CA COLLECTIVE ACCESS

User Manual

Association Heritage New Brunswick

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# Chapter 1: Accessing and Navigating the Database

**Accessing the Database**
CollectiveAccess is a web-based platform that may be accessed from any current web browser. (Chrome, Firefox, Safari or Internet Explorer 10 or better). Multiple users can work in the database simultaneously without worrying about overwriting each other's work or creating incompatible versions of collections data.

## 1.1 Logging In

Logging in to CollectiveAccess requires a username and a password supplied by the system administrator. To log into the system, launch your web browser and go to your system's URL (also provided by the system administrator). Enter your username and password into the login form (Fig 1.1)

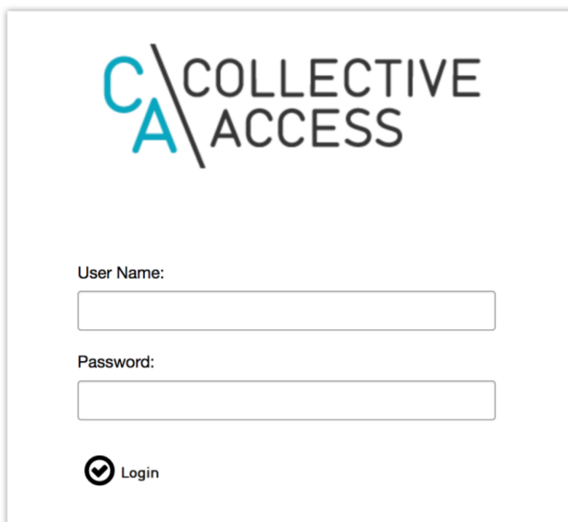



Fig 1.1: Logging into the Database

Access to various functions can be controlled per login. After logging in you will only see the functions for which you have access. If you cannot find or perform a specific action check with the system administrator to verify the privileges for your login have been set correctly.

## 1.2 The Dashboard

The customizable dashboard (Fig. 1.2) is the first thing you see after logging into the system. This is your home page in CollectiveAccess, and the changes you make to it are visible only to you. You can return to the dashboard at any time by clicking the CollectiveAccess logo in the upper left-hand corner of your screen.

The main function of the Dashboard is to display the widgets for your system. Widgets provide specialized functions and serve as mini-applications within the application. You can include as many or as few of them as you wish and arrange them at will on the dashboard.

Consult the "Available Widgets" section below for a list of dashboard widgets.

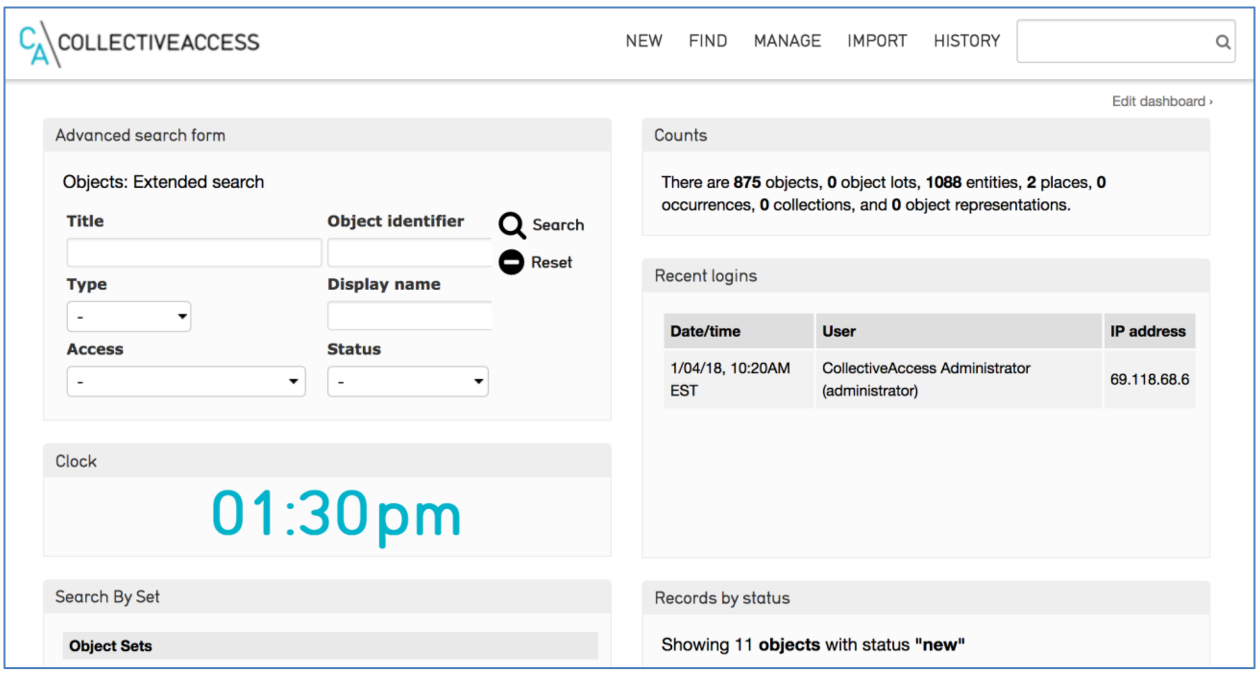



Fig 1.2: The Dashboard

**Top Logo**

Clicking the logo in the upper left-hand corner of the browser window will always return you to the dashboard. It is available at all times, in all areas of the system. Other persistent tools are arrayed along the top of the browser window to the right of the logo, including system menus used to navigate within CollectiveAccess and the QuickSearch tool. These are described in detail in section 1.3.

**Edit Dashboard Button**
The “Edit Dashboard” button allows you to add, move or delete widgets. Widgets are mini-applications that provide useful (and occasionally humorous) information or functionality. Example CollectiveAccess widgets include *Recent Changes* (displays recent changes to specific types of records), *Counts* (displays the number of records by type), *Recent Logins* (lists who has logged in recently) and *LolKatz* (displays an ever changing gallery of funny cat photos grabbed from the internet!). See Available Widgets below for a complete list.

**Clear Dashboard**
Clicking this button will remove all widgets from your dashboard.

**Add Widget**
Clicking the “Add widget” button will list all available widgets for inclusion on your dashboard. Once a widget has been added you may drag and drop it into place anywhere you like. Clicking “Done” will save your dashboard changes. Widgets may only be added/removed or moved around the dashboard while in editing view.  Widget settings are accessed by clicking the settings information icon at the top of each widget while in editing view.

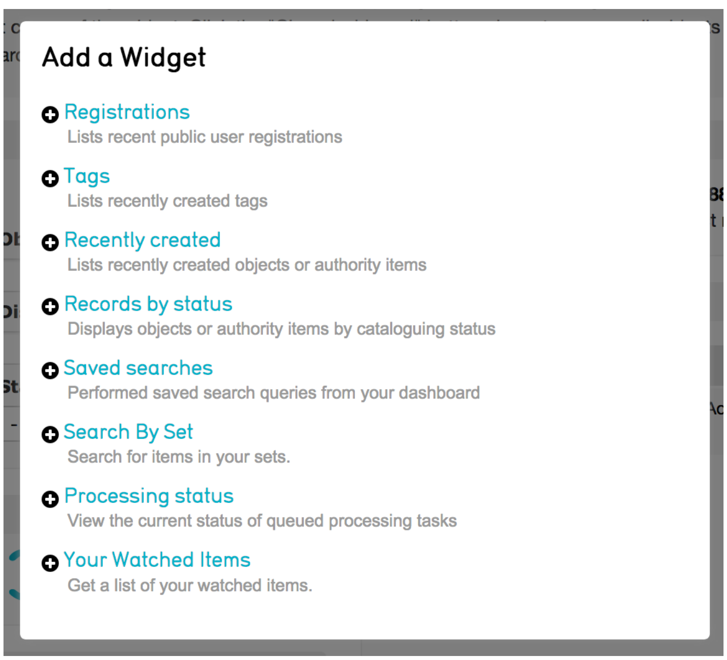



Fig 1.3: Widget menu

**Available Widgets (an Administrator would see all od these, a Cataloguer would have fewer options available)**

- ***Advanced Search Form*** – Displays one of the Advanced Search forms you have configured for your system. Click the settings information icon to choose the form you wish to display.

- ***Clock*** – Displays the current time.

- ***Counts*** – Shows the current count for each type of record in your system. Settings allow you to choose which record types to display.

- ***Recent Logins*** – Shows the login activity of your users. Edit the settings to change the time frame for which you would like to see login activity.

- ***Links*** – Displays shortcuts to external project and reference websites.

- ***lol Katz*** – Displays a random lolcat image.

- ***Message of the Day*** – Displays your desired text.

- ***Notifications*** – Displays notifications.

- ***Random Object*** – Displays a random object from your system.

- ***Recent Changes*** – Acts like a mini-log, displaying recent changes to your system including the name of the user, the date and time of the change, what record was affected and how. Use the settings information icon to select which table to display (Objects, Entities, etc.), as well as the desired time frame (past 24 hours, 48 hours and so on.)

- ***Comments*** – Displays recent comments posted to your public-facing front-end website, if you have User Functions installed. Change the settings to view only moderated comments, unmoderated comments or both.

- ***Registrations*** – Displays recent public user registrations if you have a public-facing front-end website that permits users to register.

- ***Tags*** – Lists recently created Tags

- ***Recently Created*** – Lists recently created records in your system. Settings allow you to choose what type of recently created record to display and how many.

- ***Records by Status*** – Lists records that have been assigned a chosen status. Change the settings to choose which status to display, the type of record and how many you wish to see.

- ***Saved Searches*** – Displays shortcut links that allow you to quickly run saved searches.

- ***Search by Set*** – Displays the objects in a chosen Set.

- ***Processing Status*** – Displays the status of any media processing.

- ***Your Watched Items*** – Lists the items currently being watched and the recent changes made to each record.

**Settings Information Icon**

While in edit mode any widget on your dashboard may be customized by clicking on the settings information icon (in the upper right corner of each Widget). For instance, in the *Recent Changes* widget, you can control how far back in time the change list goes as well as the type of records for which changes will be tracked.

**Delete Button**

Removes the widget from the dashboard. Widgets can always be re-added with the “Add Widget” button.

## 1.3 Navigation

Bracketing the CollectiveAccess browser window are two navigation bars. The *Global Navigation* bar is an area at the top of the browser window reserved for application menus, a “home” button” (the application logo) that returns you to your dashboard and the QuickSearch tool. The *Status* bar is a narrow area at the bottom of the browser window that includes the current account name, access to your preferences and a logout button, as well as some diagnostic information.

The *Global Navigation* bar is the primary access point to CollectiveAccess functions. In addition to the “home” button there are five standard menus – New, Find, Manage, Import and History – and the QuickSearch tool. Each of the menus expands when the mouse cursor is held over them, revealing all of the functions to which your login has access.

**New**

The “New” menu contains options for creating new records. Use this menu to create new records for any of the primary record types: Artifacts, Entities, Collections, Historic Event, Storage Locations, and Loans.

**Find**

The “Find” menu provides discovery tools specific to each record type (unlike the QuickSearch, described below, which targets *all* types of records). Three kinds of discovery tools are available:

- ***Basic Search*** – a simple text search box that, by default, searches all fields in a single record type. If desired, additional qualifiers, wildcards and booleans may be added for finer control of your search.

- ***Advanced Search*** – a search on specific fields using purpose built search forms. You can select from a range of standard search forms, or specify your own forms for reuse and sharing with other users.

- ***Browse*** – allows you to browse records using lists of values in specific fields. Multiple field values may be selected in sequence to rapidly refine returned results.

**Manage**

The “Manage” menu includes a variety of options to manage your CollectiveAccess preferences and tools. Options to manage personal search forms, reports and sets of records are available in this menu. System administrators will find tools for managing user logins and system setup in this menu.

**Import**

The “Import” menu contains options for importing media and metadata from external sources. Additionally, a media import tool is available for the batch ingest of images and other data. [This feature is not being used in the NB museums application.]

**History**

The “History” menu provides a list of recently viewed and edited records. It will only appear in the *Global Navigation* bar after you have searched for and viewed records in the system.

**QuickSearch**

Always available in the upper right-hand corner of the browser window, the QuickSearch is the simplest and most convenient search tool in CollectiveAccess. It will cast a wide net for terms entered into it, searching across all fields in all tables of records. Results are displayed in a table format.

# Chapter 2: Creating New Records

## 2.1 New

To create a new record in CollectiveAccess hover over the *New* menu and a list of available *tables* will appear (Objects, Entities, Locations, etc.). Hover over a particular table to see the available *types* within that table. Every record in CollectiveAccess is of a particular type and belongs to a particular table.

