Collective Access Manual

1. Accessing and Navigating the Database

a. Accessing the Database

Collective access is a web-based system. That means that the work exists independently of individual museum computers. Your collection can be viewed and worked on from any computer that is connected to the Internet and runs a modern web browser such as Firefox, Safari or Internet Explorer. It also means that multiple people can work in the database at the same time without worrying about overwriting each other, or creating incompatible versions of the collections data.

Logging In

Accessing the database requires a username and a password. The ANSM database administrator will supply you with logins for your system. Logins may be created with different levels of access; for example, a student-level log in, meant for summer students, will only allow the user to edit basic information. On the other end, curator-level log ins allow you to edit and change virtually anything in the database.

To log into the system, launch your web browser and go to *yourinstitutionurl.ansmcollections.ca*. You will be presented with a log-in form (fig 1.1). Enter the information supplied by the ANSM database administrator and click on the “login” button.

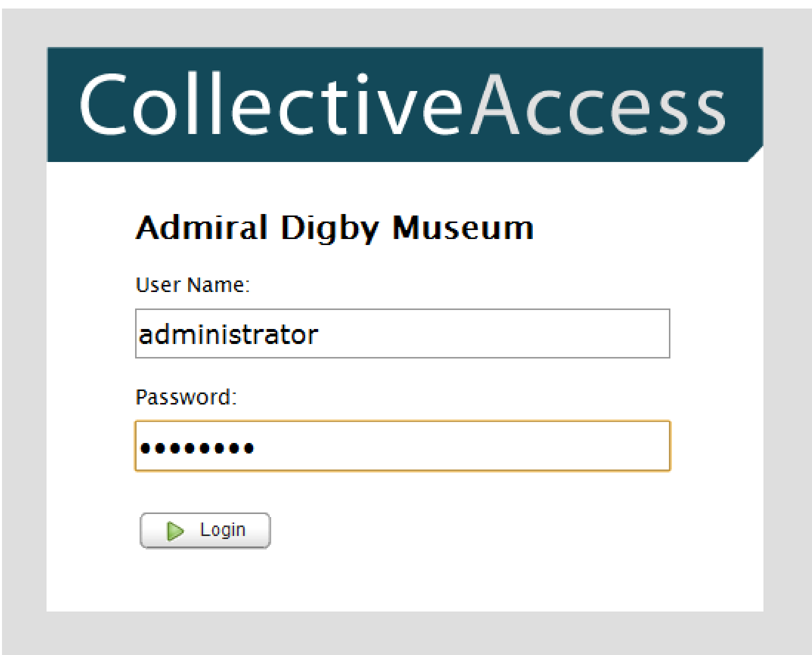

Fig. 1.1: Logging in to the Database

b. Navigating the Database

The Dashboard

The dashboard (fig. 1.2) is the first thing you see after logging into the system. This is the “home page” of the database, and you can always come back to it by clicking the logo in the top left corner of the screen.

Navigating the Dashboard

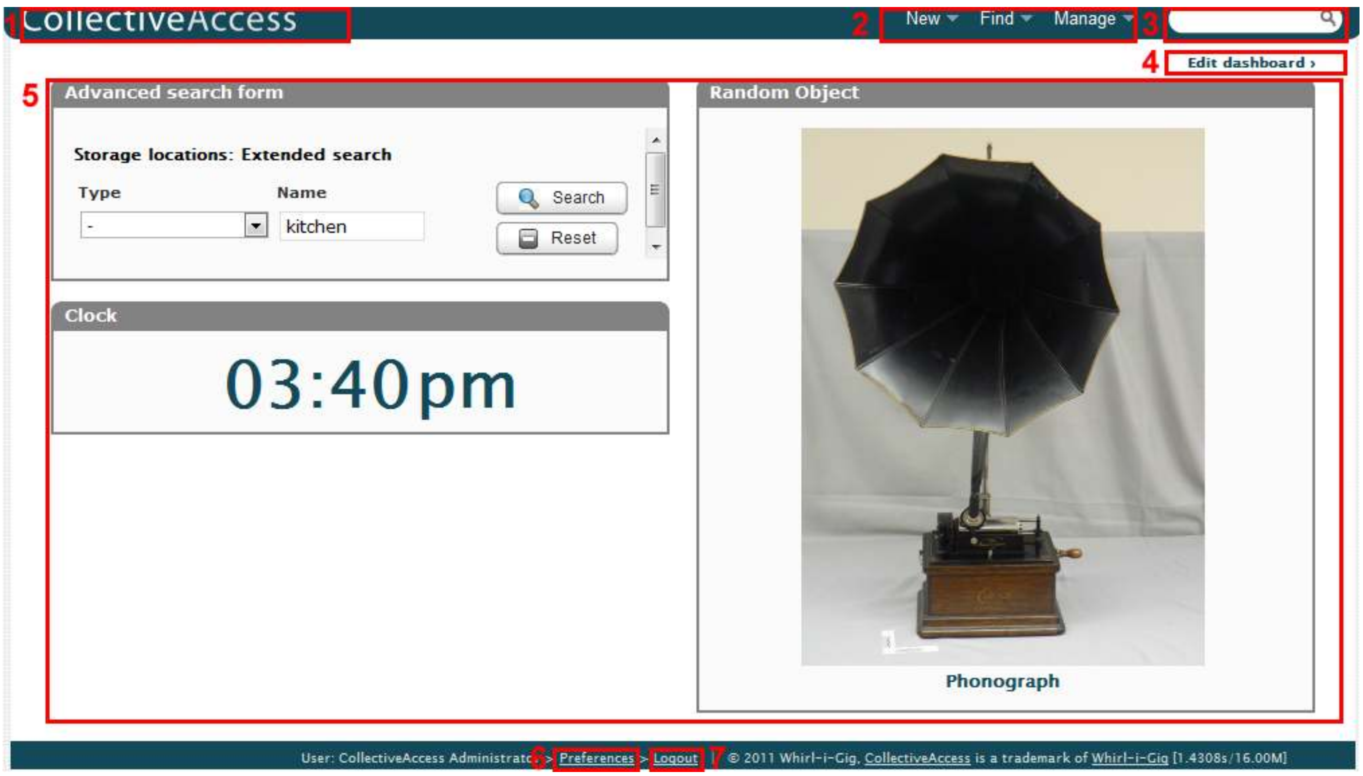

Fig. 1.2: The Dashboard

1. The Top Logo

Clicking this logo will always bring you back to the dashboard, no matter where you are in the site.

2. The Global Navigation Bar

This bar is always visible throughout the site. It has four sections—New, Find, Manage and History—and is the access point for editing and viewing your records and settings. The options under these menus will be discussed at much greater length later in this document.

3. The QuickSearch Form

This search bar allows you to quickly search by keyword. It searches on all of the primary types of records in the database: objects, entities, storage locations, historic events, collections and loans. Focused searches and browses, operating on a single record type and providing many more options, can be found under the “find” menu in the global navigation bar.

4. Edit Dashboard Button

This button opens the “edit dashboard” menu, which lets you add, edit, move or delete widgets. Widgets, simple applications providing useful functions, will be discussed in greater detail later on in this section.

5. Main Screen
The main screen displays all of your active widgets.

6. Preferences
Allows you to view and edit user preferences.

7. Logout
Logs you out of the system. Note that quitting your browser will automatically log you out of the database.

Widgets and Editing the Dashboard

Widgets are small windows on the dashboard page which allow you to quickly access common or useful information and functionality. The set of widgets visible on your dashboard may be edited by clicking on the “edit dashboard” button (fig. 1.3).

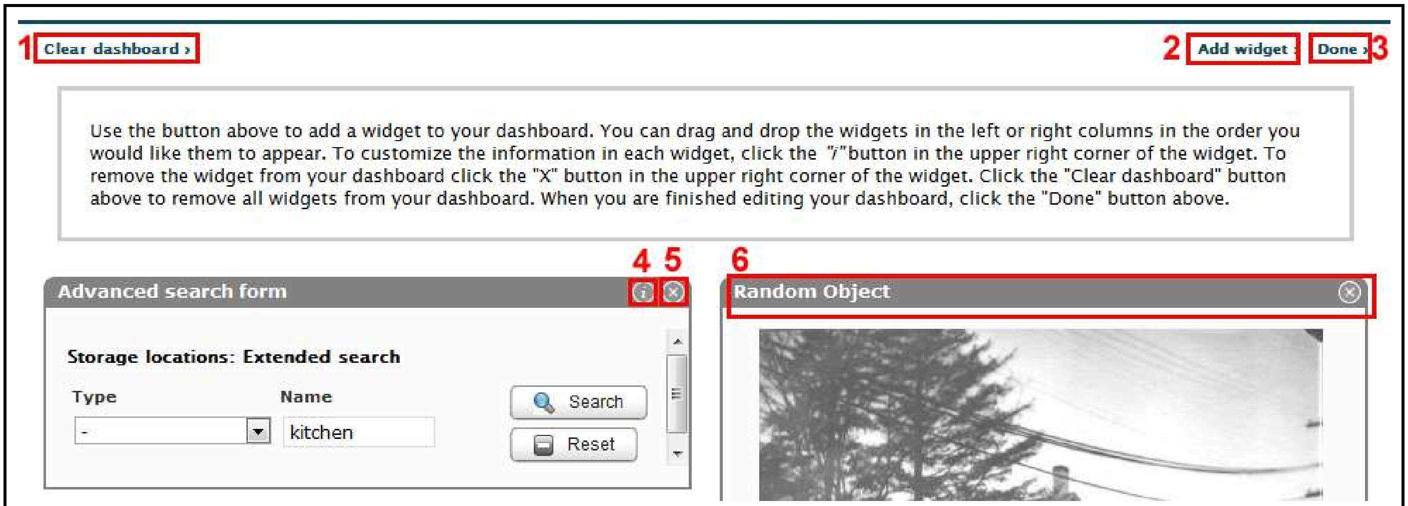

Fig. 1.3: Editing the Dashboard

1. Clear Dashboard
Clicking the button will remove all widgets from the dashboard.

2. Add Widget
Clicking this button launches the “add widget” screen, where available widgets can be selected from a list for display on your dashboard. The different widgets and what they do will be discussed later in this section.

