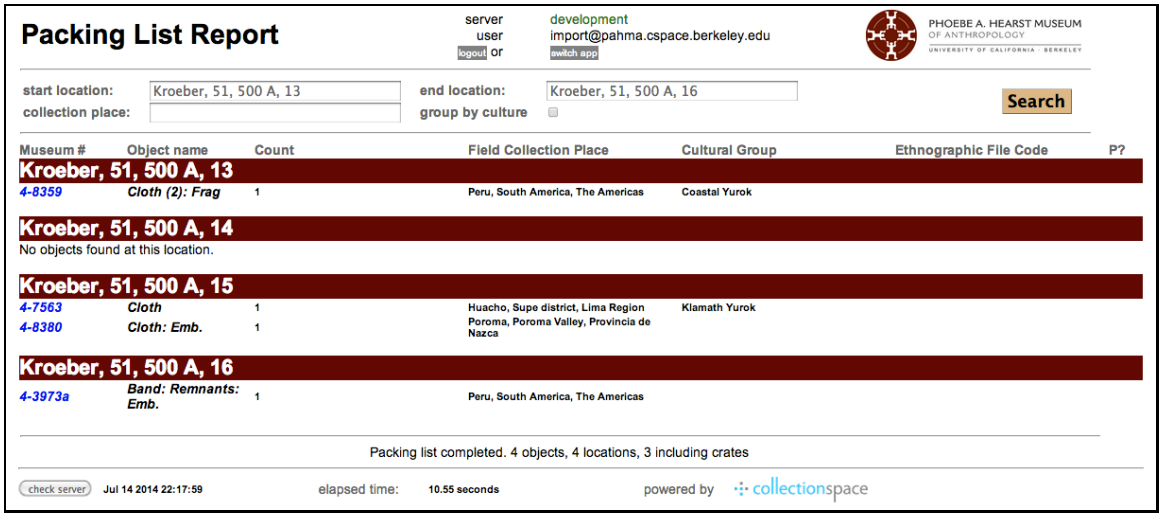
Inputs and Outputs

- Start Location
- End Location
- Collection Place: uses Place hierarchy to filter results to ONLY those within the range specified (e.g. "North America", "Asia")
- Group by Culure: if this is checked, the report will return the results grouped by Associated Culture instead of Location