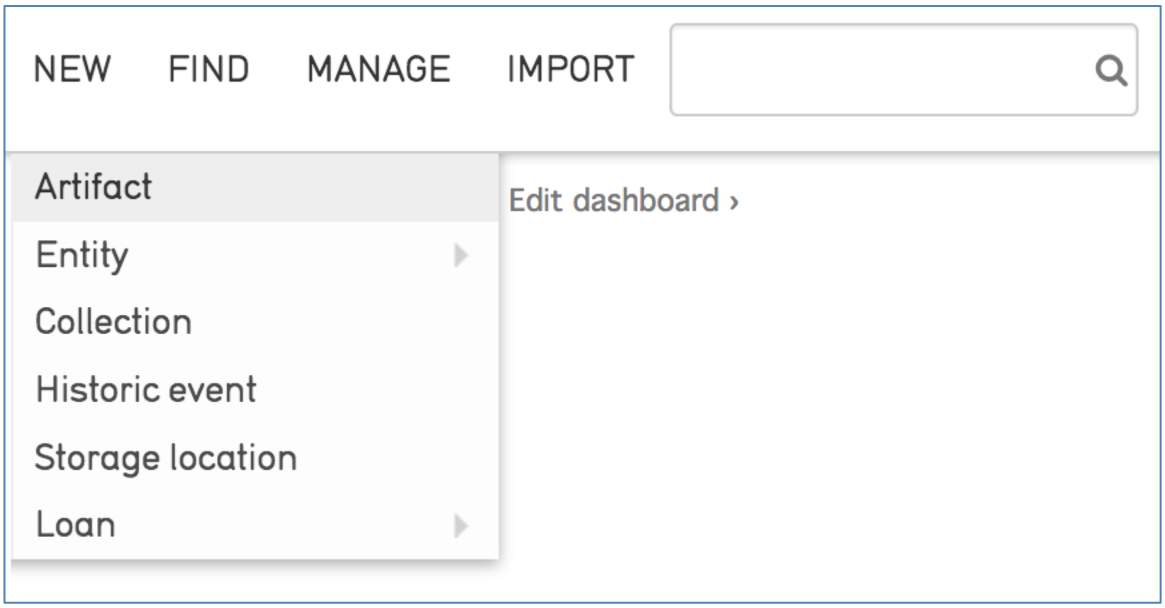



Fig 2.1: Creating a new object

When you create a new record, CollectiveAccess will take you to the Editor for the particular table and record type. Enter basic data about the record, such as the *Accession number* and *Object name* and click on the *Save* button. After saving the new record additional left-hand navigation tabs, or Screens**,** will become available, as will the Inspector panel, a compact display of useful record information and navigation.

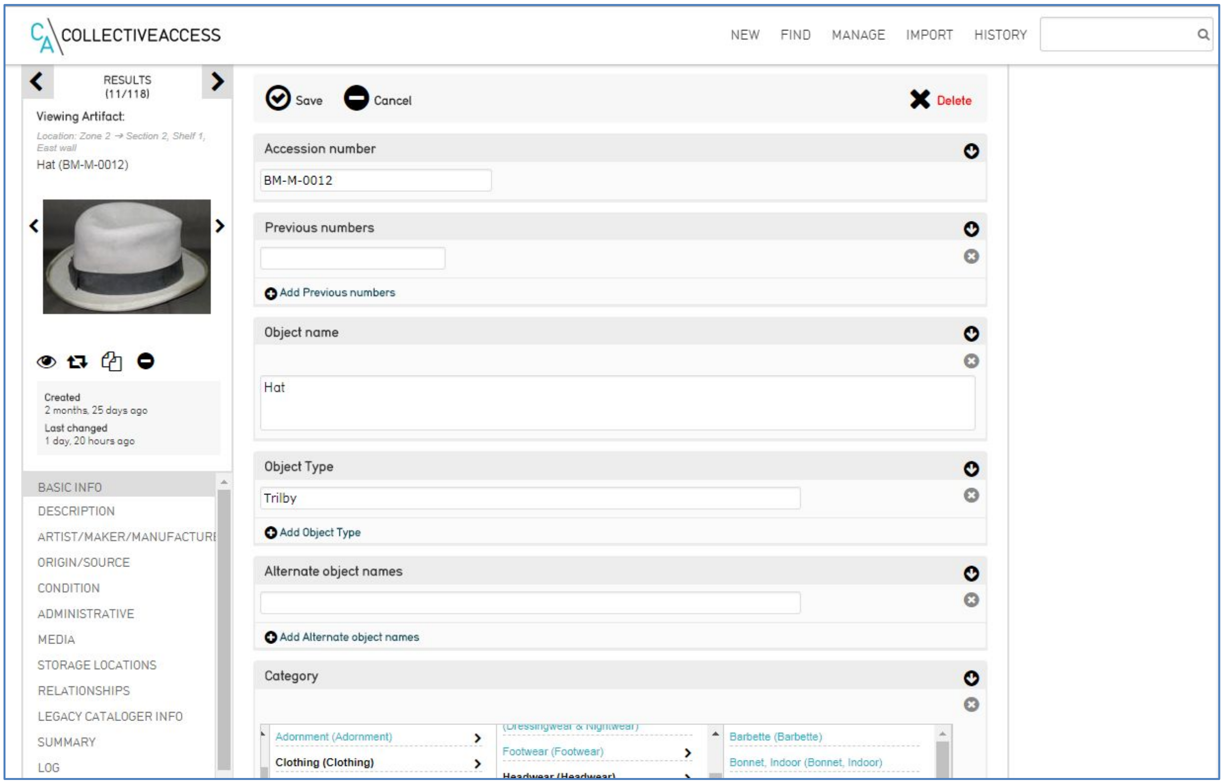


Fig 2.2: Edit object form

## 2.2 Editor Screens

The user interface for each editor is divided into several screens, each of which contains fields to capture different kinds of information about the record. Below is an example of available screens for an Artifact record. Note that not every screen is applicable to every type, and some of the metadata elements contained within each screen may vary from type to type, depending on applicability.

- ***Basic info***
- ***Description***
- ***Artist/Maker/Manufacturer***
- ***Origin/Source***
- ***Condition***
- ***Administrative***
- ***Media***
- ***Storage Locations***
- ***Relationships***
- ***Legacy cataloger info***
- ***Summary***
- ***Log***

## 2.3 Inspector

After a record has been saved for the first time, the inspector window will appear in the top left corner of the record (Fig. 2.3).


Fig 2.3: The Inspector Window

**Results Control**
The controls at the top of the inspector allow you to navigate through the results of a search or browse. Use the arrows to go forward or backward through results one by one. Clicking "RESULTS" will take you back to your full list of search results.

**Identifying Information**
Displayed under the results are the record type, name, accession number, and current location (if applicable and catalogued) of the record you are currently editing

**Watch List Icon**
Clicking this icon adds the selected record to your watch list, which can be accessed by selecting *Manage > My watched items* from the *Global Navigation* Bar. The icon turns red when active.

**Change Type Icon**
This tool allows you to change the record's "type." If, for example, you mistakenly created a "Organization" record when you meant to create a "Individual" record, you can change the type here without having to delete and re-create the record. Take care using this feature. Changing the record type will cause information in all fields that are not applicable to the new type to be discarded. This action cannot be undone!

**Duplicate Icon**
This tool allows you to duplicate a record. Duplication can be useful in cases where you are tasked with creating several records with similar metadata. You can control precisely what kind

of record data are duplicated (metadata, relationships, media) using the duplication settings under *My Preferences*.

**Less/More Info Icon** ⊖

This tool collapses or expands the Inspector window to include more information, such as record creation and update times, as well as any Sets the object record may belong to.

**Media Thumbnail**

The inspector window also shows a thumbnail image of attached media. When there are multiple items attached to a record, arrow keys will appear to scroll through all media. Clicking the thumbnail will launch the Media Viewer allowing full-size viewing of images, video and documents, as well as options to download it in a range of sizes. To show/hide the media thumbnail, Alt-click within the inspector.

## 2.4 Common Metadata Element Types

Each Editor Screen contains several fields, or metadata elements. Each field is of a particular Data Type that determines what sort of data can be input. Some elements are repeatable.

A few of the most common Data Types are:

- ***Text*** – Many metadata elements in the system are simply free text, meaning you can enter any kind of character. Some fields may have Rich Text Editing enabled, which means the field allows text formatting, including bold, italics and underlines.

- ***List*** – Other fields, such as drop-down menus and checklists, are populated by predefined Lists, which are managed under *Manage > Lists & Vocabularies*.

- ***Date Range*** – Accepts any valid date or date range. Dates and date ranges may be entered in a variety of formats. For example, October 25, 2017 may be entered as “October 25, 2017”, “10/25/2017”, “25 October 2017”, “2017-10-25” and more. Broader, inexact dates may also be entered: “October 2017”, “10/2017”, “2017”, “2010s”, “21$^{th}$ century”. Ranges are entered as two dates (exact or inexact) separated with a hyphen: “March 2000 - October 2017”. For a full description of date formats see http://docs.collectiveaccess.org/wiki/Date_and_Time_Formats.

- ***Currency*** – Accepts currency values comprised of a numeric value and a currency symbol. Symbols include $, £, ¥ and €; standard three letter currency abbreviations can also be used.

- ***Container*** – Bundles together several sub-fields into a single data value. Complex articulated fields built from the types described above can be created using Containers.

A complete list of data types can be found here:
[http://docs.collectiveaccess.org/wiki/Attribute_Types](http://docs.collectiveaccess.org/wiki/Attribute_Types)

## 2.5 Relationships

One of the key aspects of CollectiveAccess is the ability to create relationships *between* records.

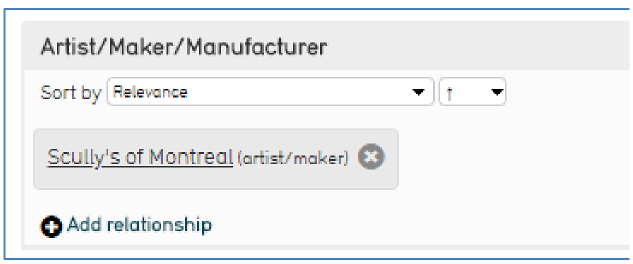



Fig. 2.4: Relationship bundles

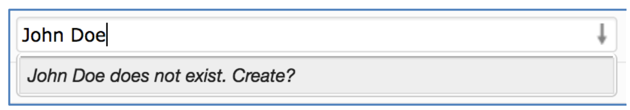



Fig 2.5: Quick Add prompt

A relationship bundle works differently from a metadata element. When you enter a name into a relationship bundle, a type-ahead search is performed on the system. If the search finds matches, you'll be prompted to select one and add the relationship. (Fig. 2.4)

If no match is found, you'll be prompted with the option to create a new record with the entered name. (Fig 2.5) If you select the create option, the Quick Add window will appear, and you will be able to create the record without having to leave the record currently being worked on. Unless a custom User Interface has been configured, the Quick Add pop-up editor is identical to the User Interface displayed when creating a new record through the *New* Global Navigation dropdown, but packaged in a pop-up window. (Fig 2.6) See section 5.1 User Interface Configuration for more on configuring custom User Interfaces for use in Quick Add pop-up editors.

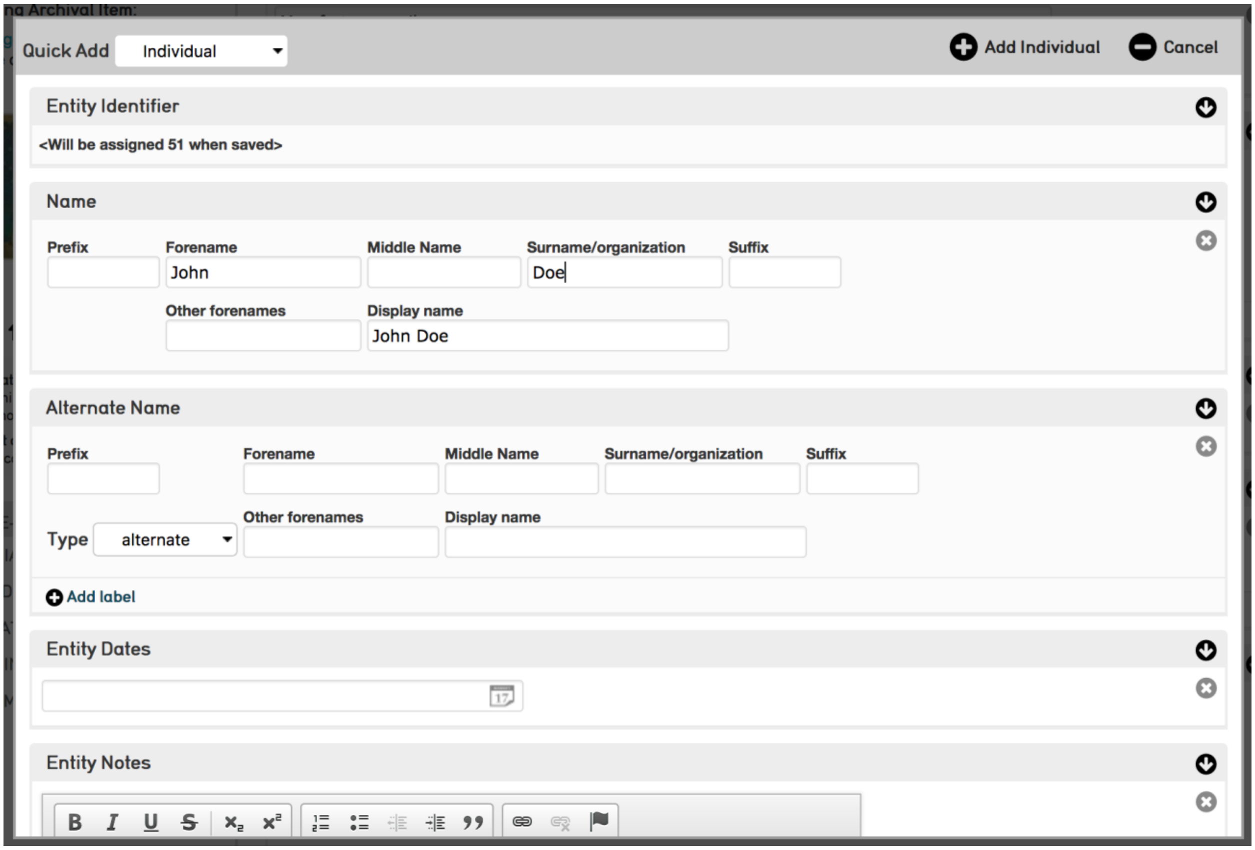



Fig 2.6: Quick Add pop-up editor

Relationships allow information to be centralized and “pulled” into other records as needed. For example: rather than repeatedly typing the name of an individual into Artifact records, you can create a single Entity record for the individual at the outset, and relate it to the relevant Objects. The centralized Entity record serves as a container for additional information beyond just a name, such as address, telephone, email, biography and more. All related objects can include this Entity information, and changes made to Entity data are instantly reflected everywhere in the database that the Entity is referenced.

