

Schoenberg Database of Manuscripts User Manual

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Recommended browser: Chrome or Mozilla

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Introduction to SDBM Entities:

The SDBM includes five entities that are essential to the organization of the database: *Entries*, *Manuscripts*, *Sources*, *Provenance Agents*, and *Names*.

Each individual entity has a unique ID number. This design allows for improved data quality and more nuanced searching and sorting within the database.

Users create ***Entries*** when they add information about a manuscript to the database from various types of sources. An entry corresponds to a single manuscript description from a single source. This could be a specific lot from a sale, an item described in a published institutional catalog or unpublished finding aid, an instance of personal observation regarding a single manuscript, etc.

Manuscript Record entities serving as linking nodes that collect entries referring to the same physical manuscript for easy access and study. Each *Manuscript Record* has its own page containing links to entries that comprise it as well as a composite provenance list.

Source entities represent the basis for the information recorded in **Entries**. All of the entries that derive from the same source are linked together via the Source record. Each Source entity has its own page containing descriptive information and links to entries that derive from it. Sources are organized into six categories: auction/dealer catalogues, collection catalogues, online-only auction or bookseller websites, personal observations, other published sources, or unpublished sources.

Provenance Agent entities are individuals or organizations that impact the history of a manuscript's possession and transmission. These include scriptoria, auction houses, dealers, collectors, university collections, etc. Each Provenance Agent record has its own page containing links to entries in which it appears.

Name entities include manuscript authors, scribes, and artists. Each Name record has its own page containing links to entries in which it appears.

Basic User Activities

Create a User Account:

1. Click **Login**, located at the top-right of the database homepage.
2. Click the **Sign Up** link at the bottom of the page.
3. **Read** through each question in the FAQ. **Confirm** that you have read it by clicking on the checkmark to the right of each question.
4. Enter your information into the data fields.
5. Click **Sign Up** to create your account.

Edit Your User Profile:

Please provide some information about yourself to help us and other users get to know you. Other users will access your profile information by clicking on your username as it appears in entries, manuscript records, or comments with which you're associated.

1. Click on your username anytime you are signed in to access the *Edit Your Profile* page.
2. Select **Edit Account**.
3. Enter your password in the **Current Password** field to confirm changes.
4. Click **Update**.

Recover Your Password:

1. Click **Login**, located at the top-right of the database homepage.
2. Click **Forgot your password?**
3. Enter your email address and click **Send me reset password instructions** to receive an email containing further instructions.

Notification Settings:

You can choose to receive a notification when certain events occur in the database. Select your desired settings on your *Edit Your Profile* page. Notifications will appear in your *Notification* page, accessed from the dropdown under your username in the top navigation bar. Emails will be sent to the address you provide in your user profile.

The notification options include:

- On Update: when one of the records you created is updated
- On Comment: when a user comments on a record you created
- On Reply: when a user replies to a comment you created
- On Message: when a user sends you a message
- On New User Registration: when a new user registers (this option available only to administrators)

Access your notifications by clicking the **Notifications** option from the dropdown menu that appears beneath your username in the top navigation bar.

User Dashboard Functions:

The dashboard is the central location for all user activities. From your dashboard, you can:

- Add a New Entry
- Manage Your Entries
- Manage Your Sources
- Manage Your Comments

- Access instructional materials and help documents

Your dashboard automatically displays:

- Recent entries you've contributed
- Recent sources you've contributed
- Recent manuscripts you've contributed
- Your recent activity (all edits contributed by you covering all record types)

To access your dashboard:

1. **Login** to your account by clicking the link in the navigation bar at the top of the page.
2. You will automatically arrive at the dashboard page.
3. Navigate to your dashboard from anywhere in the database by clicking on the **Dashboard** link in the top navigation bar.

User Comments:

All records in the database (Entries, Sources, MS Records, Names, etc.) include space at the bottom of the record for user comments. We encourage users to leave a comment anytime they have a question or concern about the data. All SDBM users can view any comment posted on a record, and respond to it if desired. The SDBM administrators reserve the right to delete any comment deemed inappropriate, and deactivate any user account that posts such comments.