3. Done

Click this button when you are done editing to return to the regular view. Widgets may only be added to, remove from or moved around the dashboard while in editing view.

4. Information Button
Clicking this button on any widget in the edit dashboard view allows you to view and edit the settings for the widget. For instance, in the clock widget it allows you to choose between viewing the clock as digital or as faux analogue, and whether or not to show seconds. In the recent changes widget, you can control the maximum age of displayed changes as well as the type of records for which changes will be tracked.

5. Delete Button
Removes the widget from the dashboard. Widgets can always be re-added from the "add widget" screen.

6. Moving a Widget
Widgets can be reordered using the mouse cursor. Simply click on the grey bar at the top of the widget window and drag it to the location in which you'd like it.

There is also a YouTube tutorial which covers editing the dashboard. A full list of available widgets and their functions can be found on the Collective Access Support Wiki.

The Global Navigation Bar

The global navigation bar is your main tool for interacting with the database. It contains four menu clusters—New, Find, Manage and History—and the quick search bar. Each of the four menu sections expand when the mouse cursor is held over them, revealing more options. More detail on each section will be found later in this document.

New

The "new" menu contains options for creating new records. This is where you go to create new artifact and archival records, sources, storage locations, collections and more.

Find

The options in the "find" menu allows you to interact with items already entered into your database. This is where you go to search, browse and edit items.

Manage

"Manage" allows you to control the way in which you use the Collective Access system, from user preferences to organizing how information is displayed. These options do not relate directly to your collection, but rather to how your collections database is administrated.

History

Provides a list of recently viewed and edited records.

QuickSearch

This search bar allows you to quickly search by keyword across all records.

2. Objects

Objects are the artifacts and archival items in your collection. This section explains how to create new object records, find old records and edit information.

a. The Object Worksheet

Information about an object is entered on the object worksheet (Fig. 2.1). Worksheets are the main way in which you enter your data into the CollectiveAccess system, and the worksheets for other types of data—for instance, entities, historic events and even storage locations—follow similar patterns.

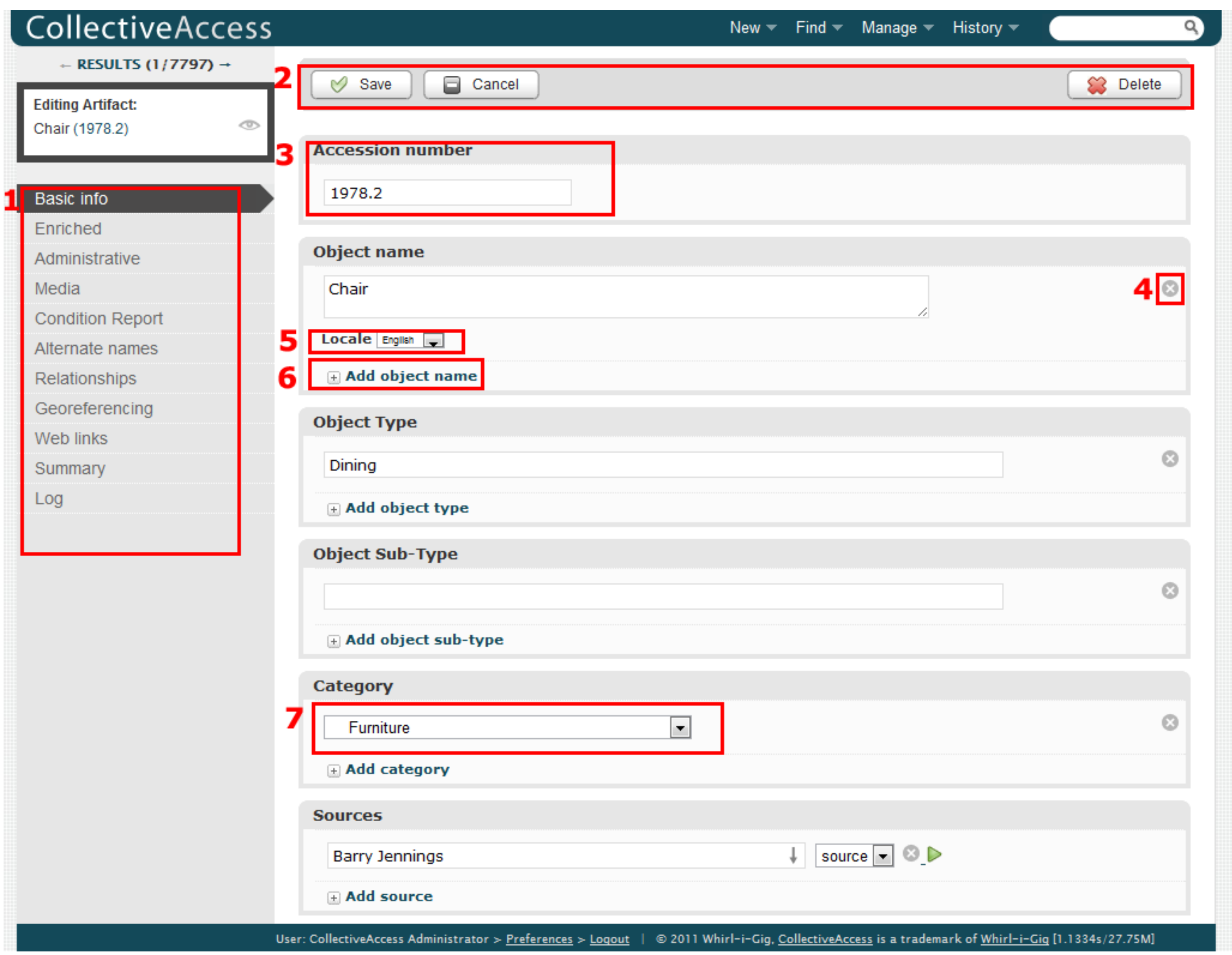

Fig 2.1: The Artifact Worksheet

1. Local Navigation

The worksheet for each type of record is divided into multiple screens, each of which contain entry points different kinds of information. This section allows you to navigate between them and remains fixed in place, even as you scroll down in the main window.

2. Control Bar

Options for saving and deleting the record and cancelling changes are located here. Records do not save automatically; you must remember to hit the save button after entering new information. However, if you do not and attempt to navigate away from a page with unsaved information, the system will remind you of the need to save.

3. Field

Each record is made up of a series of named fields (Fig. 2.1.2). The information which is to be placed in each field is explained briefly by the built-in data dictionary, which can be accessed by hovering your mouse cursor over the name of the field. More detailed definitions, including cataloguer's rules and examples, can be found at the CHIN Humanities Data Dictionary. In general, the fields have the same definitions and rules as the fields in the old Microsoft Access-based Passage Project system.

There are a number of types of fields which are used in the system: basic text fields; "rich" text fields which allow you to format text by bolding, italicising and more using an in-browser text editor; date fields, which only accept dates and date ranges; measurement fields which accept length and weight quantities using English or Metric units; web link (URL) fields; drop-down menus; and lookup fields which draw from a specific list, prompting you with items as you type. Restricted fields like date and measurement will convert your entered data into a preferred format on saving, and may not allow data to be entered in certain ways; if there is a problem with the format of the data you have entered, the system will display the cause of the error and not allow you to save.

4. Delete Button

Deletes or collapses a field. Fields can be reattached, but deleting a field permanently removes the information entered. Note that deleted information is not actually removed until the record is saved. You can recover mistakenly deleted information by clicking on the "cancel" button rather than saving.

5. Locale

Defines the language in which the field content is entered. The system supports English and French; it is important to remain attentive to which language you are entering in. Many fields, such as Object Name and Description, allow only one entry in each language; others create fields in language pairs, automatically creating a French-language field following an English one despite the fact that you may have as many fields as you wish.

It is important to note that entering information in French, while supported and encouraged, is not required.

6. Add Button
Adds an extra entry area for the associated field.

7. Drop Down Menu
Allows you to select from a pre-defined set of options.

The Inspector Window

After a record has been saved for the first time, the inspector window will appear in the top left corner of the record (Fig. 2.2).

Fig. 2.2: The Inspector Window

1. Results Control
These controls allow you to navigate through your search results after conducting a Search or Browse. Use the arrows to view your search results one by one. Clicking RESULTS will take you back to your full list of search results.

2. Identifying Information
Displays the object type, name, and accession number.

3. Watch List Icon

Clicking this icon adds the selected object to your watch list, which can be accessed by selecting “Manage > My watched items” from the Global Navigation Bar. The icon turns black when active.