Ensuring that all Objects use consistent data relationships can greatly improve search and browse quality. In the Entity example, relationships make finding all objects by a single creator a simple matter. Further, by minimizing data entry they reduce cataloguing time and opportunities for data entry error.

## 2.6 Media Representations

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 Type, Status, Access – in the NB Museums application you can leave these as is. Click on the *Save* button to save the image; if it a very large image you may notice an uploading progress counter at the bottom of the screen. Continue these steps to upload more images by using the *Add Representation* link. Afterwards you will have the opportunity to select which file to be the “primary” representation of the record (Fig. 2.7). The primary representation is the media that should be used to illustrate the record in situations where only a single representation can be used, such as in search results.

The database system will automatically resize uploaded media to various standardized sizes; for this reason, it is best to use the highest quality image, video or document files available.

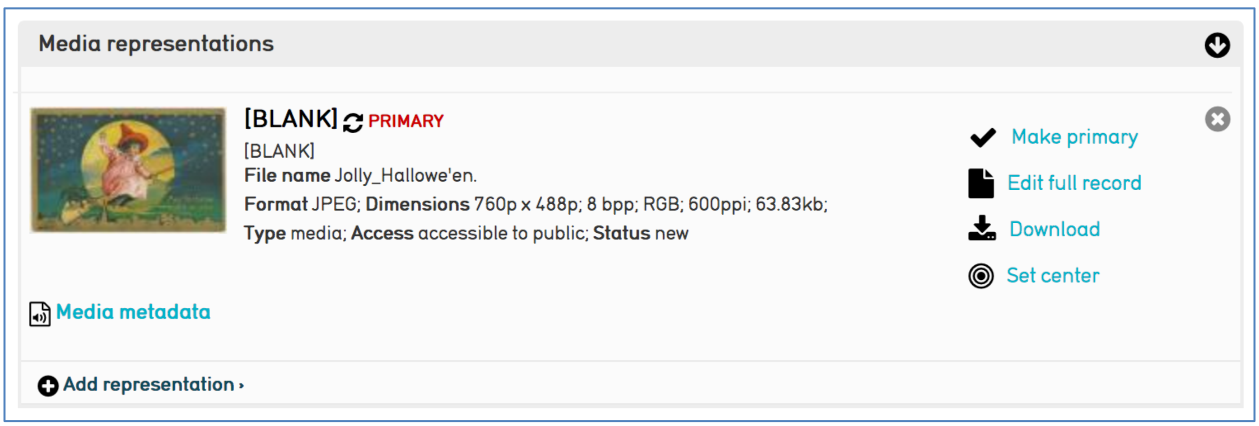


Fig 2.7: The Media Page After Attaching Images

After you have added media to the record, it will appear on the media page as well as in the Inspector window in the upper left of the page (Fig. 2.3). Clicking on an image in either place will launch the Media Viewer, which allows you to pan, zoom, and cycle through images, play video or view documents, as well as download them at various sizes. The media viewer can be closed by pressing the “x” button in the lower-right hand corner of the Viewer or by using the escape key.

To edit information about the image, such as the Access, Title, or other media representation metadata, click on the “Edit full record” icon within the media bundle .

## 2.7 Creating new Storage Locations

To add a new storage location in *New > Storage location* from the Global Navigation:

Using the arrows to navigate to the location of the new storage

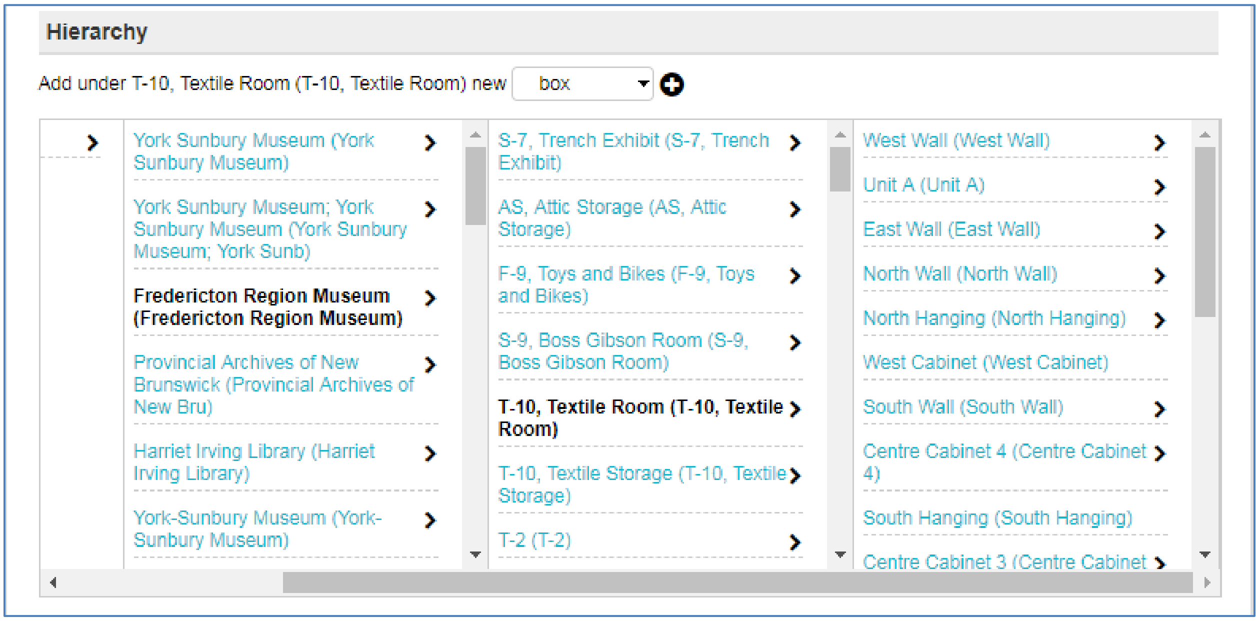



Fig 2.8: Storage Location Hierarchy Browser

Note: if you have previously navigated deep into the storage hierarchy clicking on any left-most viewable arrow will return you to the beginning of the hierarchy

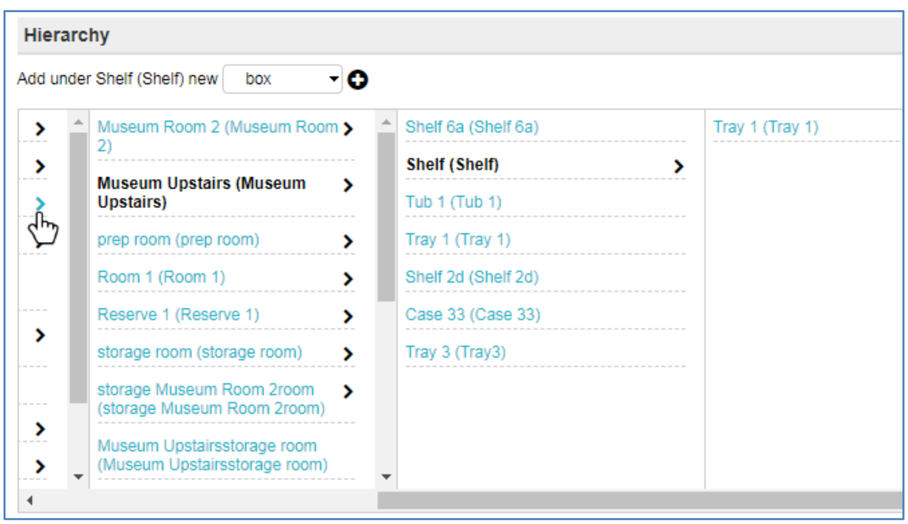



Fig 2.9: Returning to the topmost level of the hierarchy

Select the type of storage and click on the *"+"* symbol:

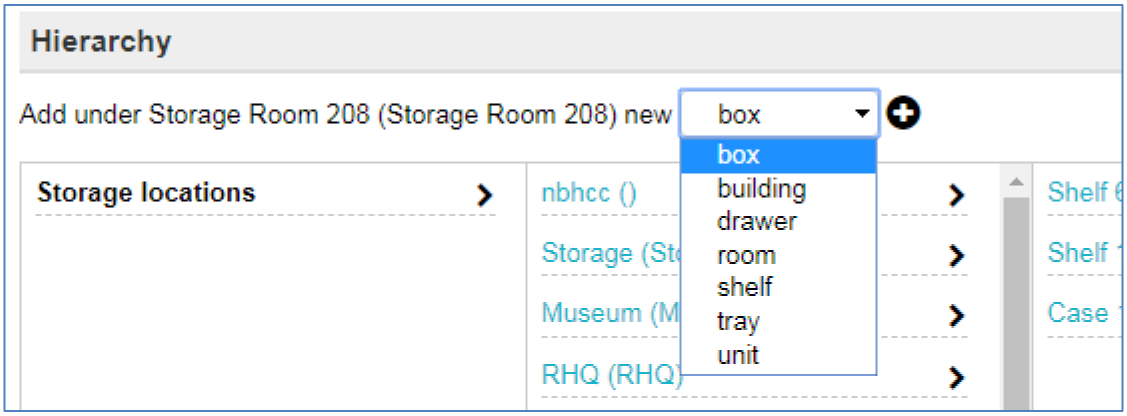



Fig. 2.10: types of storage locations

You can now give the location its name, use the same name in the *Location identifier* field as well, then click on Save. To return to the hierarchy click on *Results* at the top of the Inspector area

## 2.8 Deleting Records

Records in CollectiveAccess can be deleted. Users have the authority to delete records or are prohibited from deleting records based on their *Access Role.* For users with the proper permissions, deleting a record is as simple as clicking the Delete button to the right of the Save and Cancel buttons. Users will be prompted with a warning prompt (*Really delete*?) and also prompted with an option to transfer any references the record may have.

**Delete & Transfer**

CollectiveAccess gives users the option to transfer a record's references to another record before deleting it. This can be a very useful tool in situations where, for example, two entity records were created for the same person. Perhaps one was erroneously named "Dave Smith" while the correct authority is "David Smith." You need to remove the duplicative, incorrect Entity but unfortunately "Dave Smith" has been related to many object records. Rather than painstakingly adding the object relationships to "David Smith" by hand, you can simply transfer the relationships from "Dave Smith" to "David Smith" upon the deletion of "Dave Smith".

When you delete a record that is referenced in other records, you will see a prompt that tells you how many times that particular record is referenced. You have the option to *remove all* *references* or *transfer references.* Under the latter prompt you will find a search bar that will allow you to search for the appropriate record to transfer the relationships to. (Fig. 2.11)

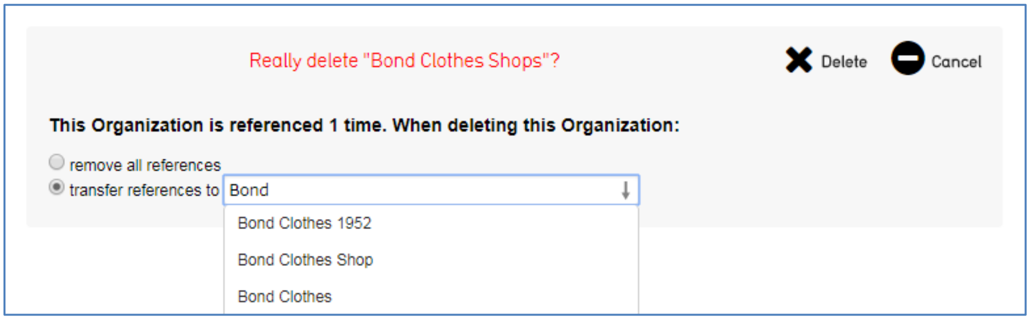



Fig. 2.11: deleting a record and transferring references

**Batch Delete**

It is possible to delete multiple records at once using Sets in conjunction with the Batch Editor. To do this, the user's access role must be enabled to allow Set and Batch editing (see section 4.6 on Sets and the Batch Editor). In short, any set of records can be opened in the batch editor. When you click the "More options" link in the Inspector window of the batch editor, you'll find a prompt to delete *all* of the records in the set. Be careful with this feature!

# Chapter 3: Find - Searching and Browsing

In addition to the QuickSearch (described in section 1.3), there are three other ways to locate records, each providing a higher degree of precision than the QuickSearch: The basic search, the advanced search, and the browse. All three are accessed from the Find menu in the *Global Navigation*.

## 3.1 Basic Search

At its simplest the basic search is a full text search (Fig. 3.1) across *all* fields within the table you're searching in (e.g. *Find > Objects* searches for Object records, *Find > Entities* searches for Entity records). Simply type in a word or phrase and click on the "search" button to receive matching results.