Searching the Database:

You can begin searching from the homepage without logging in. However, if you search while logged in you have the ability to save your searches and bookmark specific entries. Log in before searching in order to take full advantage of the SDBM's capabilities.

Basic Search:

The basic search feature is located in the navigation bar at the top of every page. This search will query all fields in the database.

1. Enter your search term into the search box. By default, the search runs in case-insensitive mode, which means that uppercase and lowercase characters in your search term get treated the same. For example, search term "sotheby's" returns the same results as search term "Sotheby's".
2. Click **Search** to search the database.

Advanced Search:

1. Click **Advanced** to the right of the *Search* button.
2. Enter your desired search terms into the search boxes. Search terms are grouped into text fields and numeric fields.
3. To search on all the columns/fields in the database, leave *All Fields* selected in the dropdown box next to the search box. To search within a specific data field, choose it from the dropdown box. The *Match* drop-down box at the top of the search boxes allows you to specify how you want your search term to be matched. Select *All* to search the database for entries that include all of the search terms you enter. Select *Any* to search for entries that contain any of the search terms you enter.
4. To search by a full SDBM ID number, select the appropriate field from the dropdown list and enter the number using the following codes:
 - a. entry→ SDBM_number
 - i. For example, to search for SDBM entry 237255, type SDBM_237255
 - b. source→ SDBM_SOURCE_number
 - i. For example, to search for SDBM source 34590, type SDBM_SOURCE_34590
 - c. manuscript→ SDBM_MS_number
 - i. For example, to search for SDBM Manuscript Record 23721, type SDBM_MS_23721
5. By default, the search runs in case-insensitive mode, which means that uppercase and lowercase characters in your search term get treated the same. For example, search term "sotheby's" returns the same results as search term "Sotheby's."
6. Sort your search results by selecting an option from the **Sort by (term)** drop down menu at the bottom of the page.
7. Click **Search** to search the database according to the terms you entered.

Recent Additions:

1. Click **Recent Additions** to the right of the *Search* button. You will arrive at a search results page listing the most recent entries added to the database, including those contributed by other database users.

Search by Entry ID:

1. Type the complete entry ID number into the **Find Entry by ID...** search box, directly to the right of the Search box at the top of the page.
2. Click **Go!**

Sorting and Refining Search Results:

1. Sort the search results by specific columns in ascending or descending order using the **Sort by (term)** dropdown box. Entries are by default given in descending order by entry ID.
2. By default, 10 entries are listed per page. Change the number of results displayed by selecting 20, 50, or 100 in the **[#] per page** dropdown box.
3. Current search facets appear individually at the top of the search results page. Remove any facet by clicking the **X icon** next to its name.
4. Additional search facets appear in the left column of the search results page. Click on a facet to add it to the current search criteria. Facets are numerically sorted in descending order by number of instances. Click **more>>** at the bottom of each list to reveal the complete list of facets. From this page, you can change the sorting method and view additional facets.
5. To enter your own additional facets, click **Advanced Search** at the top of the screen to open the Advance Search page, where you can type in additional search terms.

Save Your Searches:

1. **Login** to your personal dashboard.
2. **Search** for entries.
3. Click the **History** link, located in the **My Searches** menu in the top horizontal navigation.
4. Click the **save** button next to each search you wish to save.
5. To view your saved searches, click the **Saved Searches** link located in the **My Searches** in the top horizontal navigation.

Bookmarks

Create a Bookmark:

1. **Login** to your personal dashboard.
2. **Search** for entries.
3. Click the **Bookmark** tab at the top-right of an entry's description.
4. To view your bookmarks, click the blue **Bookmarks tab** located in the top right corner of any page on the database. This tab appears any time you are signed in.

Manage Your Bookmarks:

1. **Login** to your user account.
2. Click the **Bookmarks tab** located in the top right corner of your screen.
3. Bookmarks are organized by entity type (Entry, Manuscript, Name, Source)
4. To filter your bookmarks based on a specific tag, type the tag into the **Filter By Tag** box in the bottom left corner of the window. To remove the filter, clear the **Filter By Tag** box and press **Enter** on your keyboard.
5. To delete a bookmark, click the **X icon** in the top right corner of the bookmark.