Remarks

- Note that the results can be download to a .csv file for use as a spreadsheet

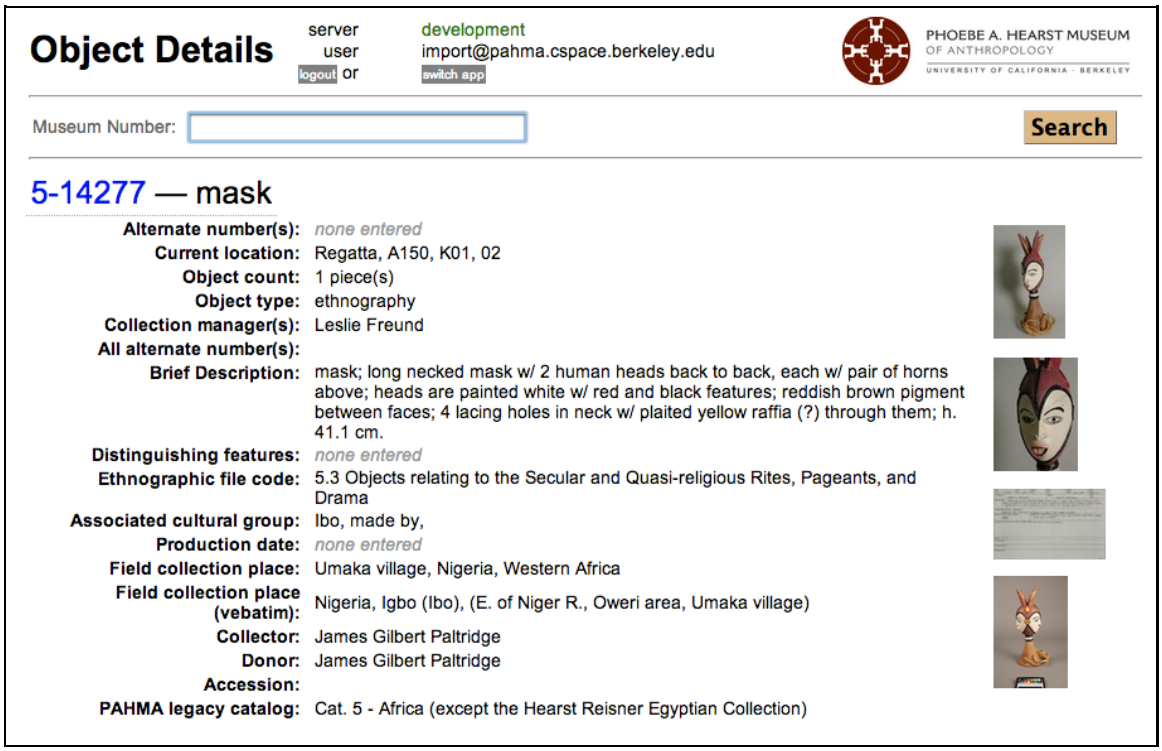
Packing List: Step 2, Response Page



Remarks

- Empty Locations are included in the output
- If there are Crates containing objects in the Locations, these are shown in the header.

Object Details



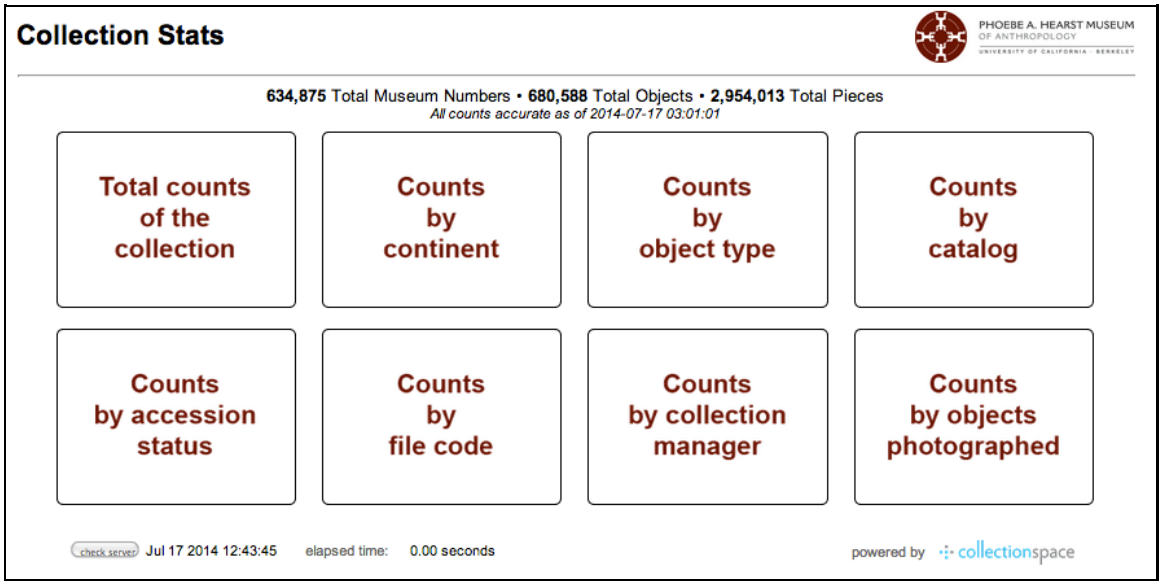
Inputs and Outputs

- Museum Number, just one

Remarks

- Displays a neat paragraph of info on the object
- Displays images if there are any.
- Clicking on the thumbnail retrieves the "OriginalJpeg" (large) derivative in a new browser window.

Collection Stats



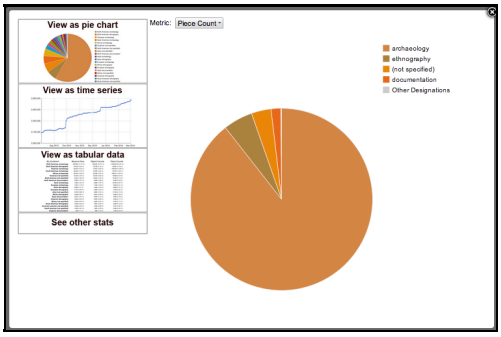
Inputs and Outputs

- No inputs; just click on the section / stats you are interested in.