A search syntax (described in detail at http://docs.collectiveaccess.org/wiki/Search_Syntax#Fulltext_searches) may be used to create more precise basic searches that include boolean combinations, wildcard searches, searching on creation and modification dates and more.

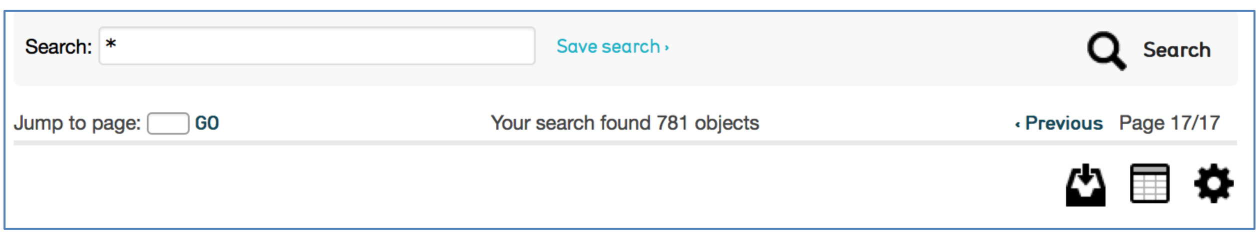



Fig 3.1: Basic search bar

## 3.2 Advanced Search

The Advanced Search allows users to define custom search forms, consisting of specific fields. While the basic search, by default, looks across all fields, the advanced search always searches within *specific* fields and generates highly targeted results.

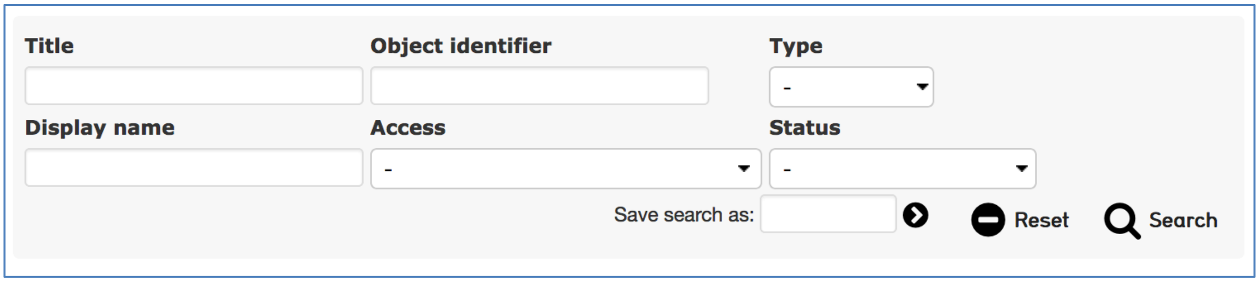


Fig 3.2: Example of an advanced search form

Advanced search forms are created through *Manage > My search tools > Search forms*. More information on creating search forms can be found in section 4.7 Search Tools.

## 3.3 Browse

The Browse allows you to generate and refine results by filtering on specific attributes of data. For example, by browsing for Objects by Entity, you can retrieve every single object that is created by a particular individual. You can further refine these results by selecting additional attributes. For example, by selecting Decades you can choose to retrieve only records for artifacts made in the 1970s.

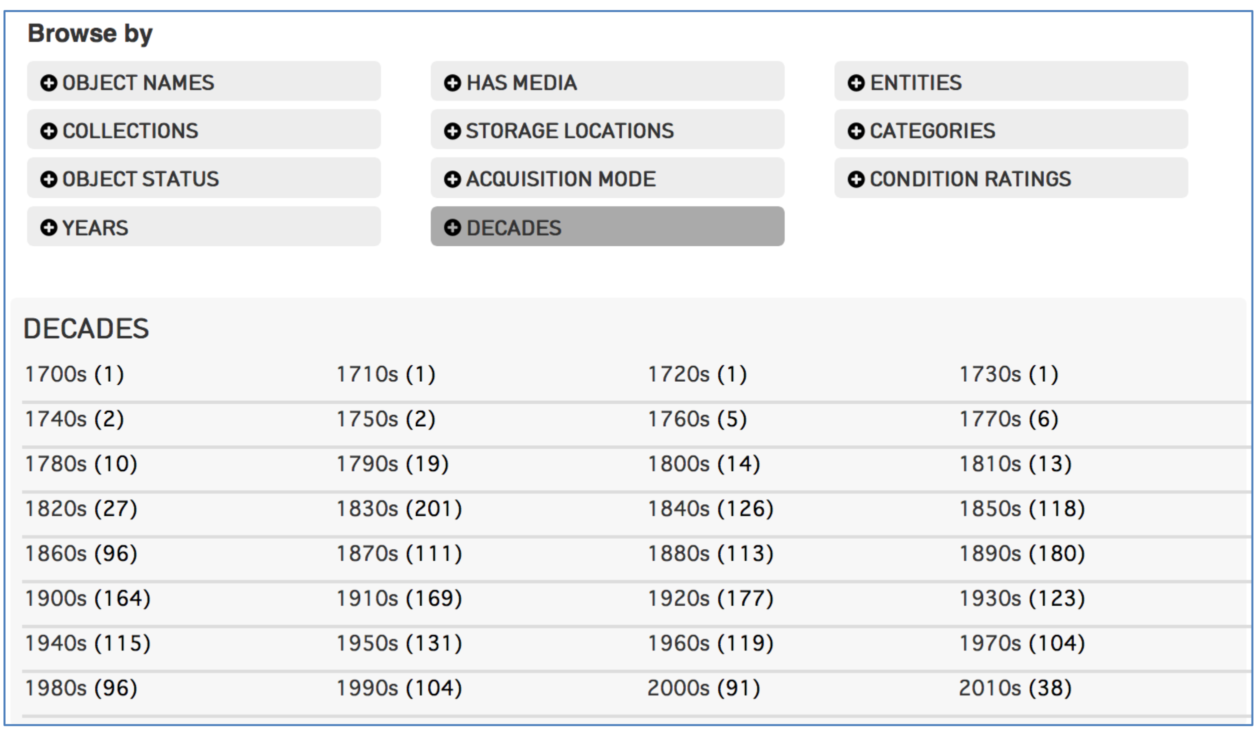


Fig 3.3: Browse menu for Objects

To return the search to show all data you can remove criteria you used to browse by clicking on the "*x*" beside the label or click on "*Start Over*".

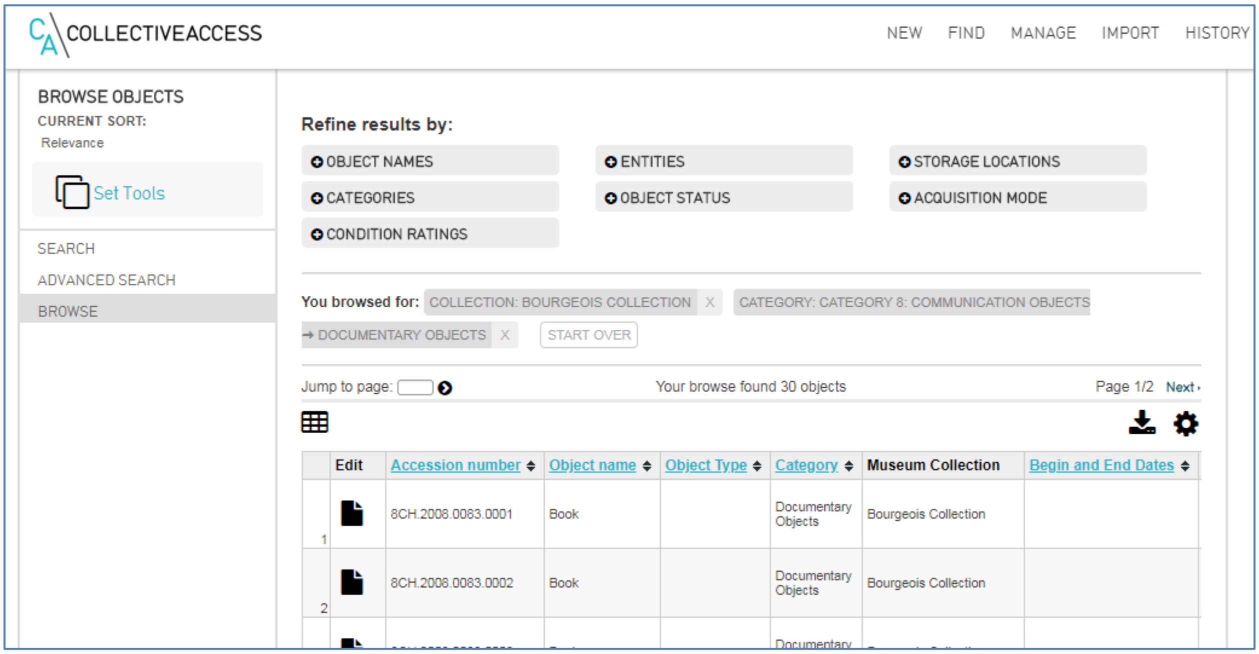



Fig. 3.4: Resetting the search in Browse

## 3.4 Working with Results

Once you have generated results using any of the available search tools, there are several options available to control how the data is displayed, refined, edited and exported.

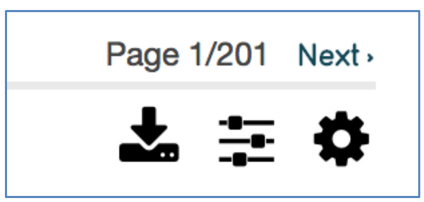



Fig 3.5: Search result tools: *Export tools, Refine results, Display Options* (respectively)

## Display Options

Fig 3.6: Display Options

Click on the display options icon to view all settings to control how search results are displayed.

**Sort:** choose how results are sorted. You can sort on relevance, title, idno (ID number), or any number of other data attributes.

**Ascending/Descending:** specifies the direction to sort, either ascending or descending order.

**#/page:** the maximum number of results to be shown per page (12, 24, 36, 48)

**Layout:** three layout options for search results are available for Objects (a subset of these options are available for other types of records). Thumbnails displays image thumbnails, along with title and idno. The List layout displays results in a tabled format, similar to a spreadsheet. The metadata that is shown is controlled by Displays, explained in detail below. Finally, Full mode displays the primary object image as well as all metadata from the chosen Display**,** but in a vertical form, rather than a tabled spreadsheet.

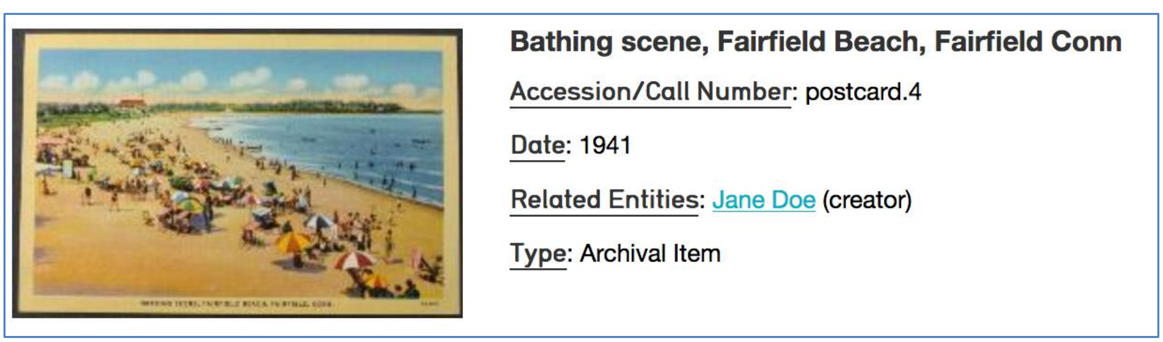


Fig 3.7: Full display

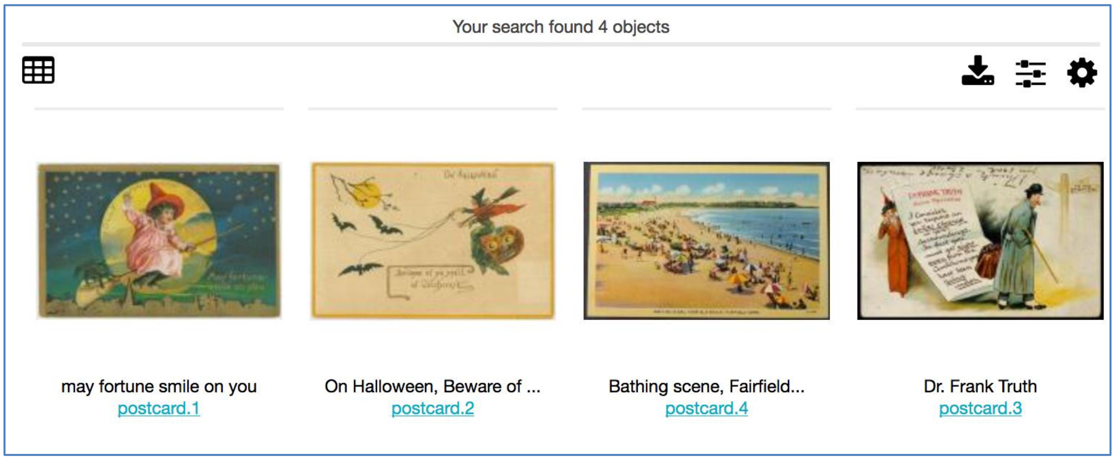



Fig 3.8: Thumbnail display

| | Edit | Accession/Call Number | Title | Date | Related Entities | Type |
|---|---|---|---|---|---|---|
| 1 | | postcard.1 | may fortune smile on you | 1933 | Jane Doe (creator) | Archival Item |
| 2 | | postcard.2 | On Halloween, Beware of ye spell of Witchcraft | 1930 – 1940 | Jane Doe (creator) | Archival Item |
| 3 | | postcard.4 | Bathing scene, Fairfield Beach, Fairfield Conn | 1941 | Jane Doe (creator) | Archival Item |
| 4 | | postcard.3 | Dr. Frank Truth | 1937 | Jane Doe (creator) | Archival Item |

Fig 3.9: List display

**Display:** choose which metadata Display to use to view your search results. Displays allow you to precisely control the fields and formatting displayed in search results or on a Summary page. Once you create custom displays and configure the search results or record summaries, you may batch-edit data in spreadsheet format or export the data as tab or comma delimited files, an Excel spreadsheet or as a PDF. Through their ability to define both fields and precise formatting of field data, displays form the backbone of CollectiveAccess' reporting system. Once defined, any search or browse result set can be piped through a display and into on-screen, printable or shareable output.