Tag Your Bookmarks:

1. **Login** to your user account.
2. Click **Bookmarks tab**.
3. Click the **green Add Tag** icon located in the bottom left corner of the bookmark you wish to tag.
4. Type your desired tag into the text box.
5. Click the **+ sign** to add your tag to your bookmark. You will see the tag listed in the **Tags** section of the bookmark.
6. Click the **x** next to your tag to remove it from the bookmark.

Data Entry

Quick Start Guide for Data Entry:

1. **Login** to your personal dashboard.

2. Click **Add New Entry** under the *Data Entry Tasks* menu on your dashboard page.
3. Identify the Source for your data by either:
 - a. Selecting a pre-existing source in the database
 - b. Creating and describing a new source
4. After you identify your source, you will arrive at a form for creating a new entry, with your source information automatically entered.
5. Fill in as many of the data fields as you can, based on the information provided in your data source. Each data field has its own content standards. **Click on the question mark** next to a field label to open a pop-up window that describes the content standards for that field. You can also find these standards in the Data Dictionary.
6. Click **Save**. Your data is now saved and sent to administrators for approval.

Quick Start Guide for Managing Your Entries:

1. **Login** to your personal dashboard
2. Click **Manage Yours Entries** under the *Data Entry Tasks* menu on your dashboard page.
3. You are now on the Manage Entries page. **Search** for the entry you want to edit via the search options at the top of the page.
4. Once you find the entry, click **Edit** under the *Actions* options, located in the first column of the search results.

Fundamentals for Data Entry:

- Always consult the content standards for each field before you enter data. These can be found in the Data Dictionary or by clicking on the question mark next to a field label to see a pop-up window with the field definition.
- Record data entered into *As Recorded* fields EXACTLY as given in the data source, including spelling errors, word order, incorrect information, etc. The purpose of these fields is to preserve the data of the source material, because the source material is historical evidence in its own right.
- If in doubt, email the database administrators for help.

Enter New Data:

1. Login to your account from the Homepage by clicking **Login** at the top-right of the screen.
2. Click the **Add New Entry** link under the *Data Entry Tasks* box, located within the left navigation pane of your personal dashboard page.
3. The *Add an Entry – Identify the Source* page will appear. Identify the data source for the entry or entries you intend to enter. Enter information about your source into the fields (*Source Date, Selling Agent or Institution/Collection, and Source Title*). Existing sources in the database that match your source will appear at the bottom of the page.
 - a. If you see your source listed in the search results, **click on it**. You will arrive at the *Add an Entry* screen with the source information automatically populated into your new entry. Skip ahead to Step 5 for further instructions on creating a new entry.
 - b. If your source does not appear in the search results once you've exhausted all possible search terms, your source does not exist in the database yet. Click **Create A New Source** to add the source to the database.
 - i. On the *Create a New Source* page, **select your source type** from the drop-down menu. Definitions for each source type are shown on this page. You can also refer to the Data Dictionary for full source type descriptions. Once you select a source type, additional data fields will appear on the screen.
 - ii. **Enter data** about your source into the available fields. Click on the question mark next to a data element name for a definition, or refer to the Data Dictionary for full element descriptions.
 - iii. Click **Save** to save your source. After saving a pop-up window will appear with several options about how to proceed.
 - iv. Or, if you decide not to enter your source, click **Cancel** to return to the *Add an Entry – Identify the Source* page. All information typed into the *Create a New Source* page will be lost.
4. Once you select a source or create a new one, you will be directed to the *Add an Entry – Fill Out Details* page. Details about your data source will automatically be included with your entry.
5. Fill in as many of the data fields as possible, given the information provided in your source. Click on the question mark next to a data element name, or refer to the Data Dictionary, for full element descriptions.
6. Click **Save** to add your entry to the database.
 - a. Once you save your entry, several options will automatically appear regarding your next action. You can:
 - i. Add another entry from this source
 - ii. Take a break from entering this source; return to my dashboard
 - iii. The source is completely entered; return to my dashboard
 - iv. Go to other entries for this Source
 - v. Return to editing this entry

7. Or, if you decide not to save your entry, click **Cancel** to return to your dashboard. All information typed into the *Add an Entry – Fill Out Details* page will be lost.