4. Less/More Info Button
Collapses or expands the Inspector window.

5. Media Thumbnail
Shows a thumbnail image of attached media. When there are multiple items attached to record, arrow keys will appear. When clicked, the Media Viewer will launch, allowing you to pan and zoom across the image or file as well as download it in a range of sizes. It can also play audio, video media and display documents.

b. Entering Data

The CollectiveAccess database allows you to create records for three different types of objects: artifacts, archival objects and hybrid artifact/archival items. Archival items are unique, unpublished documents that show evidence of an activity or decision or achievement. Examples of archival documents include photographs, maps, floor plans, certificates, letters, diaries, reports, memos, minutes, drawings, speeches, home videos, oral histories, electronic documents, 16 mm film, etc. Hybrid objects are those which have aspects of both an artifact and an archival item, for example a Bible that contains handwritten information, or an exercise book containing entries and photographs.

The process for creating each of these records is more or less the same; the only difference is in some of the fields available in the worksheet. To begin adding a new record, from the Global Navigation Bar click on New > Object > and the appropriate object type, i.e. “Artifact” (Fig. 2.3).

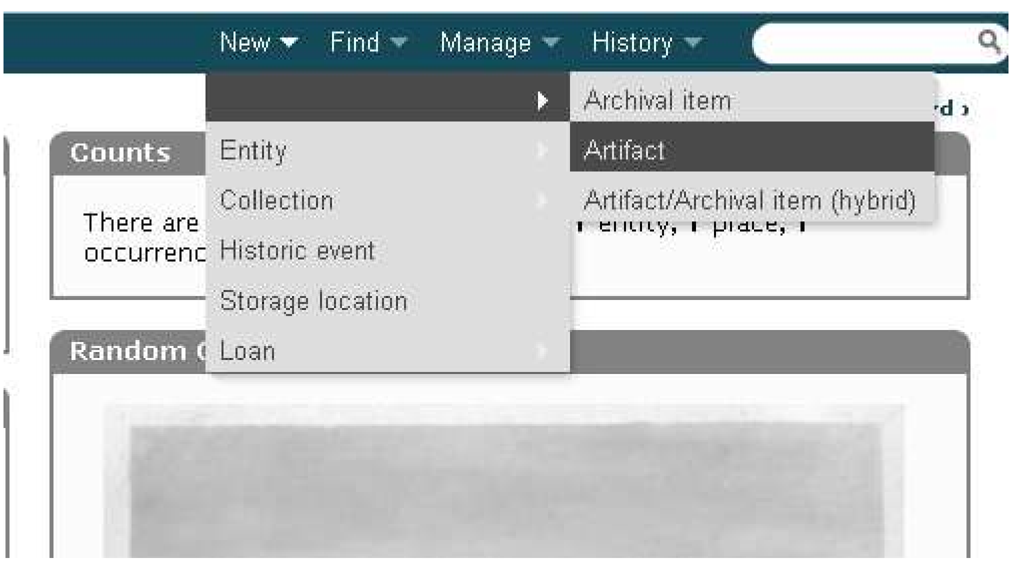

Fig. 2.3: Opening a New Worksheet

This will open a new blank object worksheet.

A YouTube tutorial covering the basic process of adding a new object is also available.

The Data Dictionary

Hovering your mouse cursor over a field title will reveal the data dictionary entry for that field, providing you with a field definition and examples where appropriate. More detailed definitions, including cataloguer's rules, entry rules and extended examples can be found by using the CHIN Humanities Data Dictionary.

Screens

Each record contains a number of screens, each of which contain fields related to a different aspect of the object record. So, for example, the "administrative" screen contains fields such as accession and acquisition dates and cataloguer information. Both artifact and archival records contain the following screens:

Basic Info

This is the first page of the record and the one which you will initially be editing (Fig. 2.2.3). It contains basic information about the object such as its accession number, name, and category. The "access" drop down sets whether or not the record is accessible on the ANSM public collections website. "Status" allows you tag the status of entry on a record. This allows you to keep track of the entry status of your records, for example quickly generating a list of all records which are not yet completely entered into the system or which require more work.

When creating a new record this first screen must be saved by clicking the "save" button at the top of the page before other screens can be accessed.

Enriched

The "enriched" page contains fields that ask you to go a little deeper into the history and nature of the object. This includes fields like narrative, culture, and distinctive marks and labels. This is also where you attach related entities to the record. Entities are people, families and organizations which act as object creators, sources, original owners, merchants, manufacturers, collectors, authors, donors, conservators, and examiners, and are crucial to ensure a complete record. One object may have many related entities; more can be added by clicking the "add relationship" button. The type of entity relationship is selected from the drop-down menu which appears to the right after entering a name.

Entities are created separately from the object worksheet and will be discussed in detail later in this document; however, you can access the relevant entity worksheet by clicking the green arrow button that appears next to the field after an entity has been attached. As you begin typing in this field the system will search the entity database and prompt you with possible matches (see Fig. 2.4).

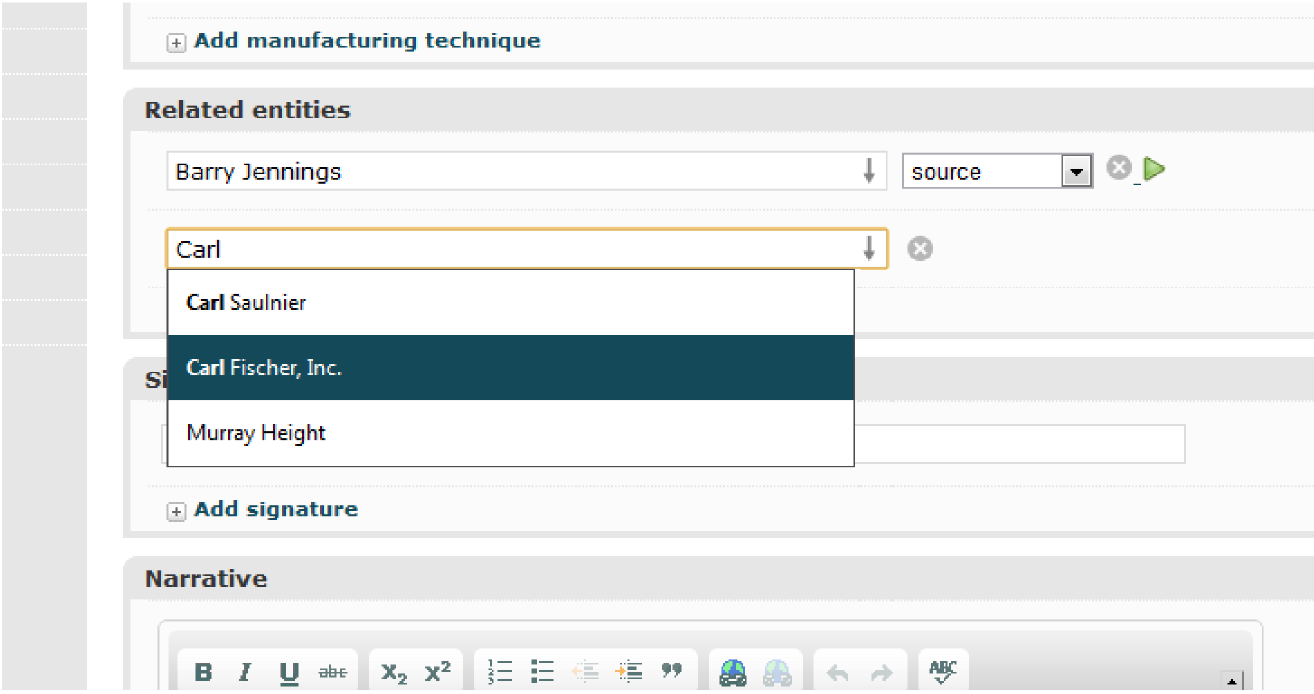

Fig. 2.4: Relating Entities to Objects using a relationship lookup field. You must type at least three letters for the system to begin searching.

Administrative

This page contains fields for administrative use, such as accession date, exhibit history and information about object deaccessioning.

Media

This page allows you to attach relevant media to the record. This includes artifact photos, videos and documents. Multiple media files may be attached. These files may be from anywhere on your computer and in almost any file type. (A full list of support file formats is available on the CollectiveAccess documentation web site)

To attach a media file, click the “choose file” button and navigate to the location of the file on your computer, and then press “open”. A series of drop-down menus allow you to choose the view of the media (back or front), whether the file will be viewable on the public website and whether or not you would like the file to be the primary representation of the object. If you would like to upload more files, click the “add representation” button and repeat. When you are done adding files, click the save button.

The database system will resize photos for you at various sizes; for this reason it is best to use the highest quality photos that you have on hand.

After you have added media to the Object record, it will appear on the media page as well as in the Inspector window in the upper left of the page (Fig. 2.5). Clicking on an image in either place will launch the Media Viewer, which allows you to pan, zoom, and cycle through images and download them at various sizes (Fig. 2.7). The media viewer can be closed by pressing the “x” button in the upper-right hand corner of the Viewer or by hitting the escape key.