**Export Tools**

Export tools allow you to export the results of a search or browse – with any configured Display – to a variety of formats, including tab and comma delimited, Microsoft Word and Excel, or PDF. See Creating Reports for more information on exporting display-structured data: http://docs.collectiveaccess.org/wiki/Creating_Reports

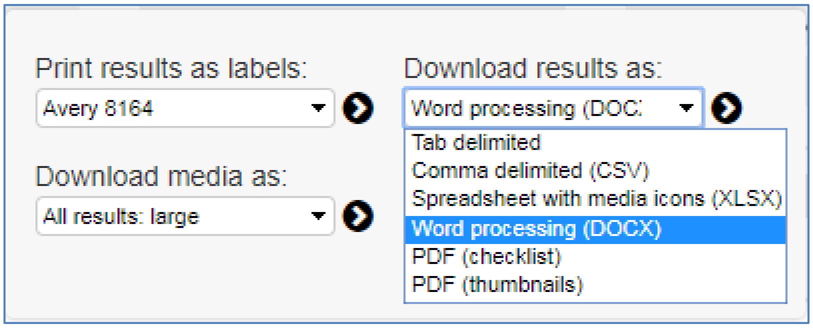



Fig 3.10: Export tools

**Refine Results**

Refine controls enable filtering of search results using the same controls used for browsing. It is essentially no different from the Browse, except that you can run a full text search first and *then* use the browse facets to further refine the results of the full text search.


Fig 3.11: Refine results

**Edit in Spreadsheet**

Spreadsheet mode looks similar to the List mode, but allows you to apply edits directly to most fields in the listed records without leaving the search results screen.

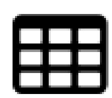


Fig 3.11: Edit in spreadsheet button

More information is available here: [http://docs.collectiveaccess.org/wiki/Editable_Spreadsheets](http://docs.collectiveaccess.org/wiki/Editable_Spreadsheets)

**Set Tools**

Sets, explained in greater detail below, are ordered, ad-hoc groupings of a single type of record defined by users for a practical purpose (e.g., a working checklist for an upcoming exhibition, or

a set of records that need to be completed). Sets are distinct from Collection records in that they are typically temporary groupings and meant for workflow, while Collection records are archival or curatorial in nature and intended to record collection-level cataloging. An additional use of Sets is for grouping records for batch editing en masse using the Batch Editor.
http://docs.collectiveaccess.org/wiki/Batch_Editing

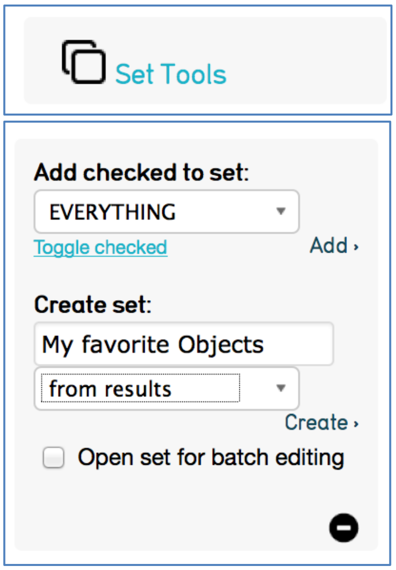


Fig 3.12: Set Tools

You can create Sets directly from results using Set Tools.

**Create set:** Allows naming and creation of a set consisting of either a) the entire search results or b) only those checked.

**Open set for batch editing**: Opens the set in the Batch Editor for applying global edits.

**Add checked to Set:** Allows addition of records to pre-existing Sets, by checking them off and selecting "Add checked to Set."

**Using sets**

You can access your sets by:
- adding a "Search By Set" widget on your Dashboard
- doing a Find > Objects > Basic Search, selecting the named set from "Search by set" and clicking on the arrow

You can edit your set name and results by going to Manage > My Sets > User sets , click on the edit icon of the set you wish to edit. From the tabs on the left hand side "Set Info" will allow to change the name of the set, "Items" will allow you to add or remove items from the set.

# Chapter 4: Manage

The Manage menu in the *Global Navigation* contains many user tools as well as functions restricted to site administrators.

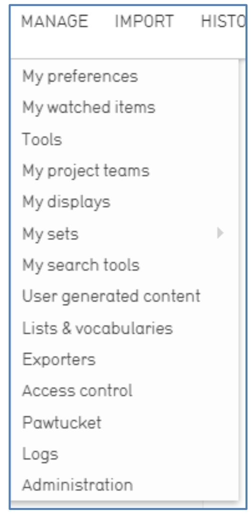


Fig 4.1: Manage menu

## 4.1 Preferences

Users can set optional preferences by navigating to *Manage > My Preferences*. The settings here are specific to the user and will not affect others users in the system. The default preferences will be sufficient for most users and customizing them is not a requirement. However, users may find a few of the options to be helpful.

**General**
Users can select their preferred language, CollectiveAccess theme, whether to *Show current location as 'breadcrumb' trail,* retain previous search terms and results when performing a search or browse, and can set whether search terms remain editable in the QuickSearch bar or if they are auto-cleared.

**Editing/Batch Editing/Quick Add**
Users can select which User Interface to use for editing, batch editing and quick add forms for specific record types.

**Media**
Users can establish a filenaming policy for media downloaded from CollectiveAccess. This can be set to download with the original filename (as first uploaded) or to rename each downloaded file to the object identifier and a few other choices.

Users may also select which *PDF viewer* to employ when viewing PDF documents.

**Units of measurements**

Users can choose how measurements are displayed: as entered, or in metric or imperial units or fractions.

Display currency can also be set. By default, currencies are displayed in USD.

**Duplication**

Users who use the record Duplication tool will likely want to set these preferences. These settings control precisely what is duplicated when the feature is employed. For each table, you may select the metadata on a per-field basis, relationships on a per-table basis, and whether or not media representations are duplicated along with the data.

**QuickSearch**

Here users may select which tables appear in *QuickSearch* results.

**User Profile**

Users may enter contact information into their profile here.

## 4.2 Watched Items

View and delete items from your watched items list. Items are added to the watched items list by clicking on the eye icon  in the item's Inspector window. Reached through *Manage > My Watched Items*.

## 4.3 Tools

System specific, custom plugins are accessed here.

## 4.4 Project Teams

Access to Sets, Displays and Advanced Search forms can be shared by groups of individual user accounts called Project Teams. Teams allow you to create project-specific restricted access groups to collaborate with using workflow tools such as Sets, Searches and Displays.

## 4.5 Displays

CollectiveAccess allows fine control over information displayed in search results and in the summary page of records. Any metadata element from the user interface can be added to a Display form. These can be used to view search results, generate PDF reports, or export data to Microsoft Word, Excel, CSV, or other formats.

**Using Displays**

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

**For Searches:**


Fig 4.2: Choosing a display for use with search results in the Display Options panel

To change the display in search results, click on “display options” and select the display you would like to use from the drop down menu, and click the arrow.

**For Summaries:**

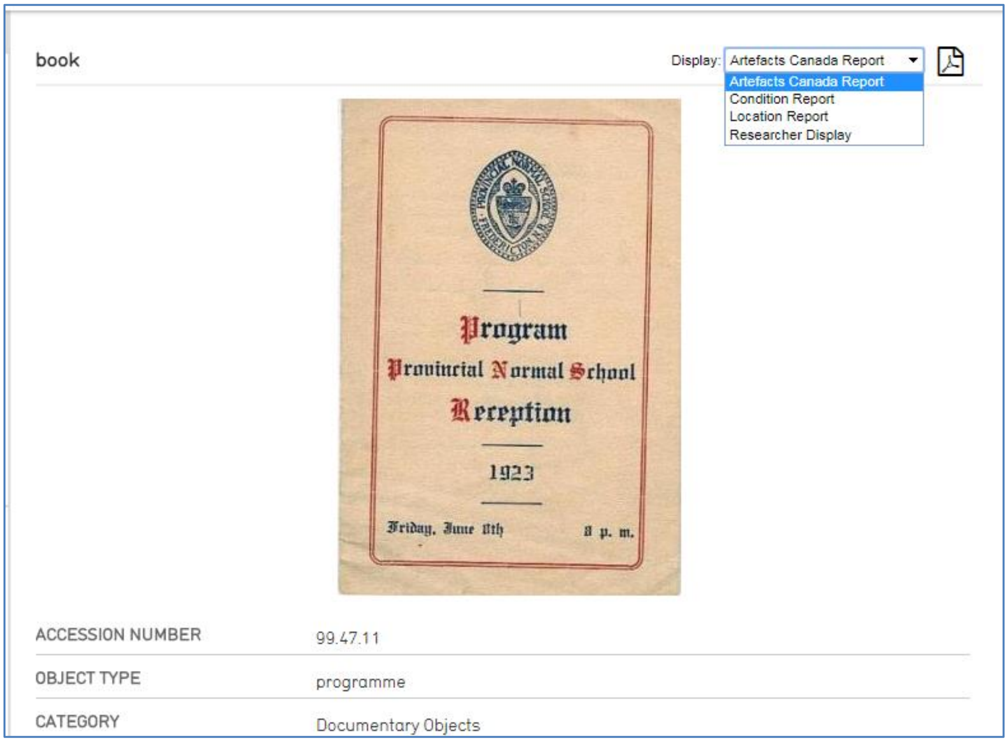



Fig 4.3: Choosing a display for use with the summary screen

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.

**Adding a New Display**

Navigate to Manage > My Displays. In the top right, in *New display for* select "*objects*" and click on the "+" icon. Give your list a meaningful descriptive name (not too long) in *Display List Name*, click on *Save*.

Now the *Display List* tab on the left hand side is available to you, click on it.
All the object-related fields are there under *Available Information*, it's a matter of clicking on the fields you want and dragging them over to the *Information to display* column. You can then slide those selected fields up and down to put them in the your preferred order.
Click on *Save*.

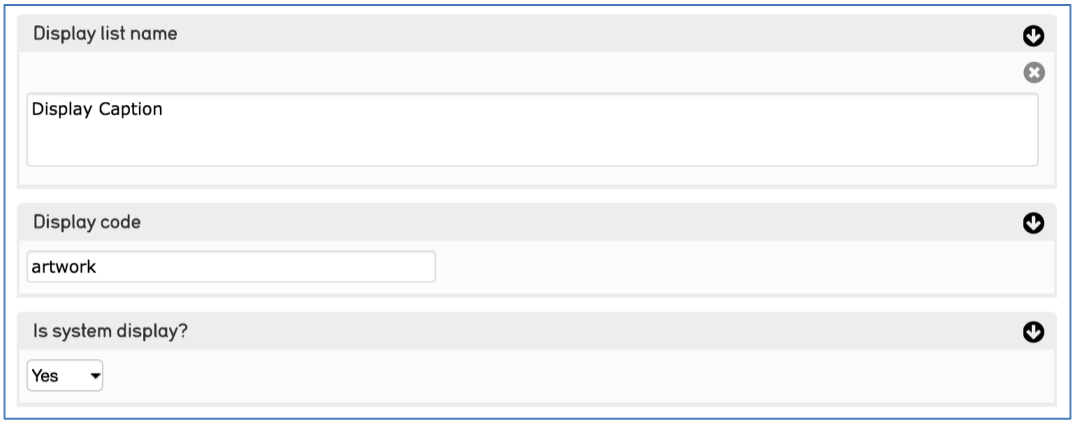


Fig 4.4: Creating a new display

**Display name**: Assign a name to the display.

**Display Code**: Assign a unique identifier for the display. This identifier should be only letters, numbers and underscores.

**Is System Display?** If set to yes, the display will be available to all users system-wide. If set to no, the display will only be accessible to you, the display's creator, unless you assign **User Access** individually or **Group Access**, for project teams.

**Display List**: The display list screen is divided into two columns. The left hand side has a list of all the fields available to the User Interface. The right hand column is where you place the contents of 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. You can customize the display of each field by clicking on the "info" button and changing the values in the displayed settings panel.