Standardized Data Value Entry

Lookup tables govern certain fields. The purpose of the lookup table is to maintain consistency in spelling and naming conventions. The lookup tables contain standardized names or phrases that are used as a data entry guide. Common misspellings are avoided because these tables will suggest existing values in a dropdown box of suggestions that appears when you begin typing. There are lookup tables for the following fields: *Artist, Author, Buyer, Provenance Agent, Language, Place, Scribe, Seller, and Selling Agent*. The SDBM Name Authority governs the lookup tables for personal and corporate names.

When adding new data into a field governed by a lookup table, start by typing in the first letters of the value. The lookup table will generate a list of possibilities for you to choose from. If you do not see a suggestion, try typing other possible values, such as variant spellings or different word order for multi-word values.

For example, if a catalogue gives Jean Bourdichon as an artist, you would type in "Jean", and a list of several names including the name with Jean will appear below. Click on the appropriate name, in this case "Bourdichon, Jean", and it will automatically be entered.

If no value for your data appears in the lookup table, create a standard value by clicking the **>>Propose New ...** option, which appears automatically as the first suggestion in the lookup table.

Create a Standard Data Value

- Click **>>Propose New...**, the button located in the left corner in the lookup table. A pop-up window will appear.
- Enter a new standard value in the **Name** field. Follow the instructions provided in the Data Dictionary for content standards.
- Fields that include personal and corporate names have additional options:
 - Click **Find Suggestions in VIAF** to search VIAF for possible standard names.
 - In the search results, click on the VIAF ID number to link to the name's VIAF authority page.

- Click **Use this info** to auto-fill the name's information into the data fields.
- Enter any additional information you can provide about the standard value in the **Comments** field.
- Click **Create** to save the new standard value in the database.

Please search all possible ways of spelling or entering names in the lookup tables, especially if you are entering a name, location, or language that should already be in the database. This step is crucial to maintaining clean data.

Expressing Data Ambiguity

The fields governed by standardized data values also include options for expressing ambiguity in the data. To the right of the field, a button displaying a checkmark automatically appears. By clicking on the button, you can change the icon it displays to reflect three different circumstances:

- Checkmark = the source contains the information
- Question mark = the source expresses doubt about the information
- Asterisk = you (the person entering the data) are providing the information, based on a strong inference. You can further explain your reasoning in the *Other Information* field, if you desire.

Editing Entries in the SDBM

Sources that describe manuscripts—auction and sale catalogs, collection catalogs, websites, etc.—are historical evidence in their own right. The SDBM seeks to preserve the integrity of its data sources. When entering data, users should record the information as given in a data source, even if they believe some of the information is incorrect. If a user believes a data source provides incorrect information, they should describe their reasoning in the *Other Information* field for that entry.

If you come across an entry that you think contains incorrect information, **DO NOT CHANGE THE DATA**, unless you can consult the source for that entry and confirm that the error resulted during transcription.

What to Do When You Find a Data Error in the SDBM:

If you notice an error in the SDBM, add a comment describing the error on that page. Commenting allows you to participate in the ongoing effort of describing and studying manuscripts by creating a dialogue about the data in the SDBM.

You can also email the SDBM administrators anytime you have questions or concerns about the database at: sdbm@upenn.edu.

Remember that the SDBM reproduces the data exactly as it is given in the **Source** material. The SDBM does not make any objective statements about the reality of the manuscripts. Descriptions of manuscripts change over time, just as scholarship changes. By preserving these inconsistencies, the SDBM reflects and captures the changing nature of manuscript studies across time.

Manage an Existing Entry:

1. **Login** to your personal dashboard.
2. Click **Manage Your Entries** under the *Data Entry Tasks* options.
3. You are now at the Entry Manager.
4. **Search** for the entry you want to edit.
5. Click **Edit** under the *Actions* column (the first option in the first column of the search results).
6. Perform your edits, and click **Save**.