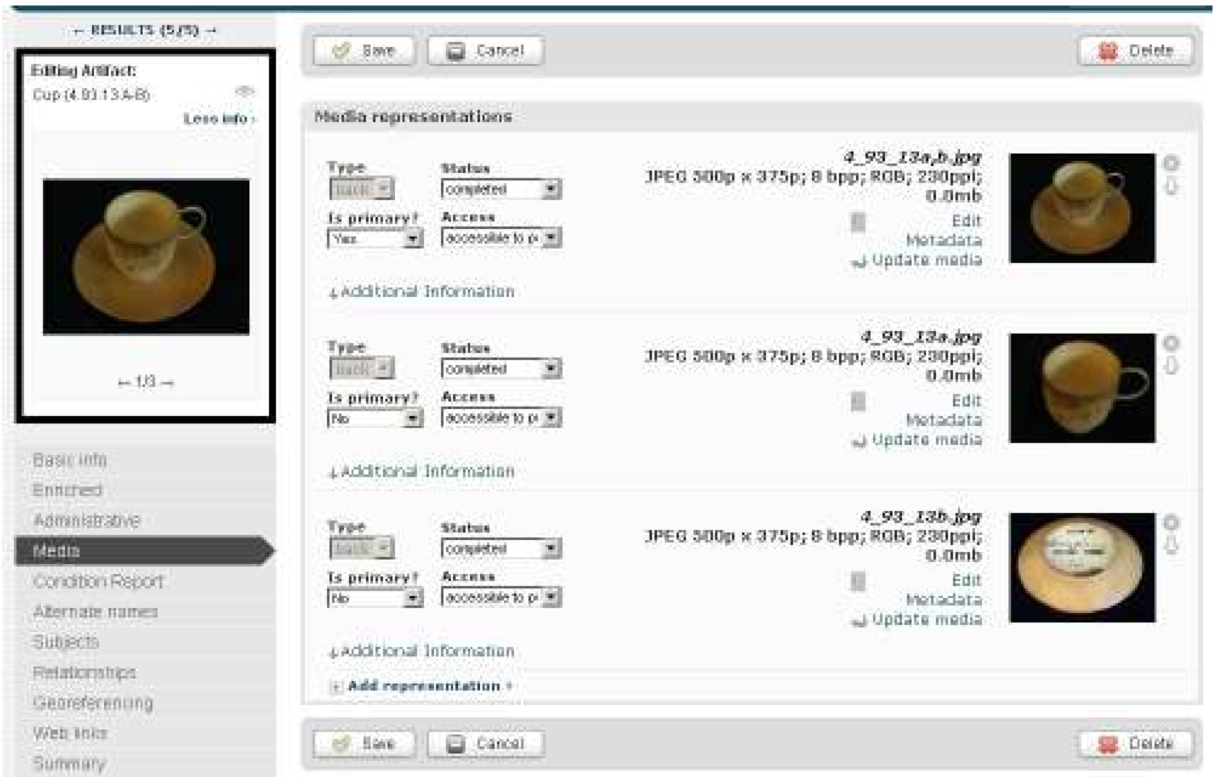

Fig.2.5: The Media Page After Attaching Images

Fig. 2.6: The Media Viewer

Captions and additional information about uploaded media can be added by clicking on "edit metadata" next to the relevant thumbnail.

A YouTube tutorial covering adding media and georeferencing is also available.

Alternate Names

Allows you to record alternate names or local colloquialisms which describe the object, for example "lobster plugs" for "lobster pegs." This makes it easier to find the objects you are searching for, especially on the public website.

There are two different types of alternate names which can be entered into the system, "alternate" and "use for," which can be chosen using the "type" drop-down menu. Alternate names are alternative, but still acceptable labels and names for an object. "Use for" names, on the other hand, are incorrect labels that are frequently attached to an item, such as misspellings. Entering "use for" names allows the proper records to appear in searches and prevent redundant records from being created.

Relationships

The relationship page is where objects can be related to other objects, entities, historic events, loans and collections. Entities can be creators, sources, original owners, merchants, manufacturers, collectors, authors, donors, conservators, and examiners, and if they have been attached elsewhere in the object worksheet—for example, adding a source on the Enriched page, or from an Entity worksheet— they will also appear here.

Entities, Collections, Historic Events, and Loans are created separately from this page, a process which will be discussed later in this document. The relevant worksheet of a related item can be viewed from the relationship page by clicking on the green arrow button to the right of the field.

To attach a relationship, simply begin typing in the relevant field, and you will be prompted with options. The exact nature of the relationship is defined using the drop-down menu to the right after the relationship has been saved.

Georeferencing

This page allows you to pinpoint a precise geographical location associated with an object (Fig. 2.7). This means you can record where a photograph was taken, the house where a particular flatiron was found or the town where a basket was produced.

Georeferencing is done through a google maps interface. To tag a location, simply drag and drop the red marker. You can zoom in and out using the plus and minus buttons and scroll by clicking and dragging the map area. To search, begin typing in the top bar and the system will prompt you with a list of locations. Locations may be as specific as a street address or as vague as a country or province.

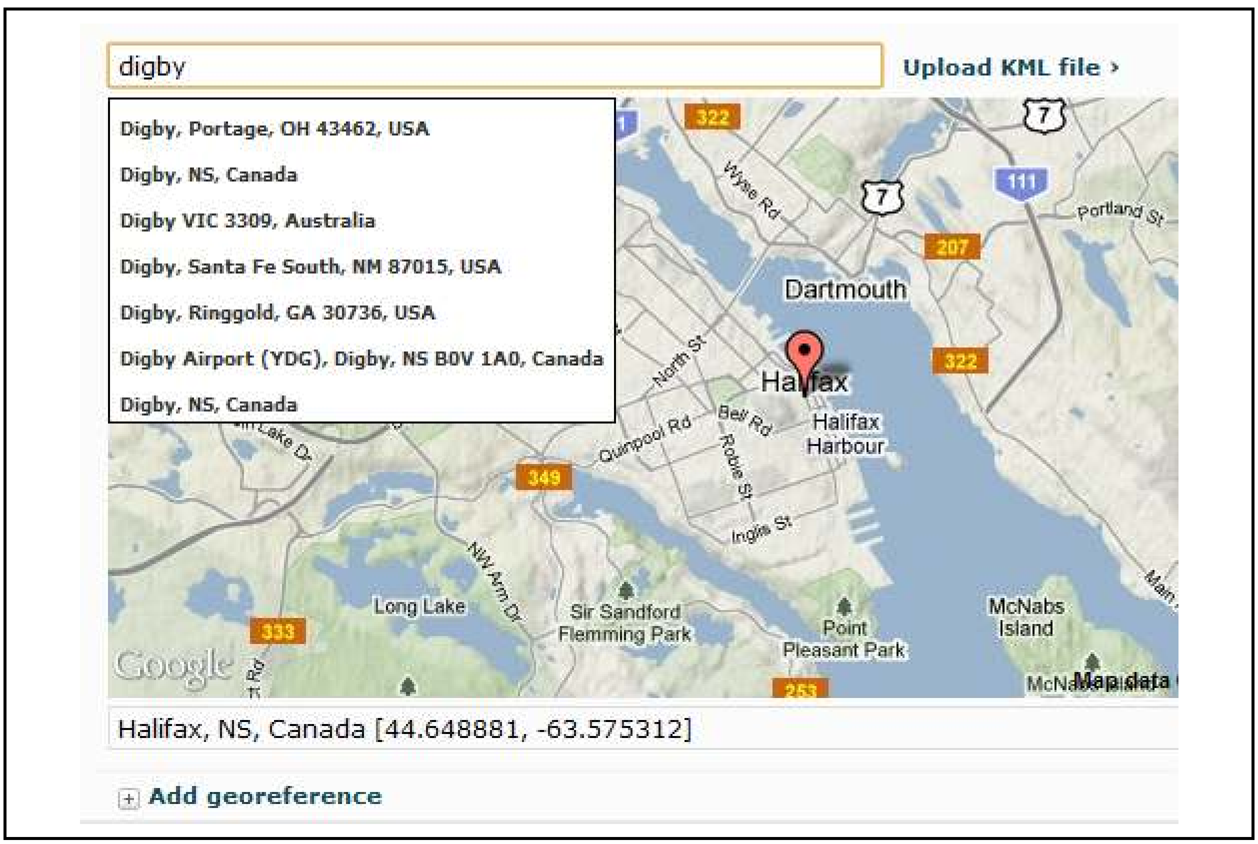

Fig. 2.7: Adding a Georeference

A YouTube tutorial covering adding media and georeferencing is also available.

Web Links

Websites and online resources which provide further information about the object can be attached here. Note that URLs must begin with “http://” to be accepted by the system.

Summary

The summary screen allows you to view and print reports. There are a number of different reports to choose from, and more can be configured using the display creator (see “8.e, Displays,” below, for more details on this process).

Report types can be chosen from the “Display” drop-down menu in the upper right of the screen. A printable version of the report can be generated by clicking the white page icon to the right of the drop-down.

Log

The Log screen tracks changes that have been made to a record—what, when, and who by. This allows you to keep tabs on what work is being done on your records.

c. Finding Objects

Object records can be found in three ways: basic search, advanced search, and browsing. All three are accessed by clicking on “Find > Objects” on the global navigation bar, and selecting the appropriate option from the left-hand local navigation menu. A YouTube tutorial covering finding objects and using the search features is also available.

Basic Search

The basic search function finds objects by keyword (Fig. 2.10). It searches across all fields in the object worksheet; this means that searching for “chair” returns not only items which are chairs, but which mention “chair” anywhere in the record. Searching for “*” will return all records.