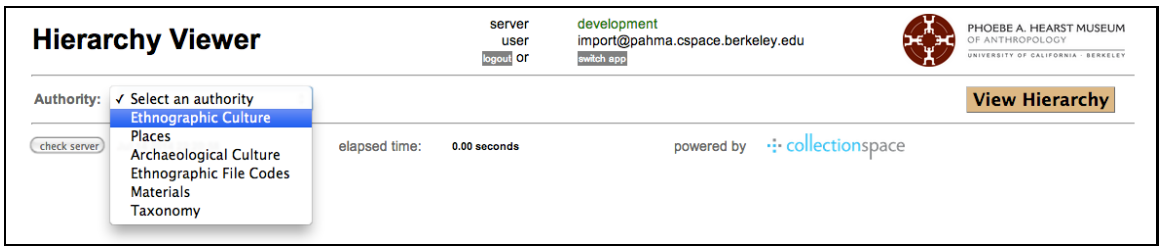
Remarks

- Might take a few seconds to load (it has to load and calculate all the stats)

Collection Stats: Sample Graph



Hierarchy Viewer



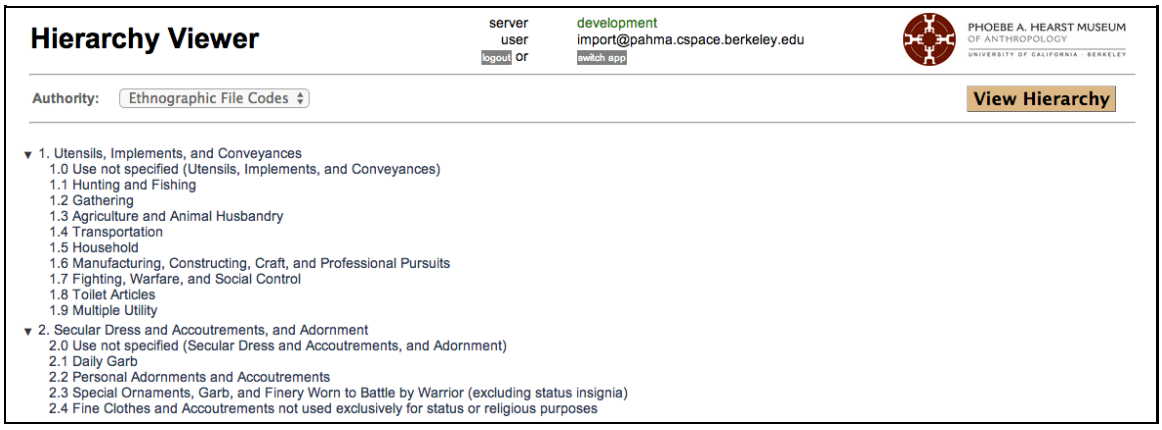
Inputs and Outputs

- Pick an authority from the dropdown list

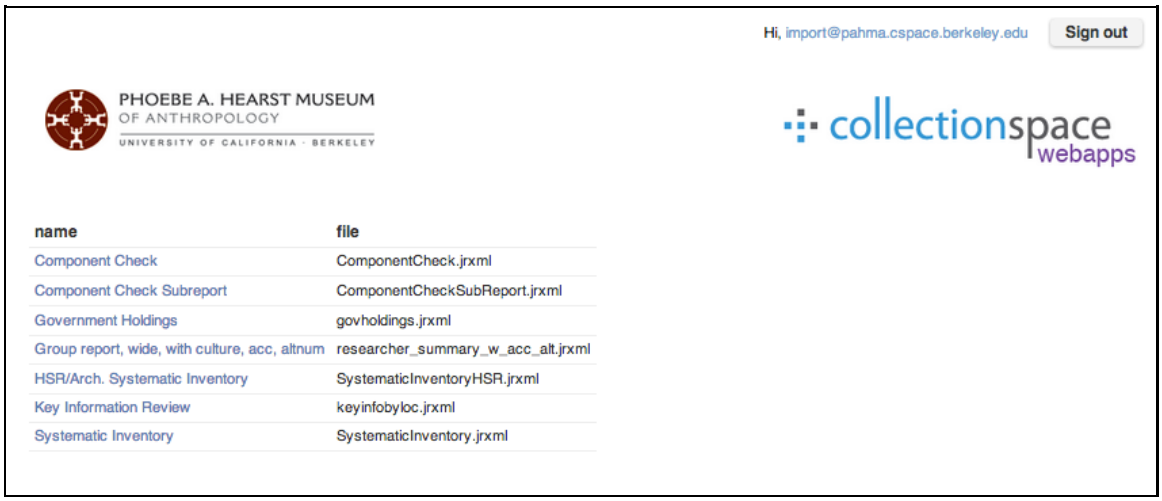
Remarks

- This can produce a rather large tree. Caveat lector!
- By default, the tree is shown completely expanded.
- Orphans (terms with no parents in the hierarchy) are shown in alphabetical sequence with the rest of the terms in the tree.