The Manuscript Record:

Descriptions of the same manuscript will appear in a variety of sources. For example, one manuscript may appear in several different auction catalogues as it is bought and sold over the years. By linking together the entries from those auctions that describe the same manuscript, you help users quickly locate all available data on that manuscript in the SDBM.

The linking tool allows you to link together **Entries** that describe the same physical manuscript. Linked entries constitute a **Manuscript Record**, which has its own SDBM ID number and information page. Linking entries facilitates provenance research, and is an essential task for every database user. **Always search for links for every entry you create.** You may not always find a link for your entry. You will have the option to immediately search for links after saving a new entry (in this case, skip to Step 3 of the instructions below). If you link your entry to other entries that have already been linked, your entry will automatically be added to that

Manuscript Record. If you link your entry to other entries that haven't been linked to before, you will create a new Manuscript Record.

Link an Entry to a Manuscript Record:

1. **Login** to your personal dashboard
2. Locate the entry you want to link.
3. The linking tool consists of two windows: an entry queue in the top half of the page, and a search queue in the bottom half of the page. Use the search queue to search the database for entries that describe the same manuscript as your initial entry.
4. Click **Add to queue** next to entries you think should be linked to your initial entry. As you add entries from the search queue to the entry queue, they will appear alongside your initial entry in the entry queue at the top of the page.
5. Once you add an entry to the entry queue, you will have two possible options:
 - a. Select whether the entries represent full links, fragments, or possible links by clicking on the radio buttons in the far left column of the search results.
 - i. Select **Link** for entries that describe the same manuscript.
 - ii. Select **Fragment** for entries that describe fragments of a manuscript. Fragmented manuscripts are most obvious by sharing many manuscript details with their linked entries except for such key indicators as folio count and the most complete Title listings.
 - iii. Select **Possible** if you are unsure whether the entry describes the same manuscript
 - iv. Select **Unlink** to remove the entry from the entry queue. This will unlink the entry from a manuscript record.
 - b. Entries already linked to a Manuscript Record will have no radio buttons. Instead, you will see a **Link to SDBM_MS** link located under the *Options* column of the search results. When you click this link, your entry will automatically be linked to that Manuscript Record. A pop-up window will appear offering to redirect you to the linking tool for that Manuscript Record.
6. Click **Create Manuscript Record** to link the entries you've selected to a new Manuscript entity.

Tools Within the Manuscript Record:

1. Click **Cite** to generate a citation of this manuscript record. A pop-up window will appear.

2. Click **Linking Tool for SDBM_MS** button to open the linking tool for the Manuscript Record. The Linking Tool allows you to link other entries to the Manuscript Record. For further instructions, consult the Linking Tool section of the user manual.
3. Click the **Construct History** button to open the Construct History Workspace, described in the next section.
4. Click **Bookmark** to add this Manuscript Record to your Bookmarks.

Construct a Provenance History:

This tool allows you to suggest a provenance history for this manuscript record by creating a new personal observation based on the provenance data aggregated in the manuscript record.

1. Click the **Construct History** button to open the Construct History Workspace. The tool will appear in a new column directly to the right of the Entry Provenance fields. To close the Construct History tool, click the – **sign** in the top right corner of the tool.
2. **Click and drag** a provenance agent from the Entry Provenance column into the Construct History workspace. Arrange provenance agents in chronological order, beginning with the earliest.
3. To reorder agents within the Construct History column, **click and drag** an agent to the appropriate position in the list. The other agents will automatically reposition themselves to make room for the moved agent.
4. Click the **Clear** button to remove all current agents from the Construct History column.
5. Click the blue **Create** button at the bottom of the Construct History tool to save your work. This action creates a new Personal Observation entry, and automatically links it to the Manuscript Record. To add manuscript details once the new entry is created, click **Edit** in the Tools window.