Fig. 2.8: The Basic Search

1. The Search Field
Text to be searched is entered here.

2. Save Search button
Clicking this button saves the results of the search. Your saved searches can be accessed from a drop-down window to the left of the screen on the Basic Search view or from a widget on your dashboard, and can be modified or deleted by selecting Manage > My saved searches from the global navigation bar.

3. Search button
Clicking this button searches for the terms you have entered into the search field.

4. "Jump to Page" Navigation
Allows you to go to a specific page of the search results, useful when a search returns many pages of object records.

5. Page Browsing
Allows you to skip between pages of search results.

6. Tools
Allows you to print the results of your search off as labels, or download the results as a list.

7. Filter Search
Allows you to filter search results by entities, storage locations, types (artifact or archival), statuses and access statuses. This can be used, for example, to display all objects located in a specific storage area and is invaluable for conducting inventories.

8. Display Options
Allows you to change how search results are displayed from a number of custom or pre-configured display options. Display types are the same as for the summary page in object

worksheets. Using the right display will help you answer questions about sources of items, storage locations, culture and more. Displays are discussed at greater length in “Displays,” below.

9. Quick Sort
Clicking on either “Object Identifier” or “Name” allows you to quickly sort the search results by either accession number or object name.

10. Edit Record button
Clicking this button opens the selected object record.

Advanced Search

Advanced searching allows you to find objects using stricter criteria than for a basic search. While a basic search for “chair” will return all objects which mention chairs anywhere in the record, doing an advanced search for object name: chair will make sure that all the results are chairs.

Advanced search forms are created through Manage > My search forms. More information on creating search forms can be found later in this document.

Browsing

Browsing allows you to find similar or interesting objects without having a specific set of search criteria in mind. You can browse objects by entity, storage location, type, access status, status, and whether or not an item has associated media. Browsing by entity, for example, could allow you to see all the objects associated with a particular source; browsing by a particular storage room would let you see all of your objects which are located there and in contained units.

d. Editing Objects

Clicking through to an object worksheet allows you to edit its contents. For more information on the fields and the object worksheet, see “2.a, The Object Worksheet” above. Objects are edited by simply typing in the fields; remember to click the save button after making changes, as saving is not done automatically. Changes can be tracked in the “Log” page.

3. Entities

Entities are families, organizations or individuals who are associated with your collection objects. They are not themselves a part of your collection, nor are they to be used as a genealogical record of local families, except where these families have interacted with your artifacts and archival records. They can represent either individuals, families or organizations.

Entities are object creators, sources, original owners, merchants, manufacturers, collectors, authors, donors, conservators, and examiners.

The entity worksheet is similar in appearance and function to the object worksheet, discussed at length above (see 2.a, “The Object Worksheet”). A YouTube tutorial covering the basics of adding a new entity is also available.

a. Entering Data

Screens

The Entity Worksheet has seven screens: Basic Info, Alternate Names, Contact Info, Relationships, Links, Summary and Log.

Basic Info

This is the initial page of the record. It records basic information such as names, display name, and description of the entity. Individuals and families have fields for lifetime; Organizational entities ask for such information as date of incorporation and brand names.

For families and organizations, name information should be entered only into the “surname/organization”field. Display names are automatically generated on saving, however they can be edited by typing over.

Alternate Names

Allows you to attach alternate names to the record, which will be associated with the record in searches but are not the way in which the record is primarily referred to. This section would, for example, allow you to add common nicknames for sources or *noms de plume* of authors.

Alternate names can be either an alternate acceptable label for an entity (identified as “alternate”), such as a maiden name or nickname, or a name commonly but incorrectly associated with an entity (identified as “use for”), such as a misspelling. “Use for” names will never be used as labels for an entity, but will allow the correct entity to appear on searches for the incorrect name.

Contact Info

Records contact information about the entity, including address, telephone number, and email where relevant.

Relationships

Records the relationships between the entity and objects, other entities, historical events and collections. This page would, for example, allow you to associate a particular manufacturer with a display collection, or an original owner with an historical event such as World War II. Linked records can be viewed by clicking on the green arrow button.

To attach a new relationship, simply begin typing the relevant field; the system will search through the records and prompt you with suggestions (Fig. 3.1). Events, Entities and Collections are searched for using their associated names; Objects can be found by name or accession number.

Fig. 3.1: Adding Relationships.

Relationships between entities and objects can also be set in the “relationship” or “enriched” page of the relevant object worksheet.

Links

Same as the “Links” page in the object worksheet. Websites and online resources which provide further information about the object can be attached here.

Summary

See “Summary” under “2.b, Entering Data”, above. Allows you to print reports relating to the selected entity.

Log

Same as the “Log” page in the Object Worksheet. The Log page tracks changes that have been made to a record—what, when, and who by. This allows you to keep tabs on what work is being done on your records.

Adding an Entity

New entities can be added by selecting New > Entity in the Global Navigation and then choosing the appropriate entity type, either individual, organization or family (Fig 3.2). You do not identify the entity relationship (ie Source, Owner etc.) at this level.

Fig. 3.2: Adding a New Entity

b. Finding Entities

Much as with Objects, Entities can be found using Basic Search, Advanced Search, and Browsing (See "2.c, Finding Objects," above). Entities can be browsed by gender, type (family, organization or individual), status and access status. The Entity search menu can be accessed by selecting "Find > Entities" on the Global Navigation bar.

Entity records can also be accessed from related Object, Event and Collection records by clicking on the green arrow that appears next to the Entity name after saving (Fig. 3.3).

Fig. 3.3: The Access Entity Worksheet Arrow.

c. Editing Entities

To edit an entity, you must first find the entity using the "Find > Entity" menu (see "3.b, Finding Entities"). After you have made changes to a record be sure to save them using the green "save" button, as changes are not automatically recorded.

4. Collections

Collections can represent physical collections, "virtual" collections of items associated by some criteria, or any other arbitrary grouping. They can be used for everything from simple grouping of objects to containers for collection-level finding aids.

The system allows for two different types of collections, archival and administrative.

To create a new collection, select “New > Collection” from the Global Navigation bar. This opens up a blank Collection Worksheet (for more on worksheets, see “2.a, The Object Worksheet”). The only things needed to create a new collection is a name and a collection identifier. The collection identifier must be unique.

Relationships between this collection and entities, objects, events, and other collections can be added using the “relationships” page, or through the relationships page of the relevant objects and events (See “Relationships” under “2.b, Entering Data” above).

5. Historic Events

Objects, Entities and Collections can also be related to specific historic events. Historic events can be created by selecting New > Historic Event. They are set up and related to Objects, Collections and Entities through the relationship screen (See “Relationships” under “2.b, Entering Data” above), similar to collections.

6. Storage Locations

Storage locations in in Collective Access are recorded as part of a nested hierarchy. This means that you can define buildings, rooms within those buildings, units within those rooms and boxes in those units—as detailed and deep as you want or need.

a. Storage Locations Search and Hierarchy Page

Selecting either “New > Storage Location” or “Find > Storage Location” will open the Storage Location search and hierarchy page (Fig. 6.1).

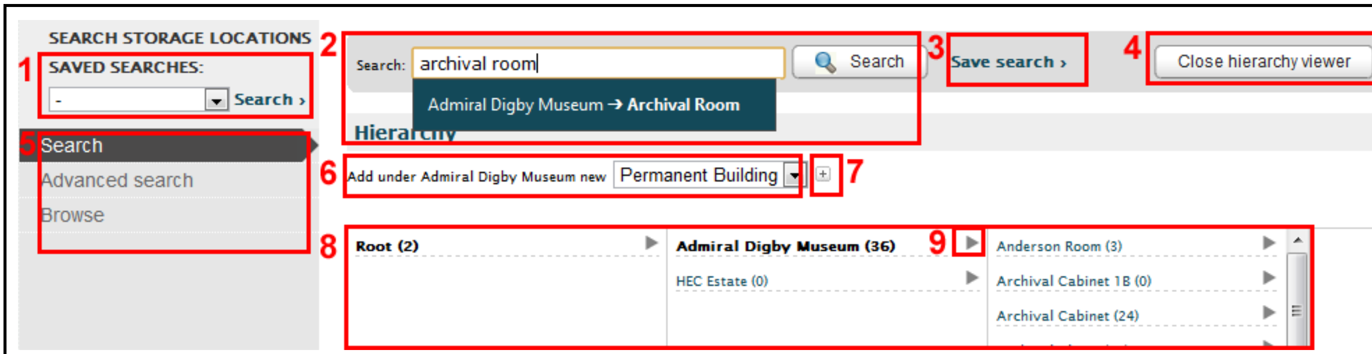

Fig. 6.1: The Storage Location Search and Hierarchy Page.

1. Search Options

Contains drop-down menus that allow to you access your saved searches, search history and more. This section changes depending on if you are on the Basic, Advanced or Browsing pages.

2. Search Bar
Allows you to search for storage locations by name or keyword. Search results appear below the hierarchy viewer; clicking on the white page icon takes you to the location's worksheet, and clicking on the green arrow button shows you its location in the hierarchy. Searching for "*" returns all storage locations. As you type, the system will search for possible matches.

3. Save Search Button
Saves the results of a search. Saved searched can be viewed through the Local Navigation menu, through the "Manage" menu or through a dashboard widget.