Hierarchy Viewer: Result Page



iReports Viewer



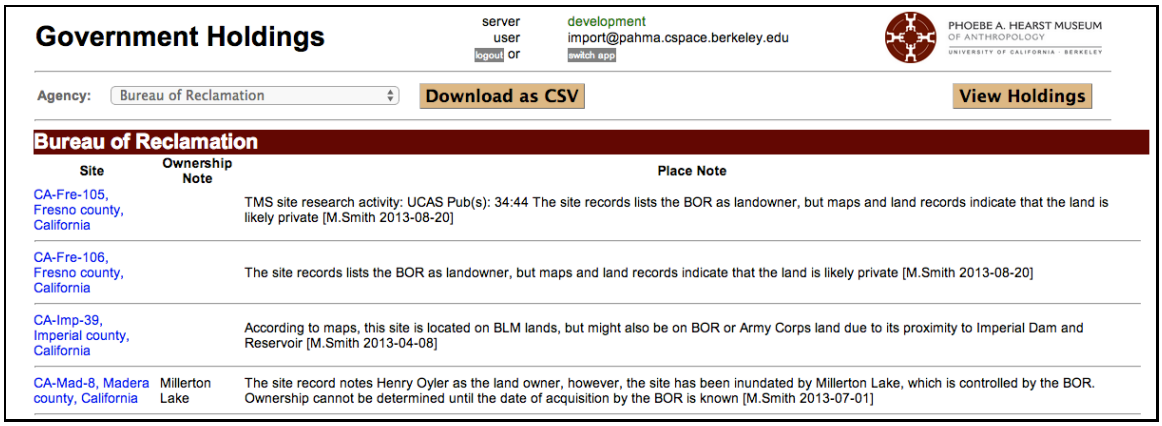
Inputs and Outputs

- Pick a report from the list.
- Enter report parameters, if any.

Remarks

- Report is returned as a PDF, which will be displayed or saved on your computer, depending on your browser settings.

Government Holdings



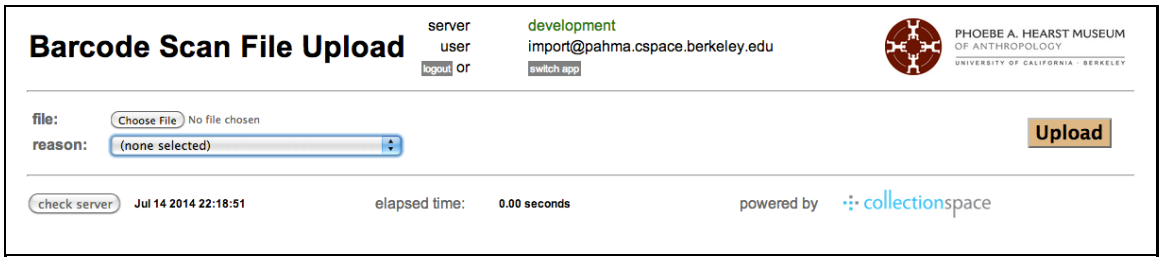
Inputs and Outputs

- Pick an Agency from the dropdown list

Remarks

- Very basic data is displayed for each site.

Barcode Scan File Upload



Inputs and Outputs

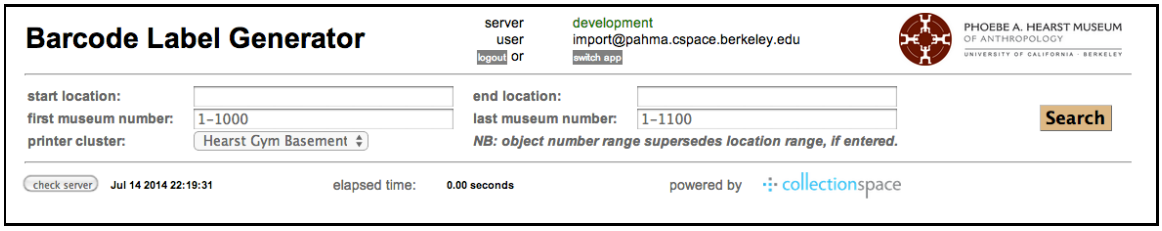
- A file on your local computer; it must be named according to the conventions used for this system.

- Reason: this is not currently used. You don't have to set a value.

Remarks

- No checking of the contents of the file or name is done by this program.
- You'll get email in an hour or so telling you what happened. If you are on the right list!