Manages Manuscript Links:

You can manage the entries linked to existing manuscript records via the Manuscript Record Linking Tool. This linking tool looks very similar to the linking tool for entries (see page 13), but there are several major differences between the two. The Manuscript Record Linking Tool manages a manuscript record that already exists. The entry queue in the top half of the screen is auto-populated with the entries already linked to that manuscript record. The search queue in the bottom half of the screen only includes one option: **Add this entry to manuscript record**. This is in sharp contrast to the Entry Linking Tool used for entries, where the top queue is not auto-populated, and you are given the option to link to an existing

manuscript record or to create a new manuscript record. When using either of the linking tools, be sure to double-check that you are utilizing the correct tool for your desired task. The Manuscript Record Linking Tool will display an SDBM_MS_ID number at the top of the screen (manuscript record ID number); the Entry Linking Tool will display an SDBM_ID number (entry ID number).

1. Locate a manuscript record to which you want to link an entry. You can do this by searching the database and clicking on any SDBM_MS ID number.
2. Click **Linking tool for SDBM_MS_XXXXX** under the *Tools* menu in the manuscript record.
3. You are now at the Manuscript Record Linking Tool for the manuscript record you've chosen. The entry queue at the top of the screen is auto-populated with entries already linked. **Search** the database for other entries describing the same manuscript by utilizing the search queue in the bottom half of the screen.
4. When you find an entry you wish to link, click **Add entry to manuscript record** under the *Actions* column at the far left of the search queue.
5. Select whether the entries represent full links, fragments, or possible links by clicking on the radio buttons in the far left column of the search results.
 - a. Select **Link** for entries that describe the same manuscript.
 - b. Select **Fragment** for entries that describe fragments of a manuscript. Fragmented manuscripts are most obvious by sharing many manuscript details with their linked entries except for such key indicators as folio count and the most complete Title listings.
 - c. Select **Possible** if you are unsure whether the entry describes the same manuscript.
 - d. Select **Unlink** to remove an entry from the entry queue. This will unlink that entry from the manuscript record. **WARNING:** Please use extreme caution when unlinking entries from manuscript records. Only unlink an entry when there is clear, definitive evidence that the entry does not describe the manuscript in question. If you have doubts about whether an entry belongs with the manuscript record, add a comment to the Manuscript Record, rather than unlinking the entry.
6. Click the **Save Changes** button at the top of the entry queue once you are satisfied with your changes.

General Management Tables

All database users can manage their Sources, Manuscripts, and Comments by accessing the management tables for these records. Links to these tables appear within the *Data Entry Tasks* menu on your dashboard.

Manage Your Sources:

1. Click the **Manage Your Sources** link under the *Data Entry Tasks* menu on your dashboard.
2. You are now at your Source Management page. From the *Options* column at the far left of the screen you can **Edit** or **Delete** sources you have added to the database, as well as add a new entry to a source by clicking the **Add an Entry** link.

Manage Your Manuscripts:

1. Click the **Manage Your Manuscripts** link under the *Data Entry Tasks* menu on your dashboard.
2. You are now at your Manuscript Management page. From the *Options* column at the far left of the screen, you can **Edit** or **Delete** manuscript records you have created in the database.

Manage Your Comments:

1. Click the **Manage Your Comments** link under the *Data Entry Tasks* menu on your dashboard.
2. You are now at your Comment Management page. From the *Options* column at the far left of the screen, you can **Edit** or **Delete** any comment you have created in the database.

Administrative Management Tables

Users with administrator privileges can access management tables that govern Links, Names, Languages, Places, and Users. These tables allow you to perform a variety of actions on these special records, and also contain enhanced search capabilities. If you are an administrator, you will see an *Admin* menu on your dashboard that contains links to these tables. The special search facets and modifiers for these tables are described below. Keep in mind that not all facets and modifiers will be available in each table. Instructions for the individual tables appear in the subsequent sections of this user manual.

Search Facets in Management Tables

1. **Created by:** the user who created the record
2. **Updated by:** the user who last updated the record
3. **ID:** the unique SDBM ID number for this record
4. **VIAF:** the VIAF number linked to this record
5. **Authors count:** the number of times this record appears as an author
6. **Artists count:** the number of times this record appears as an artist
7. **Scribes count:** the number of times this record appears as a scribe
8. **Provenance count:** the number of times this record appears as a provenance agent
9. **Source agents count:** the number of times this record appears as a source agent
10. **Created on:** the date this record was created
11. **Updated on:** the date this record was last updated
12. **Username:** the username of the user record
13. **Fullname:** the full name of the user
14. **Email:** the email address of the user
15. **Role:** the permission level of the user (contributor or administrator)
16. **Active:** whether a user has added data or not