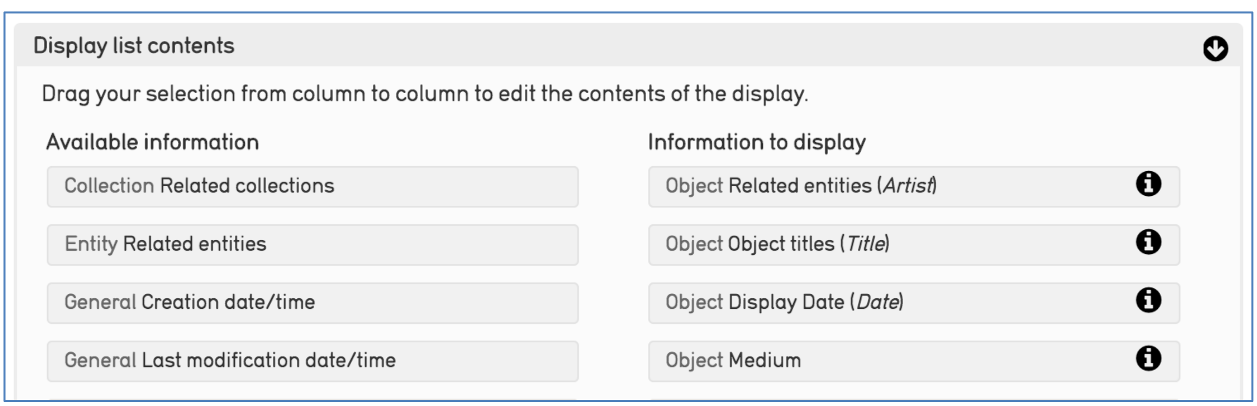


Fig 4.5: Customizing display fields

## 4.6 Sets

Sets are simply ordered groups of records. They are useful for a wide variety of workflow, management, front-end presentation and sharing tasks. The three most common uses for sets are:

1. To apply edits to groups of records. Do so by creating a Set and opening it in the Batch Editor.
2. To define groups of records for display on a Pawtucket-based front-end website, either on the front page or in a gallery or online exhibition. Pawtucket-based front-end websites can be configured to use specific sets in certain contexts. (not applicable to our NB museums application)
3. To manage workflow. Practical tasks, such as generating curatorial checklists, grouping together records that require further attention or generating "shopping carts" of objects for reporting can be accomplished by creating sets.

A new set can be created by selecting *Manage > My sets*, and then selecting the type of set to create, either a public presentation (for display on a public web site) or a user set (for use in reporting or workflow tasks), and the type of records the set will contain—objects, entities, etc.

Assign a Title and Code to the Set, then apply User and Group Access if necessary.

**Items**

After you have entered basic information about your set and saved, you can click on the Items screen to begin adding records to your set.

Items can be found by typing criteria into the search bar, similar to the Basic Search. You will be prompted with relevant matches. Clicking on a match will automatically add it to the set. Once added, items can be dragged and dropped to reorder as desired. Clicking on the page icon or thumbnail will take you to the set item editor, which allows you to add captions and descriptions to set items. This information is specific to the item in the context of the set, not the record itself. Set items can be exported in various formats by using the "Export as" option at the top of the Set Items bundle.

Once a set is created, its contents can be quickly displayed on the corresponding Find page using Search By Set**.** As mentioned earlier, Sets can also be created and added to via Set Tools in the search results screen.

For more on [Sets](http://docs.collectiveaccess.org/wiki/Sets), see [http://docs.collectiveaccess.org/wiki/Sets](http://docs.collectiveaccess.org/wiki/Sets).

## 4.7 Search Tools

**Search Forms**

Just like Displays, Advanced Search forms can be created and configured by the user. This can be used to create custom searches that cover only the fields you specify. To create a new search form, navigate to *Manage > My Search Tools*, for *New search form for* select "Objects" from the drop-down box then click on the "**+**" button. You can create forms for any primary table.

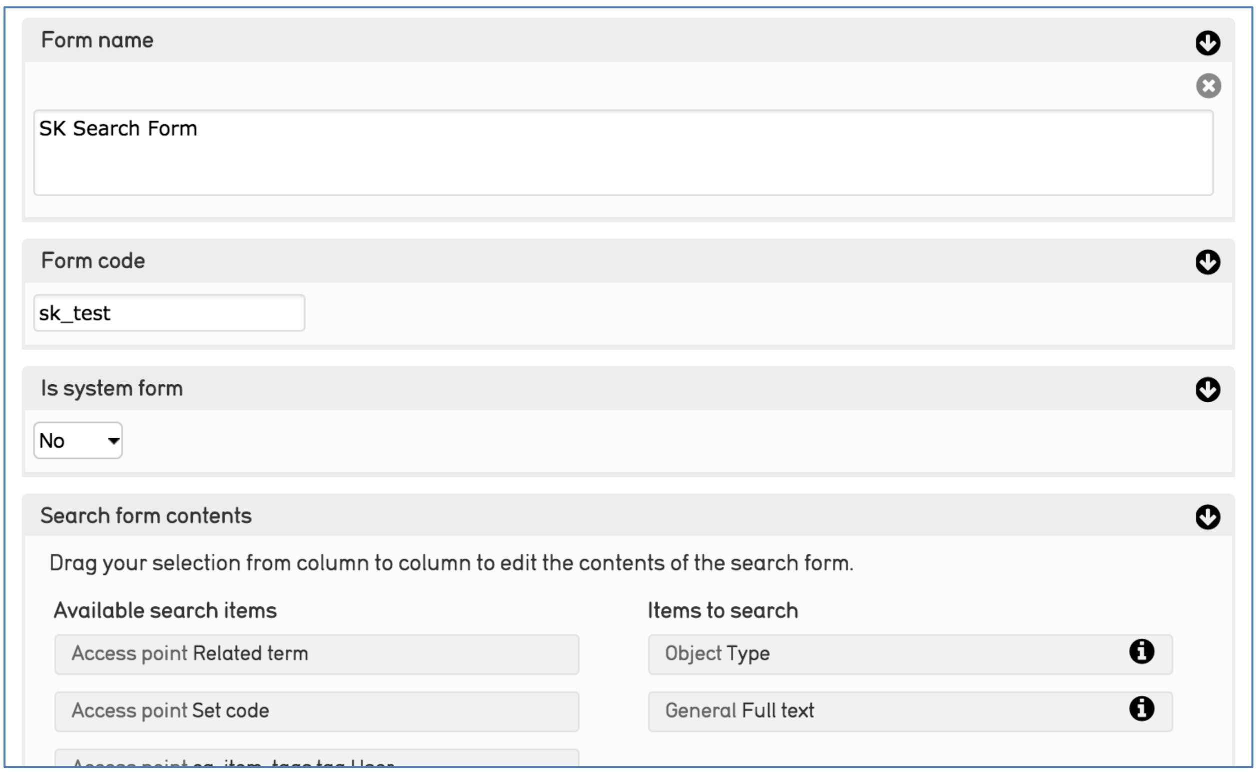



Fig 4.6: Creating a new advanced search form

As with Displays, assign a name and code to your search form, and select whether it is a System form. If set to yes, the form will be available to all users system-wide. If set to no, the form will only be accessible to you, the form's creator, unless you assign **User Access** individually or **Group Access**, for project teams. Fields are added and edited in the same manner as displays, above.

Once the desired fields have been added, save the form. To test the search form, navigate to the appropriate find page and select the form from the drop-down, then enter search criteria and click on the “search” button.

**Saved Searches**

Searches for any record can be saved by clicking the “Save Search” link in Basic Search forms or using the “Save search as” form within Advanced Search forms. You can view, delete and execute your saved searches in *Manage > My Search Tools > Saved Searches*.

## 4.8 User Generated Content

[Not used in NB museums application]

## 4.9 Lists and Vocabularies

Many metadata elements and structural attributes of the data model are populated by Lists. Any drop-down menu or checklist has a corresponding list, and the definitions of record types (for Objects, Entities, etc.) are defined as lists with specific names. For example, the list of Object types in the system is defined in the “Object types” list.

You can manage these lists by navigating to *Manage > Lists & Vocabularies.* More information on Lists and Vocabularies can be found here:
http://docs.collectiveaccess.org/wiki/Lists_and_Vocabularies

## 4.10 Exporters

Custom export mappings are supported to export CollectiveAccess data to a variety of XML formats. For most users the Export Tools - documented in chapter 3 section 4 (3.4) - should be sufficient. For more advanced options see:
http://docs.collectiveaccess.org/wiki/Data_Exporter

## 4.11 Access Control

To manage workflow and control access to data, all users have individual CollectiveAccess logins. Users with an administrative login may manage user accounts, using the access control tools reached through *Manage > Access Control*. These tools allow you to create user login accounts and assign specific roles to users, e.g., “cataloguer” or “researcher”. The roles, in turn, determine the scope and level of access a user has to the system.

### User Logins

To create a new user login, go to *Manage > Access Control > User Logins*.

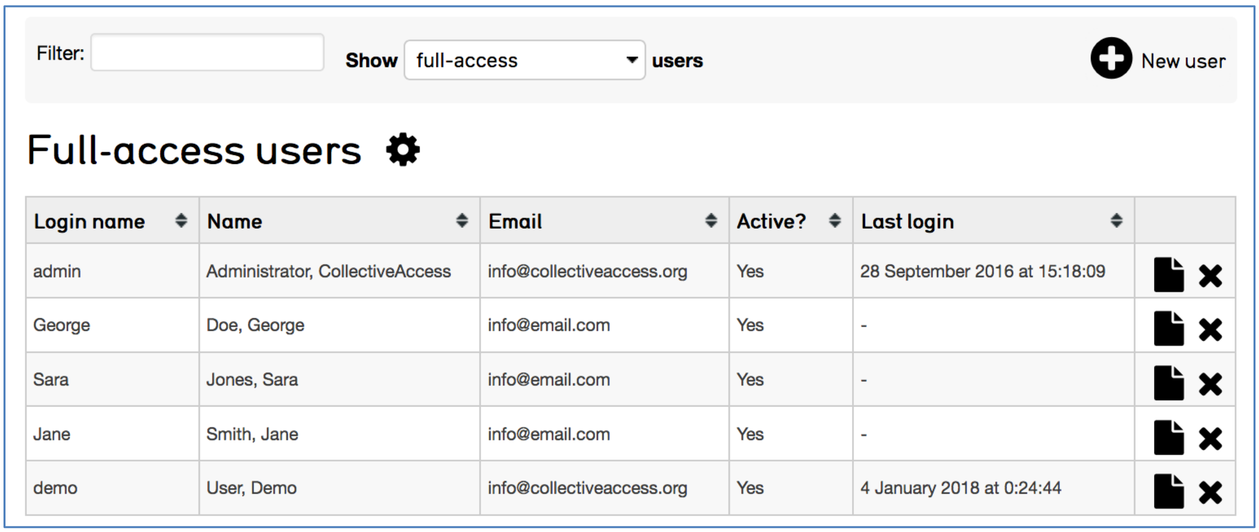



Fig 4.7: List of Full-access Users in *Manage > Access Control*

### Creating User Logins

You can specify settings for the new user via a form. Enter basic info about the user, only the first seven fields are mandatory; *user class* will always remain *full-access*.

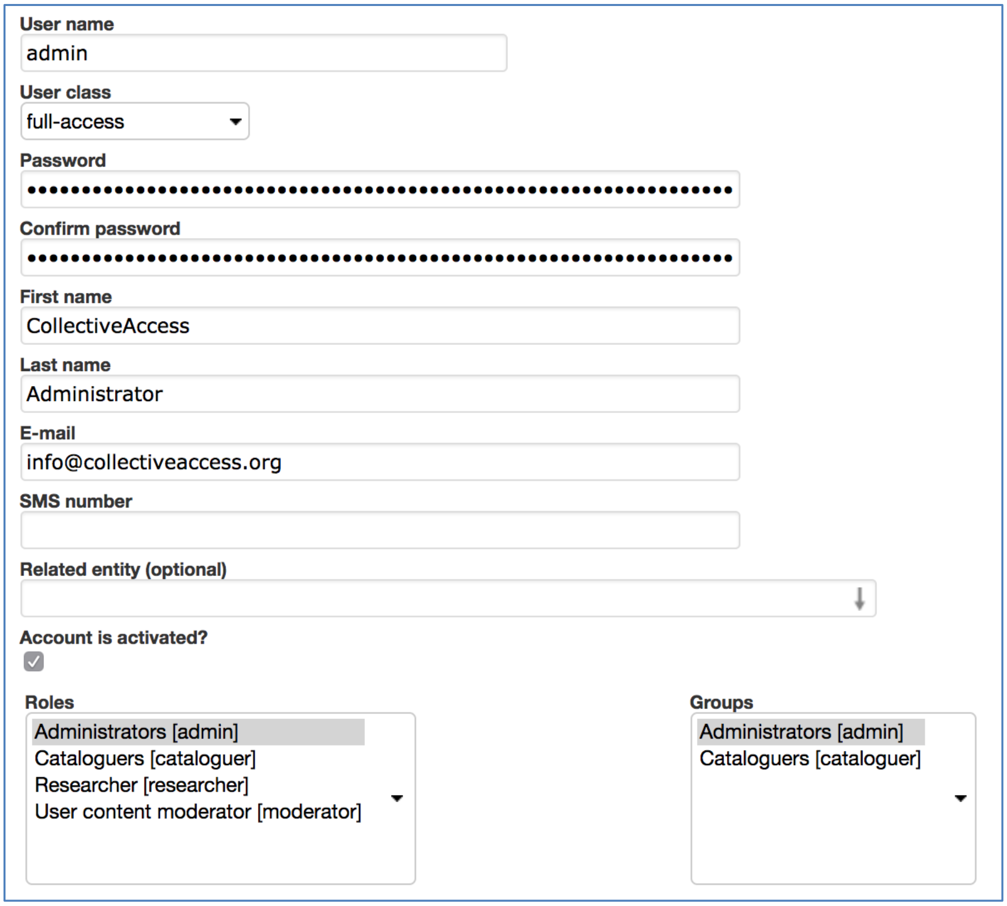



Fig 4.8: User Login Form

Be sure to check the *account is activated?* checkbox. You may temporarily disable a login by unchecking this box at any time.