4. Close/Open Hierarchy Viewer
Closes or opens the hierarchy viewer.

5. Local Navigation
Allows you to switch between different types of searches.

6. Add Storage Location Drop Down Menu
Allows you to select the type of storage location to be created—either a building, room or unit. The containing location is selected by clicking on it in the hierarchy viewer.

7. Add Storage Location Button
Click to add a new record of the type selected in the drop down menu in the specified location.

8. Hierarchy Viewer
Shows all storage locations as part of a nested hierarchy. Bolded locations are the selected locations; the numbers in brackets identify how many other units are contained within those locations. Click on a location to show or add nested locations.

9. Edit Storage Location Button
Click on the grey arrow to view and edit the location's worksheet.

Search results appear below the hierarchy viewer.

b. Adding a New Storage Location

Adding a new storage location is done from the storage locations search and hierarchy page.

Fig. 6.2: Adding a New Storage Location

To add a new location, first select the building, room or unit in which it is located. If you are adding an entirely new building, select "root."

Then select the type of location you are adding—either a building, room, or unit—from the drop down menu, and click on the small plus icon to the right of the menu to open the storage location worksheet. In the example above (Fig 6.2), a new unit is being added to the room "Kitchen."

The Storage Location Worksheet is very similar to other worksheets that have already been covered in this guide (see "2.a, The Object Worksheet" above). There are, however, three key features to take note of:

Location Screen
Shows the location's place in the storage hierarchy and the hierarchy viewer (when toggled). The hierarchy viewer in this view can be used to add more locations and move the current location to a different location in the hierarchy by using the "move" and "add" tabs.

Contents Screen
List the objects associated with the location. Does not list objects associated with units within the location; in other words, if you are viewing the contents of the kitchen, it will not display items located on named shelves and cupboards in the kitchen.

If you would like to see all the items contained in a location as well as its subunits, the best way to do this is to make a basic search (either keyword or star) and then filter by your desired storage location, or browse by storage location (for more information on finding items, refer to "2.c, Finding Objects" above).

New objects can also be associated with the location from this screen in the same way as the objects and entity "relationships" screen.

7. Loans

Loans are used to track objects that are on loan to or from other institutions. Navigating to New > Loan in or out will allow you to create a new loan, entering in contact information and other important details. Objects are attached to loans in the same manner as collections, historic events and entities.

8. Managing

In addition to everything already discussed, Collective Access has a number of options which are not related directly to cataloguing and recording information about your collection. Instead, they deal with working in the system itself, grouping objects into working sets, creating new users and setting preferences for how you would like the system to operate.

a. Preferences

The manage preferences page, accessible by selecting “Manage > My preferences” in the Global Navigation Bar, edits settings that are specific to your user log-in. It contains five sub-screens, accessible through the local navigation bar, which contain options related to how you interact with the user interface, cataloguing (including language preferences), uploaded media, your preferred units of measurement and your user profile.

b. Saved Searches

View and deleted saved searches. Accessible from Manage > My saved searches. For more on saved searches, see “2.c, Finding Objects,” above.

c. Watched Items

View and delete items from watched items list. Items are added to the watched items list by clicking on the eye icon in the item’s inspector window (see “The Inspector Window” under “2.a, The Object Worksheet,” above, and Fig. 2.2). Reached through Manage > My watched items.

d. User Groups

Reached by selecting “Manage > My user groups,” this page allows you to group together a set of users. You can then configure access to sets, displays and fields. This allows you to create purpose-made and restricted access groups for specific projects.

e. Displays

Collective Access allows a large amount of control over how information is displayed in search results and in the summary page of item records. This means, for example, that you can create a display that will return not only basic information about search results, but more details such as object source, exact location, associated cultures and more. These can be used to generate detailed reports and easily answer complicated questions about your collection, and aid in inventories and exhibit planning.

	Edit	Accession Number	Name	Type	Sub-Type	Location
		1989.06.01	Chair	Rocking		Main House► Gift Shop► General Store
		1999.13.16f	Chair	Dining		Main House► Dining room
		2003.08.50	Chair	Garden		Main House► Blacksmith
		1981.08.02b	Chair	Ladder back		Main House► Small Bedroom
		1981.08.02a	Chair	Ladder back		Main House► Front bedroom
		1988.53.01	Chair	Invalid		Main House► Large bedroom
		1999.13.16b	Chair	Dining		Main House► Dining room

Fig. 8.1: The results of a search using the “location report” display to show where the objects are located.

Using Displays

Displays are used in search results and on summary screens of item records.

For Searches:

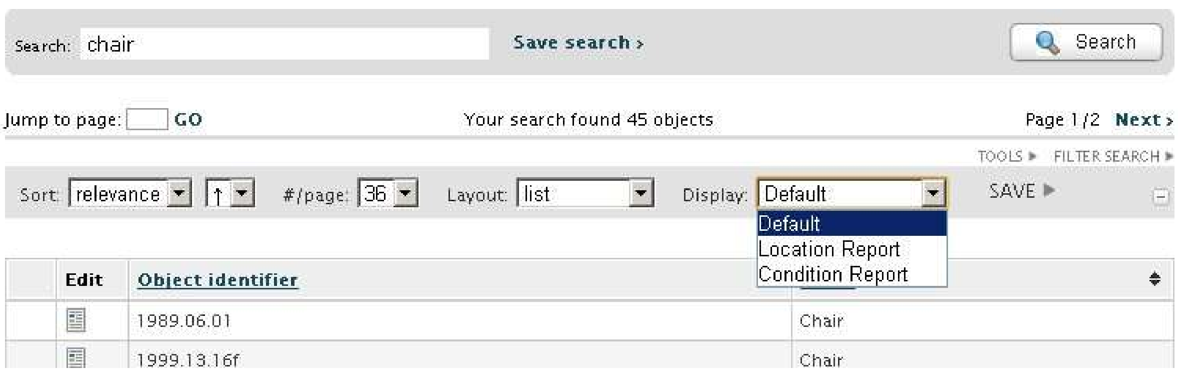

Fig. 8.2: Choosing a display for use with search results

To change the display type in search results, click on “display options” and select the display you would like to use from the drop down menu, and click “save” (see Fig. 8.2, above).

For Summaries:

Fig. 8.3: Choosing a display for use with the summary screen

To select a display to use on a record's summary screen, use the drop-down box in the top right hand side of page. After selecting, the page will update automatically.

Pre-Configured Displays

The following displays come pre-configured with the system:

Full Report (Artifact and Archival)
Best used on the summary page of the object in question. Shows all of the fields used in the object worksheet for a full, detailed report that can be printed off and stored with your records.

Short Report
Provides a quick summary of the object, including its accession number, name, type, acquisition method, title, category, description, date, source, authors or creators, history of use, military unit, vessel name, materials, measurements, location, initial condition and condition remarks.

Location Report
Best used with the results of a search. Shows the object accession number, name, type, sub-type and location.

Condition Report
Also used with searches. Shows object accession number, name, location, initial condition and condition remarks.

Research Report
Shows object accession number, name, type, location, title, relevant dates, author or maker, and description.

Entity Report
Used with entity searches and worksheets. Displays all the objects that an entity is associated with and the nature of the relationship (ie, source, author).

Adding a New Display

New displays can be created by selecting Manage > My displays from the Global Navigation bar and clicking the "New display list" button. A full YouTube tutorial on this process is also available.

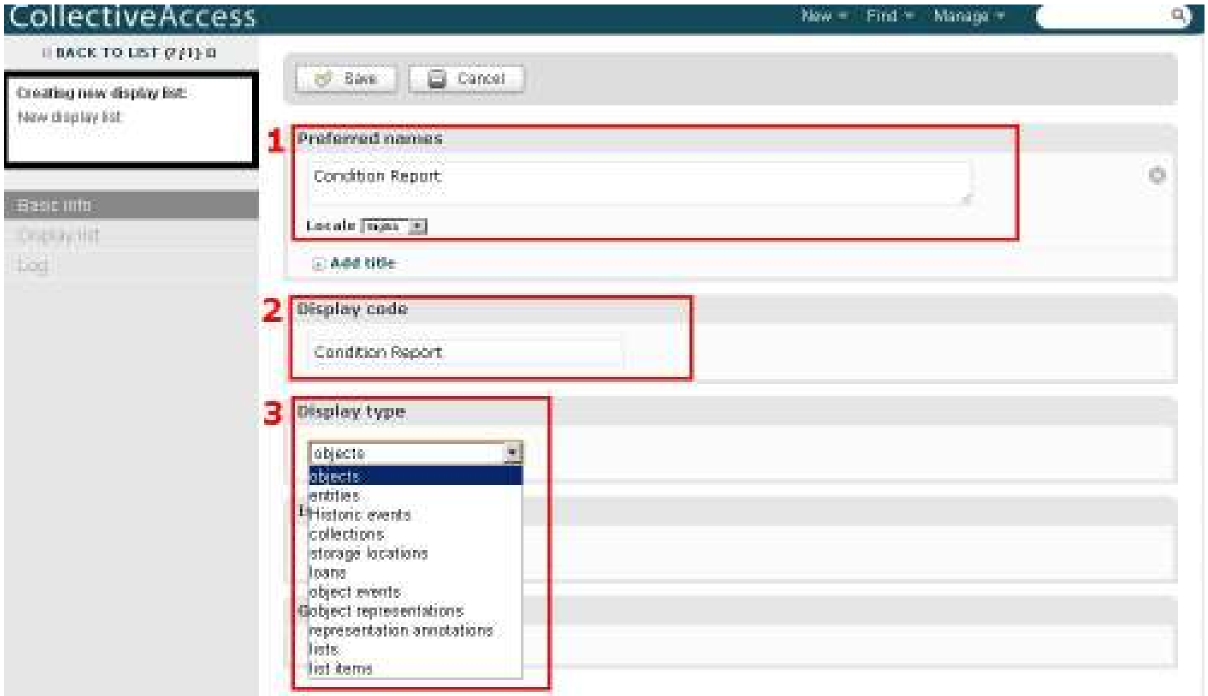

Fig. 8.4: The new display worksheet

1. Preferred Names
Preferred names can be entered in both English and French and are used to identify the display in the system.