Modifiers in Management Tables

These modifiers affect the field corresponding to the facet selected from the preceding drop-down menu in the search:

1. **Contains:** contains term entered in search field.
2. **Does not contain:** does not contain term entered in search field.
3. **Blank:** disables search field; field is blank.
4. **Not blank:** disables search field; field is not blank.
5. **Before:** data in field numerically or alphabetically precedes term entered in search field.
6. **After:** data in field numerically or alphabetically succeeds term entered in search fields.
7. **Equals:** data in field exactly matches term entered in search field.
8. **Does Not Equal:** data in field does not match term entered in search field.
9. **Less than:** data in field is less than the term entered in the search field.
10. **Greater than:** data in field is greater than term entered in search field.
11. **Near:** data in field approximates to term entered in search field.
12. **Exact:** data in field exactly matches term entered in search field.

Manage Links:

1. Click the **Manage Links** link under the *Admin* menu on your dashboard.
2. You are now at the Manage Links page. From the *Options* column at the far left of the screen you can **Edit** links. Clicking the **Edit** button will open the linking tool for that Manuscript Record.
3. **Search** for specific links via the Search box at the top of the screen.
 - a. **Toggle** through the data field options to the right of the search term box. The drop-down menu allows you to specify which field you want to search.
 - b. **Modify** your search using the options to the right of the data field options.
4. Click the **+add term** button to add additional search terms. Choose whether the results will include **all** or **any** of your search terms using the menu to the left of the search button.
5. Click **Search** to perform your search.

Manage Names:

1. Click the **Manage Names** link under the *Admin* menu on your dashboard.
2. You are now at the Manage Names page. From the *Options* column at the far left of the screen you can **Edit** names, **Delete** names, and **Merge** names with other names.
3. **Search** for specific names via the Search box at the top of the screen.
 - a. **Toggle** through the data field options to the right of the search term box. The drop-down menu allows you to specify which field you want to search.
 - b. **Modify** your search using the options to the right of the data field options.
4. Click the **+add term** button to add additional search terms. Choose whether the results will include **all** or **any** of your search terms using the menu to the left of the search button.
5. Click **Search** to perform your search.

Manage Languages:

1. Click the **Manage Languages** link under the *Admin* menu on your dashboard.
2. You are now at the Manage Languages page. From the *Options* column at the far left of the screen you can **Edit** or **Delete** languages.

3. Search for specific languages via the Search box at the top of the screen.
 - a. **Toggle** through the data field options to the right of the search term box. The drop-down menu allows you to specify which field you want to search.
 - b. **Modify** your search using the options to the right of the data field options.
4. Click the **+add term** button to add additional search terms. Choose whether the results will include **all** or **any** of your search terms using the menu to the left of the search button.
5. Click **Search** to perform your search.

Manage Places:

1. Click the **Manage Places** link under the *Admin* menu on your dashboard.
2. You are now at the Manage Places page. From the *Options* column at the far left of the screen you can **Edit** or **Delete** places.
3. **Search** for specific places via the Search box at the top of the screen.
 - a. **Toggle** through the data field options to the right of the search term box. The drop-down menu allows you to specify which field you want to search.
 - b. **Modify** your search using the options to the right of the data field options.
4. Click the **+add term** button to add additional search terms. Choose whether the results will include **all** or **any** of your search terms using the menu to the left of the search button.
5. Click **Search** to perform your search.

Manage Users:

1. Click the **Manage Users** link under the *Admin* menu on your dashboard.
2. You are now at the Manage Users page. From the *Options* column at the far left of the screen you can **Edit** users.
3. **Search** for specific users via the Search box at the top of the screen.
 - a. **Toggle** through the data field options to the right of the search term box. The drop-down menu allows you to specify which field you want to search.
 - b. **Modify** your search using the options to the right of the data field options.
4. Click the **+add term** button to add additional search terms. Choose whether the results will include **all** or **any** of your search terms using the menu to the left of the search button.