Barcode Label Generator: Step 1, Initial Data Entry



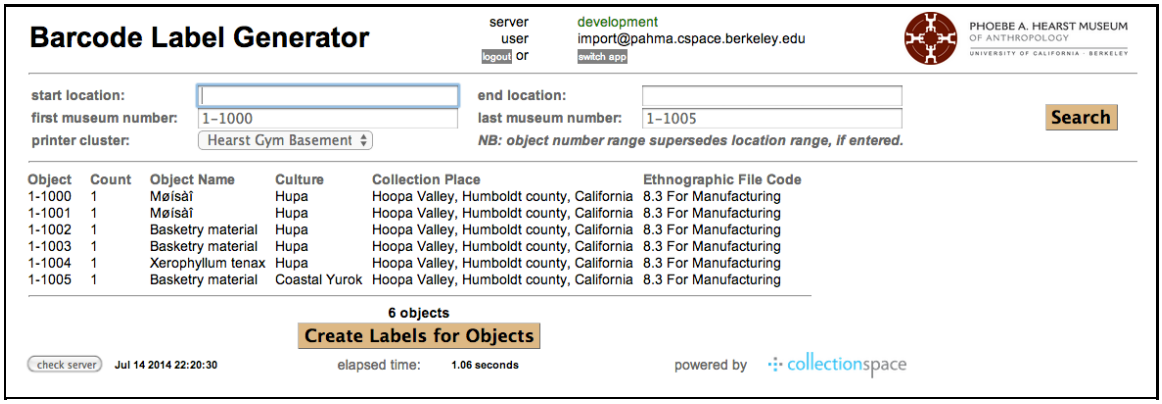
Inputs and Outputs

- Range of Locations
- OR
- Range of Objects
- Printer to print labels at

Remarks

- If you pick a range of Locations, you'll have to option to print either Object Labels or Location Labels.
- Sometimes the connection between this app and the printers goes down.
- If you suspect this has happened, click on the Check Server button at the bottom of the screen; it will tell you if the printers file system is reachable.

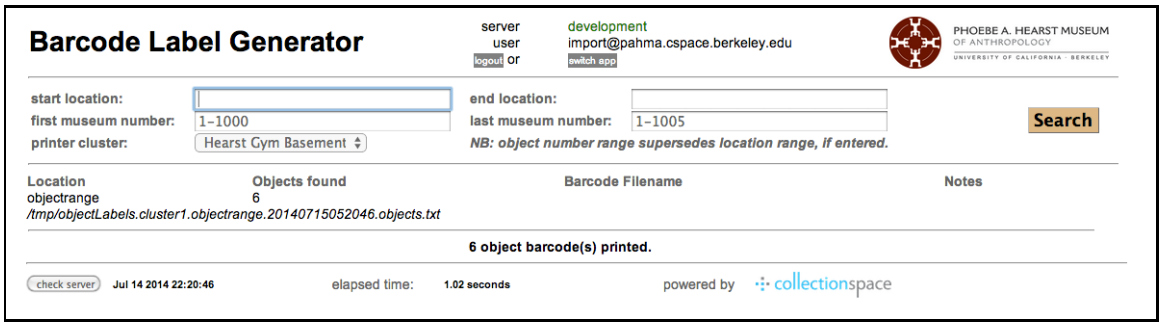
Barcode Label Generator: Step 2, Print Object Labels



Remarks

- You'll be shown the basic data for the labels you'll be printing.

Barcode Label Generator: Step 3, Response Page



Remarks

- What this app does is to create a file that is "watched" by the Barcode Label printing system
- When it sees your file, it reads the data from it and prints the label
- If you think there is a problem, keep the name of the file around for problem analysis.

Foibles and Caveats

The webapps have a number of foibles you should know about:

- Term matching for authority fields, e.g. Field Collection Place or Ethnographic Group may include terms from other vocabularies and non-preferred terms (however, deleted terms no longer show up.) In fact, the selection algorithm is a bit complicated.
- Term matching for museum numbers is on the literal value of the object number, but the range is calculated on the basis of the museum number sort field (which you cannot see, except when viewing the catalog record).
- For locations, however, both matching and ranges are based on the literal value (Locations do not have a sort field, they sort “as themselves”.)
- You do not have to enter an End Location. If you don’t the app will use the Start Location and fill it in for you.
- Most of the webapps have a limit of 500 locations in a range, and 500 objects in a location. The Packing List is the exception: it will try to render the whole museum if you ask it. This value, incidentally, is based solely on the limitations of the “average web browser”.