2. Display Code
A unique identifier for the display.

3. Display Type
Determines what kinds of records the display will be used with.

After entering basic information and saving, you will be able to access the “Display list” page.

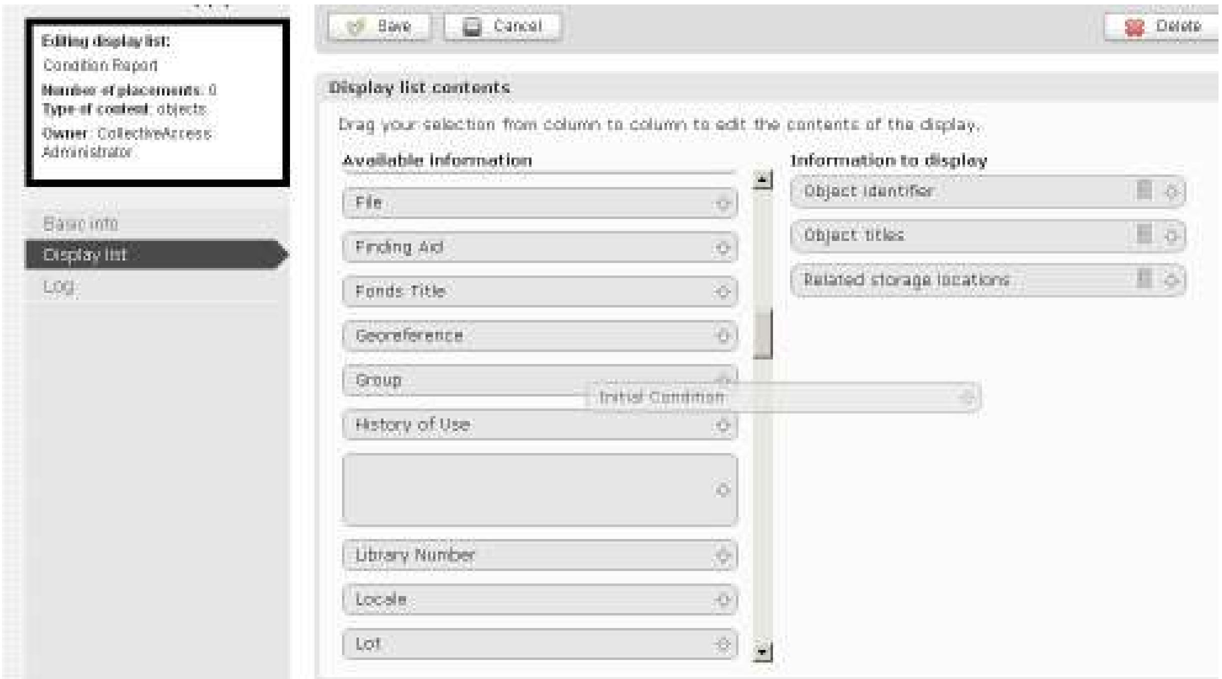

Fig. 8.5: Adding fields to a new display

The display list page is divided into two columns. The left hand side has a list of all the fields used in the database that affect your record type. In other words, if you are creating display for objects, all the fields related to objects—from accession number to culture to storage location—can be found in the left-hand column. The right hand column is where you build the display itself. To do so, click and drag all of the fields you would like to use from the left-hand to the right-hand side (see Fig. 8.5, above).

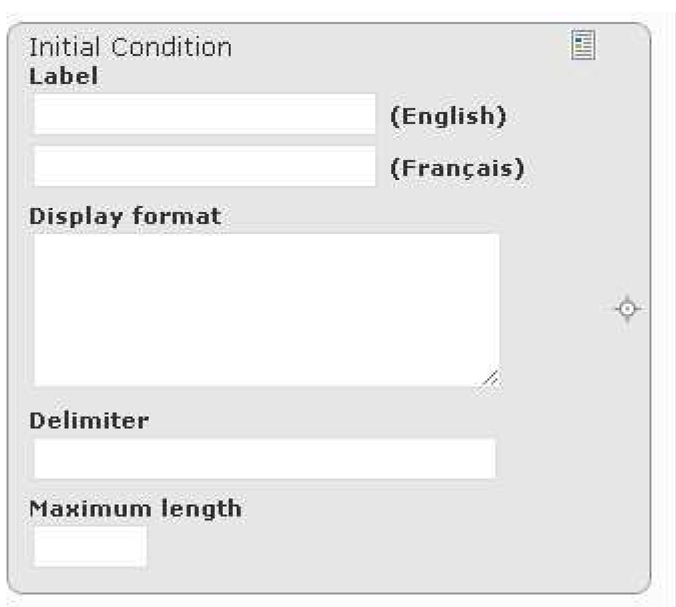

Fig 8.6: Customizing display fields

Clicking on the white edit icon allows you to customize a way that a field will display its information (see Fig. 8.6, above). Precise options vary from field to field, but typical options are label (what the field will be called in the display), display format, delimiter (what will go between multiple entries, such as a comma or a dash), and maximum length (in characters).

Some fields, especially those that draw on other worksheets such as related entities and related storage locations, have more option that allow you to filter for specific types. This means you can set up a display that will show only entities who are sources of objects, or a location report that shows only rooms.

When you are happy with your new display, click “save.” It will now show up as a usable display in search results and summaries.

f. Search Forms

Like displays, advanced search forms can be created and configured by the user. This can be used to create custom searches that only look for the information that you need. To create a new search form, select Manage > My search forms from the Global Navigation bar, and then click on the “New Form” button. You can create forms for finding objects, entities, historic events, collections, storage locations and loans.

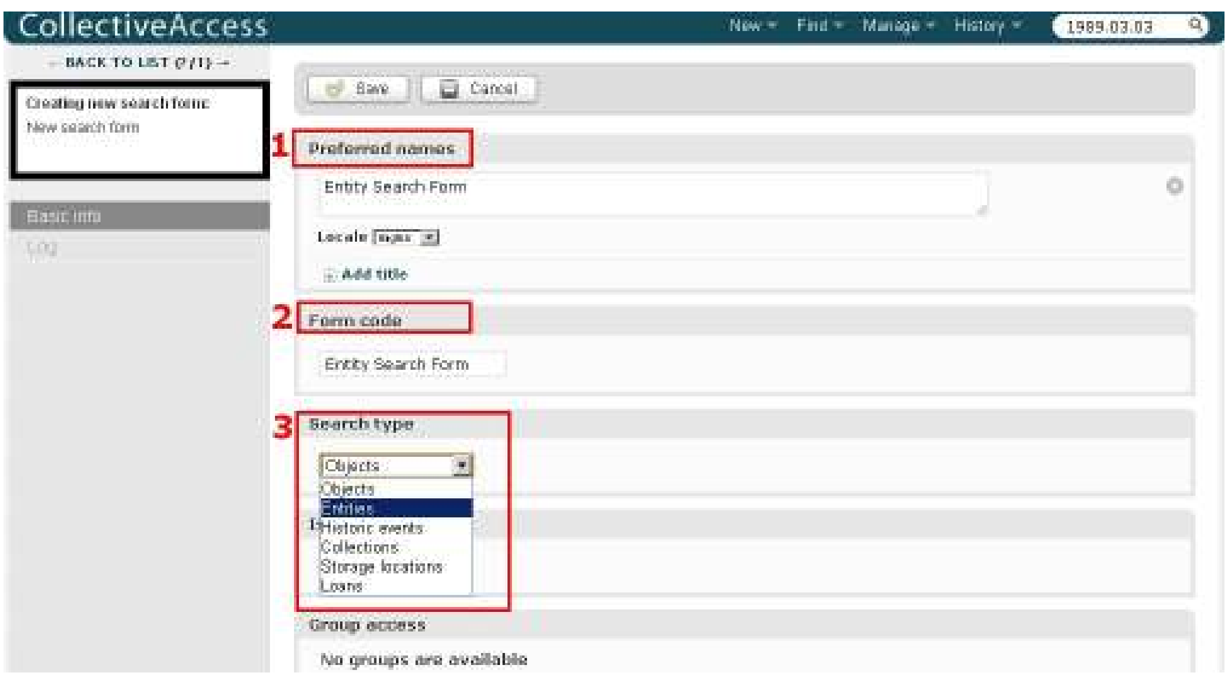

Fig 8.7: The new advanced search form worksheet

1. Preferred names

The name by which the search form will be known in the system. Allows for both English and French names

2. Form Code
A unique ID for the search form.

3. Search type
Determines whether the form will be used in object, entity, historic event, collection, storage location or loan searches.