5. Click **Search** to perform your search.

Exporting Data:

Users can export data in the form of .csv files from their Bookmarks and Manage Tables.

Exporting Bookmarks:

1. Open your **Bookmarks tab**.
2. Click **Manage Bookmarks** at the bottom of the Bookmarks window.
3. Click the blue **Export to CSV** link located on the left side of the screen, directly beneath each record type.
4. A blue notification will appear on the screen when the file is being prepared.
5. A green notification will appear on the screen when the file is ready.
 1. Click the **blue download** link within this notification to download the file.
6. To view your exported files, navigate to your **Exports** page. Choose the Exports option from the dropdown menu beneath your username in the top navigation bar.

Exporting Data from Manage Tables:

Your Recent Activity:

Records of your most recent activity appear on the lower portion of your user dashboard. Click the blue **See More...** link at the bottom of the Recent Activity section to open the full Recent Activity page.

Filter the Recent Activity Page:

1. Search the activity of a specific user by typing a **username** into the search term box.
2. Choose the **Action** from the dropdown menu next to the search term box. Possible actions include an **Edit**, **Addition**, or **Deletion** of data from the database. Leave the type as **Action** to search all actions.

3. You can further modify your search by specifying the **Type** of entity on which the Action was performed. Choose from **Entry, Name, Source, Language, Place, or Manuscript**. Leave the default selection as **Type** to search all entities.
4. Specify a date range for your search using the **Date Range** boxes. The default range appears automatically, and includes all actions performed in the history of the database.
5. Click the blue **Filter** button to apply your search term and facets. The Recent Activity list located below the search bar will be filtered to include only your search.
6. Click the yellow **Clear** button to reset the search to its default settings.

Special Functions

This section describes advanced functions that are possible within the database. Only administrators can perform these actions.

Merge Records:

1. Open either the Manage Sources or Manage Names pages, located on your dashboard.
2. Click the blue **Merge** button for the record you wish to merge. This button is located under the *Options* column within the table.
3. Select the record you wish to merge with your initial record. To do this, either:
 1. Choose one of the suggestions automatically generated by the database.
 2. Enter the SDBM_ID number into the box above the suggestions.
 3. Open your **Bookmarks tab** from the Merge screen. Select the blue **Merge** button next to the appropriate bookmarked record to import that data into the Merge screen.
4. The next screen shows the two records you selected side by side. The record on the left side of the screen will be merged into the record on the right side. Swap the positions of the records by clicking the **Swap** button.
5. Copy over any fields in the old record that you wish to preserve in the merged record. Type the desired data into the fields of the correct record on the right side of the screen.
6. If you do not wish to merge these two records, click **Cancel** to return to the previous screen.
7. If you are certain the two records you selected should be merged, click **Yes** to merge the records. The record on the left side of the screen will be deleted.

Deprecate an Entry:

1. Click the **Manage Entries** link under the *Data Entry Tasks* section of your dashboard.
2. Choose the **Deprecate** option for the entry you wish to deprecate. This button appears under the Action column within the table. A pop-up window will appear.
3. Type the **SDBM_ID number** of the entry that should supersede the deprecated entry into the data field.
4. Click **Deprecate**. The entry is now deprecated, and will not appear in any search results.

Verify an Entry:

Entries imported from the previous SDBM into the New SDBM on October 15, 2015 may contain data flaws, due to incompatibility with the new data model or because data entry did not conform to current data entry standards. A red warning label appears at the top of these legacy entries. We advise users to verify data with the identified source when possible. Once a user confirms the accuracy of an entry's data, that user may **Verify** that entry in the database. This will remove the warning label from that entry. Only users at the Editor level and above may verify entries.

Entries may only be verified when a user consults the associated source and confirms that all data in the entry has been recorded according to the current SDBM data standards.

To verify an entry:

1. **Search** for the entry you wish to verify.
2. **Click** on the entry's SDBM_ID number to open its public view page.
3. Select the **Verify** option located within the *Tools* menu on the entry's public view page. This option will only appear on records that are unverified, and for users that are at the Editor level or above.
4. The entry is now verified. The red warning label at the top of the entry disappears.