After entering basic information about your form and saving, you will be able to begin adding search fields.

Fields are added and edited in the same manner as displays, above.

Once you are happy with your fields, click the save button. To test your search form, navigate to the appropriate find page and select your form from the drop-down (Fig. 8.8).

Fig 8.8: Testing a new search form

1. Search drop down
Lists all relevant custom search forms. Forms will update automatically.

2. Search form

3. Controls
Allows you to reset entered information or save the entered search.

g. Sets

Much like individual users can be linked together into groups, so can individual objects. Sets are informal and not intended to be collections-level groupings. In other words, sets are created for practical or administrative purposes rather than representing a formal grouping within your collection. Many organizations use Sets informally as a simple "shopping cart" for planning and brainstorming. They are also used to design online exhibits for viewing by the public on the public website.

A new set can be created by selecting Manage > My sets, and then selecting the type of set you would like to create, either a public presentation or a user set, and the type of records the set will contain—either objects, entities, historic events, collections or storage locations. To begin creating the set, click the small plus icon to the far right of the menu options (Fig. 8.9)

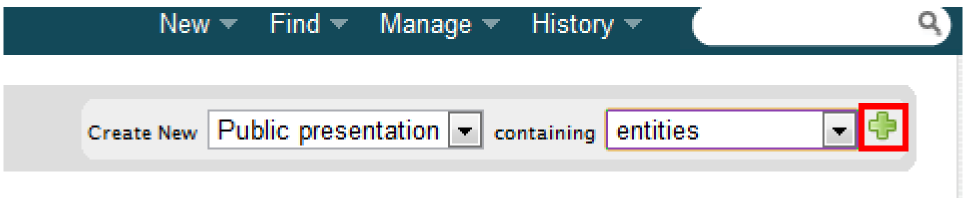

Fig. 8.9: Creating a new set

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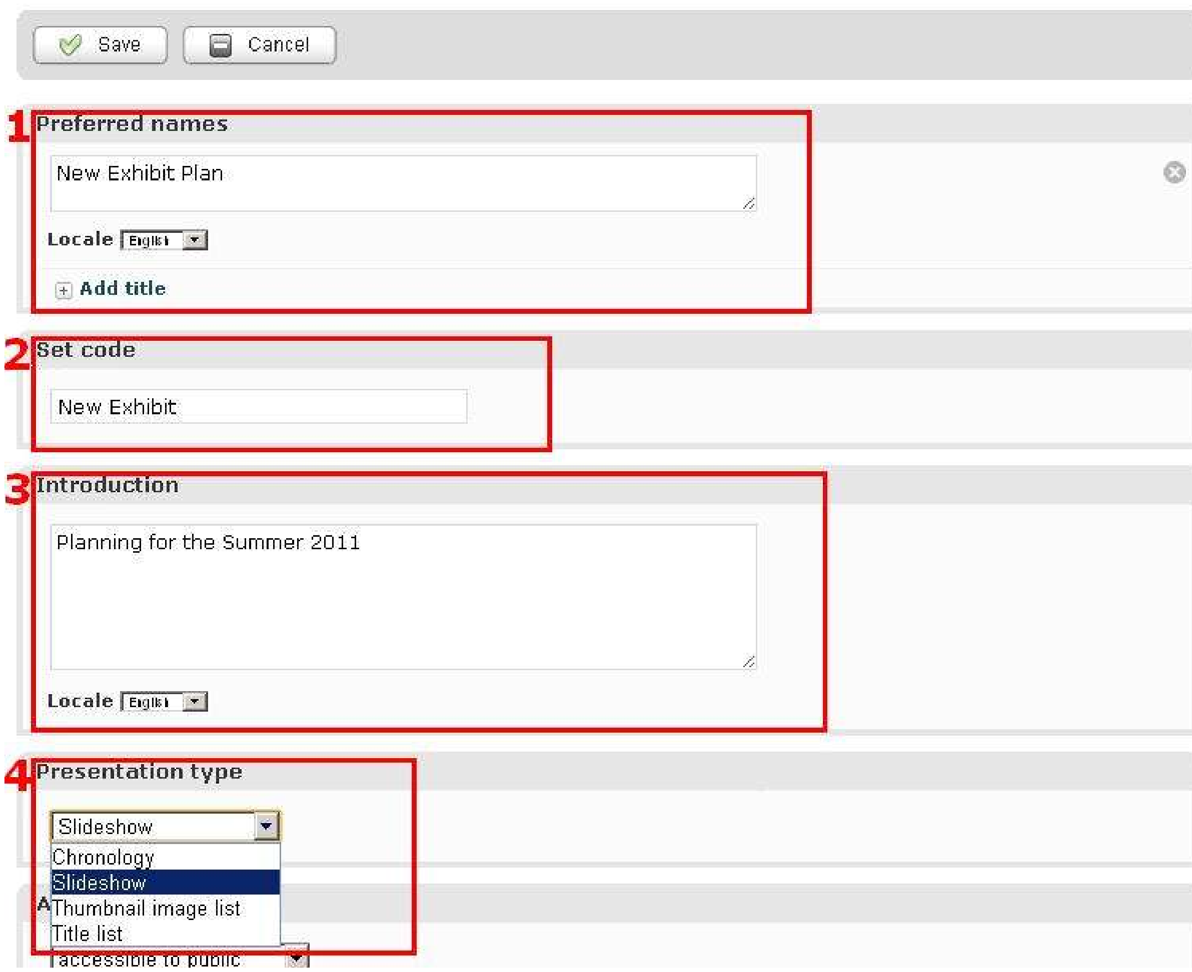

Fig 8.10: The Set Worksheet

1. Preferred Name

Your favoured name for the set. Can be entered in English and French.

2. Set Code
A unique identifier for the the set

3. Introduction
A brief description of your set. If the set is to be used on the public website, this serves as an introduction.

4. Presentation type
If the set is to be used on the public website, this drop-down menu controls how the associated media will be displayed.

You can also set public and user group access on this page.

After you have entered basic information about your set and saved, you can click on the “items” page to begin adding to your set (Fig.8.11).

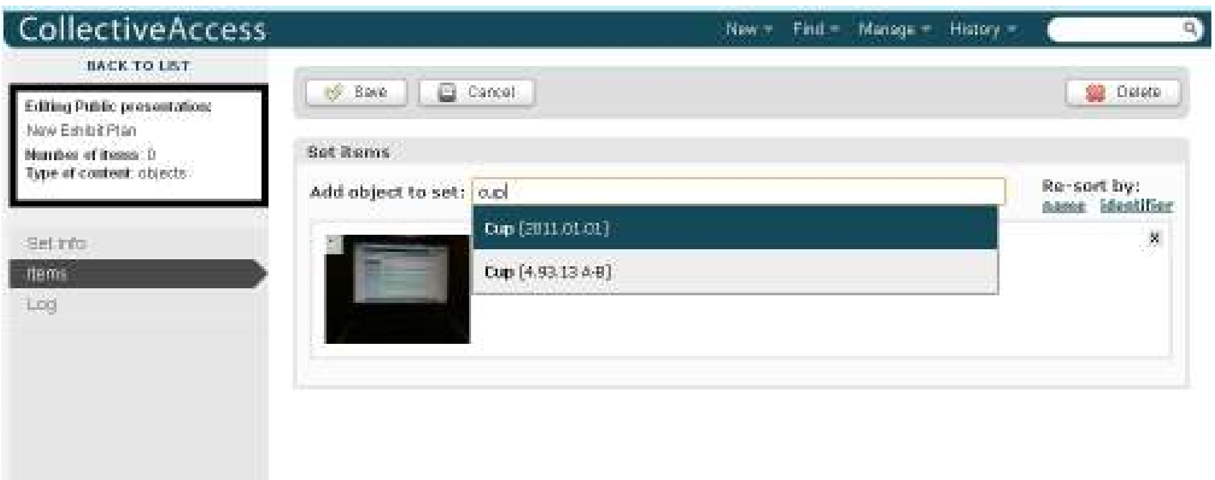

Fig. 8.11: Adding items to a set.

Items can be found by typing into the search bar. You will be prompted with relevant options. Clicking will automatically add them to a set. From here, items can be dragged and dropped to reorder. Clicking on the white page icon or thumbnail will take you to the set item worksheet, which allows you to add captions and descriptions to items.

Objects and other items can only be added to sets from the set worksheet. Once a set is created, its contents can be quickly displayed on the find page from a drop-down menu in Search Options.

h. Access Control

Reached through Manage > Access Control and only available to administrators, this page allows you to set what users have access to what parts of the site and assign different users different roles, such as cataloguers or researchers.

i. Logs

The logs page allows you to see who has been logging in and out of the database for a selected date range.

YouTube Tutorials

To help you in learning how to use the new system, ANSM has created a number of Collective Access tutorials which are available on the Association's YouTube channel.

Editing the Dashboard: http://www.youtube.com/watch?v=Xo8wGakeshM
Creating a Display: http://www.youtube.com/watch?v=1-We9wrXIHo
Adding Media and Georeferencing: http://www.youtube.com/watch?v=9BCAKQ1sWpo
Adding an Object (Basic): http://www.youtube.com/watch?v=fsF1kJfqqCg
Adding an Entity: http://www.youtube.com/watch?v=f0BUHxK7XHQ
Finding an Object: http://www.youtube.com/watch?v=_JHY3EGrw5Q