The “Roles” and “Groups” select boxes list available roles and groups for the user. Each login should have one or more role assignments, such as “cataloguer” or “researcher.” The privileges these roles confer are defined in the Roles configuration available to administrators at *Manage > Access Control > Roles.*

Groups allow you to confer predefined combinations of roles to users, as well as bundle users together for the purpose of sharing forms, sets, and displays. A login does not necessarily have to be associated with a group, but if you wish to convey a predefined bundle of roles or share information within a specific project team, for example, you will want to define that group, add roles and populate it with users. System-wide groups may be managed by administrators at *Manage > Access Control > Groups.* Groups created by users for their own project may be managed at *Manage > My Project Teams.* User-created groups may not confer roles; their members retain only privileges given to them by administrators.

### User Groups

To create user groups appearing on the “User Logins” page, navigate to “User Groups” using the left-hand side navigation. A screen will be displayed with existing user groups, which may be edited. To create new groups, use the “New group” button.

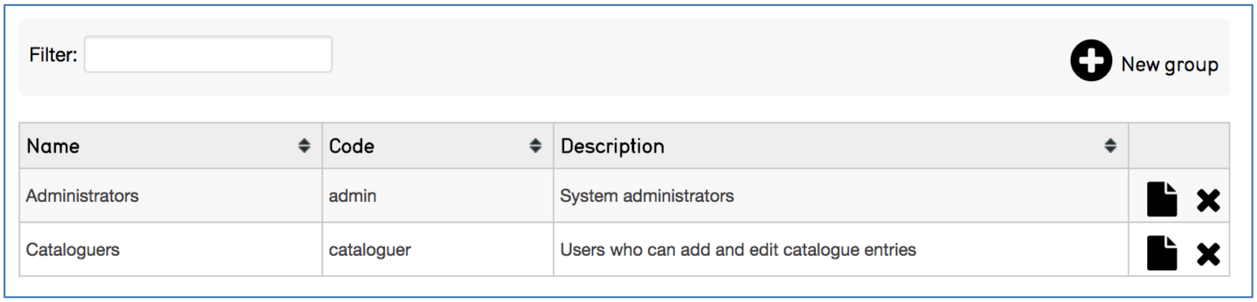



Fig 4.9: User groups list

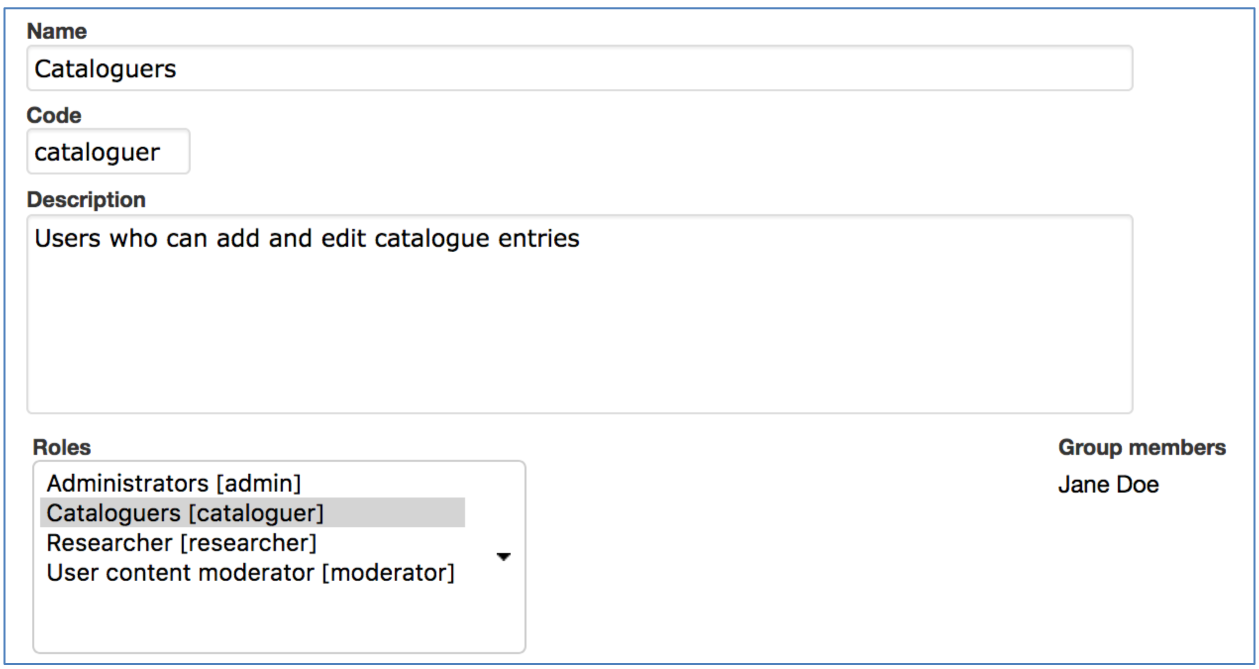



Fig 4.10: User group form

Once groups are defined, you may begin to add users. The group can then be used to provide members access to sets, forms and displays.

## Access Roles

Just as with User Groups, the Access Roles you assign to users must be defined in a separate screen. Click on "Access Roles" in the left-side navigation and a screen will display for roles management.

| Name | Code | Description | |
|---|---|---|---|
| Administrators | admin | Confers actions needed by those administering the system | |
| Cataloguers | cataloguer | Confers actions needed by those editing catalogue entries | |
| Researcher | researcher | Allows users to only search and view - but not edit - catalogue entries | |
| User content moderator | moderator | Allows users to moderate user generated tags and comments | |

Fig 4.11: List of Access Roles

## Defining Access Roles

To view the permissions set for a given role, click the edit icon. There are four components to roles: Actions, Metadata, Types and Pawtucket. These are represented in four tabs on the Access Roles screen.

**Actions:** Define various types of system privileges, such as whether or not a user has permission to manage displays.

**Metadata**: Defines whether a user has "no access", "read-only access" or "read/edit access" on a per-field basis. This is useful if there is a particularly sensitive field that you want a cataloguer or researcher to be able to see but not change.

**Types**: Defines whether a user has "no access", "read-only access" or "read/edit access" on a record type basis.

**Pawtucket**: Defines the level of record access users logged into the front-end site, Pawtucket, are able to see. [The NB museums application does not use this.]

Access Roles can prevent certain users from deleting records, changing preferences or using certain plug-ins. You may define as many Access Roles as you wish and your users can be assigned as many roles as are appropriate.

If you're unsure of the purpose of any field as you are creating your access roles, you can hover your mouse over it to get a definition. This holds true for actions throughout the system.

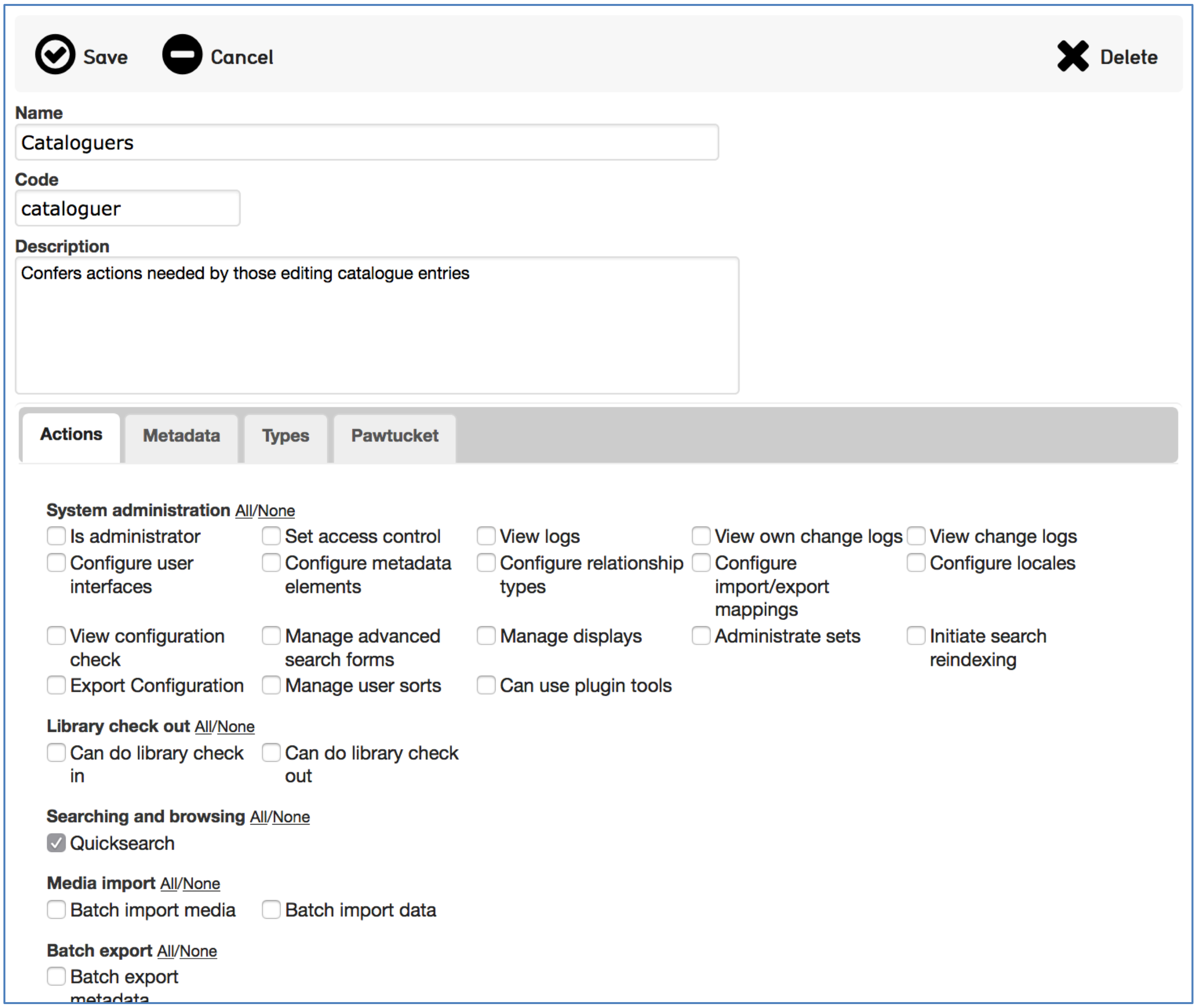



Fig 4.12: Roles Form: Actions Tab

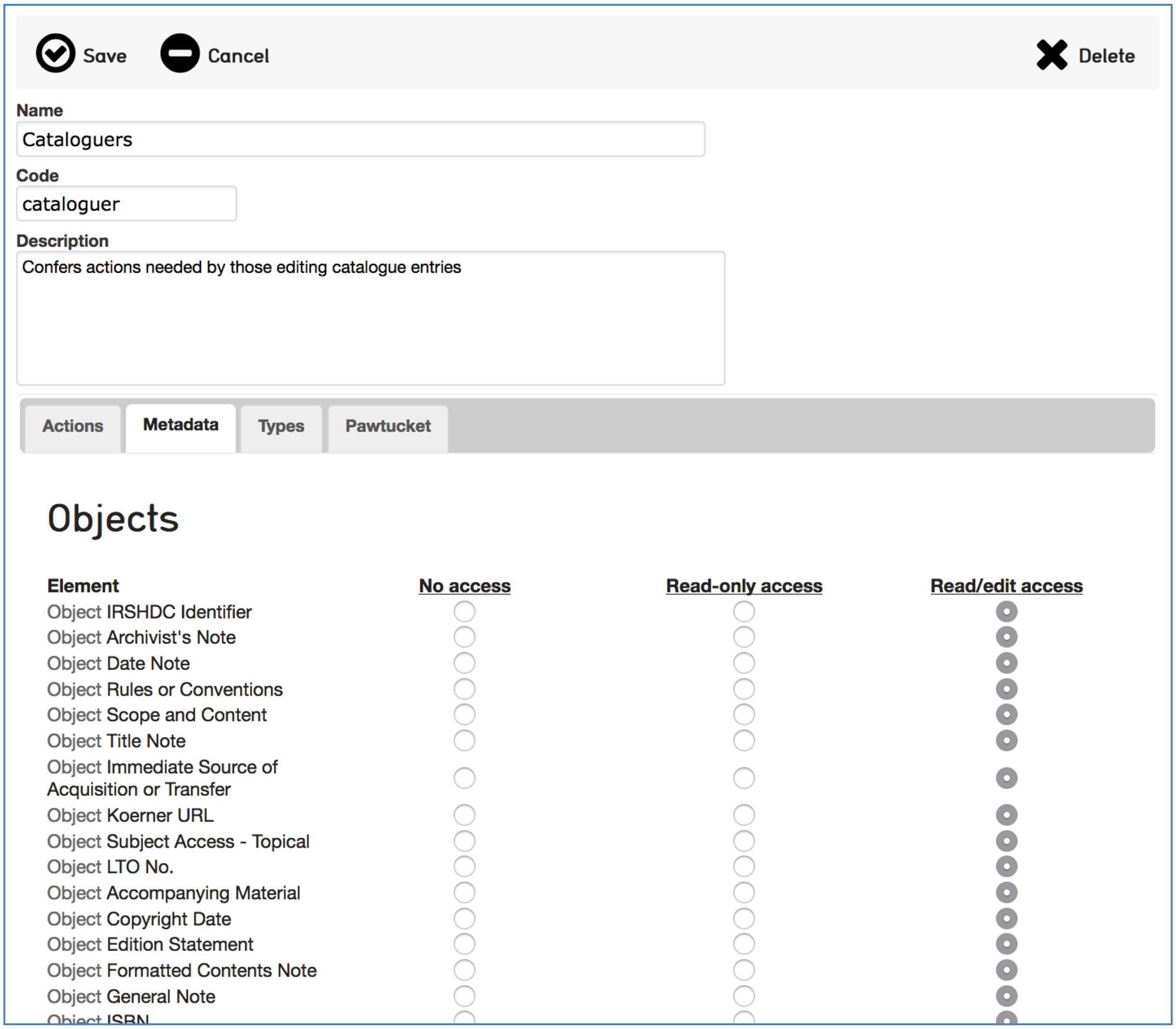


Fig 4.13: Access Roles Form: Metadata Tab

## 4.13 Logs

Logs are a series of reports to monitor system activity including cataloging changes, login activity, search and download. The following logs are available:

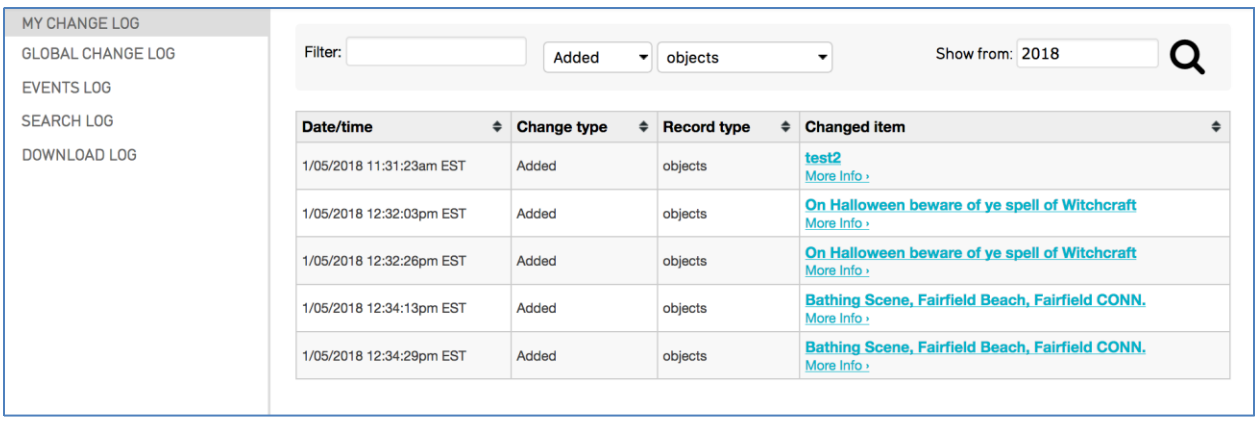
- ***My Change Log* –** Provides a summary of the current users cataloging activity. The list can be filtered by search term and limited by change type, record type and date.

- ***Global Change Log* –** Provides a system wide summary of cataloging activity. Similar to My Change Log, the Global Change Log can be filtered by search term and limited by change type, record type and date.

- ***Events Log –*** Provides a system wide summary of events, such as successful and failed login attempts. The list can be filtered by search terms and limited by date.

- ***Search Log –*** Provides a system wide summary of executed searches, including searches executed through the front-end Pawtucket website. The log provides the date/time, searched upon table, search term, number of hits, user (when available), IP address of user, source and execution time. The list can be filtered by search terms and limited by date.

- ***Download Log –*** Provides a system wide summary of downloads, including downloads executed through the front-end Pawtucket website. The log provides date/time, record type, record title, user (when available), user class (when available), IP address of user and source (Pawtucket or Providence). The list can be filtered by search terms and limited by date.




4.14 Example My Change Log list

## 4.14 Administration

The Administration menu, typically used only by system administrators, takes you “underneath the hood” of CollectiveAccess. This is where User Interfaces, Metadata Elements, and Relationship types are managed. It’s also where some system maintenance is performed.

More information on [Administration](http://docs.collectiveaccess.org/wiki/User_Interface_Administration) can be found here:
[http://docs.collectiveaccess.org/wiki/User_Interface_Administration](http://docs.collectiveaccess.org/wiki/User_Interface_Administration)

# Chapter 5: Links to additional information

## 5.1 User Interface Configuration

There are several configuration options that can be set system wide or for individual users that can improve cataloging efficiency for complex editing interfaces. These configuration options are set via *Manage > Administration> User Interfaces.* If your account does not have access to administration configuration please contact your system administrator.

**Creating User Interfaces**

It is possible to make multiple User Interfaces for record types that are geared to specific cataloging tasks or users' working style. For example, if a cataloger is responsible for entering data in only a small subset of metadata elements for a record, a new User Interface can be configured with only those elements to support that specific workflow.

When creating User Interfaces, access to User Interfaces and User Interface screens can be set at the individual, group and role level to limit availability to subsets of users. Individual users can select the User Interface they prefer in *Manage > My Preferences > Editing*.

Similarly, users can select User Interfaces for use in Quick Add forms in *Manage > My Preferences > Quick Add.* Creating custom User Interfaces for Quick Add screens can be very useful for ensuring a core subset of information is entered during the Quick Add process.

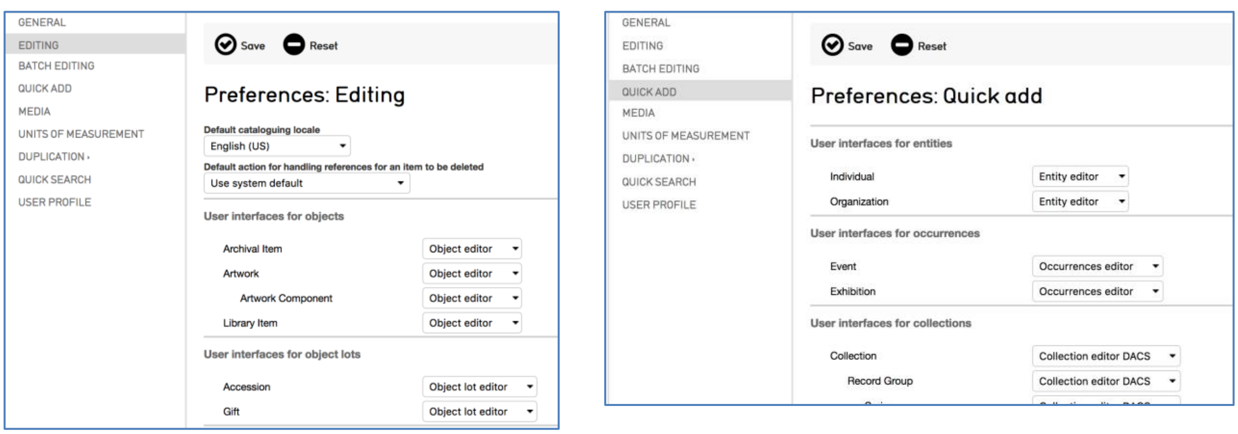



Fig 5.1: Selecting preferred user interface for record types in *Manage > My Preferences > Editing* and *Manage > My Preferences > Quick Add*

### Configuring Metadata Elements in User Interfaces

To adjust the configuration of a metadata element within a User Interface, first edit a User Interface and select the screen the metadata element appears on. Access metadata element configuration options by clicking the information icon alongside element names in the list of “Elements to display on this screen”. Settings are specific to the placement of the element within the current User Interface and will not apply to all placements of the element throughout the system.

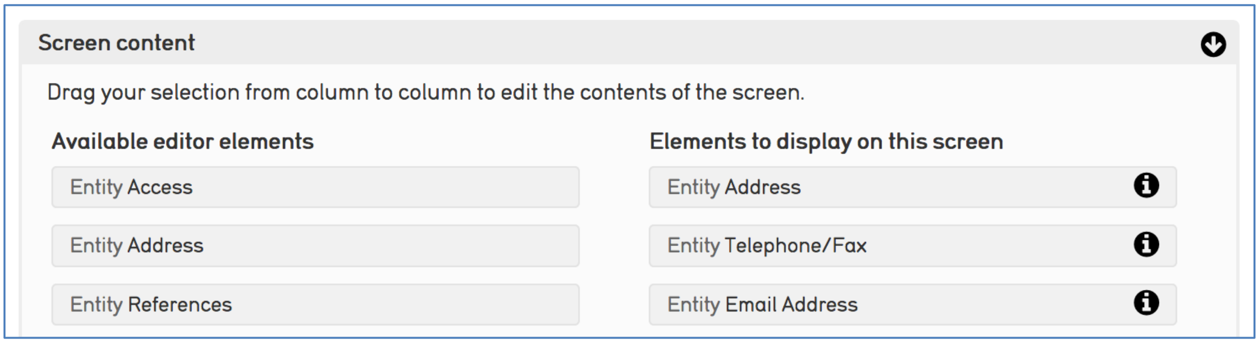



Fig 5.2: Selecting and configuring metadata elements in *Manage > Administration > User Interfaces.* Clicking the information icon reveals configuration options for elements within the User Interface screen.

The following selection of options may be useful for customizing complex User Interfaces.

**Expand/ Collapse Metadata Elements:** Metadata elements within all editors can be expanded and collapsed by clicking the arrow icon to the right of each element’s label. Users can configure metadata elements to be expanded or collapsed by default when forms are loaded. In the information window for metadata elements in a User Interface you will find two options, “Expand collapse if value exists” and “Expand collapse if no value is present”. Both settings have the following options: Don’t force (default), Collapse, Expand.

**Configure Help Text and Documentation Links for Metadata Elements:** Help text and links to documentation for metadata elements can be configured for elements or for elements within the context of a specific User Interface. Help text appears when users hover over the element title and links to documentation are available when clicking the information icon alongside the title of an element.

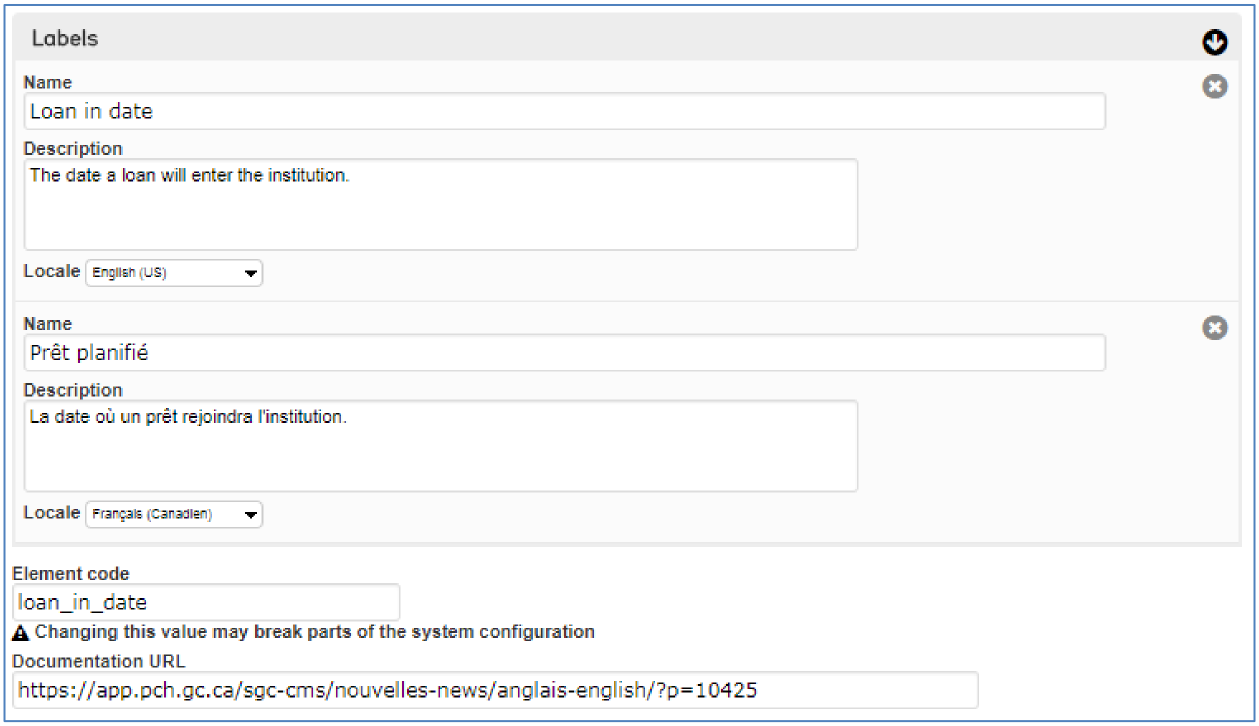



Fig 5.3: Element help text entered in *Description*. Documentation URL field for links to online documentation.

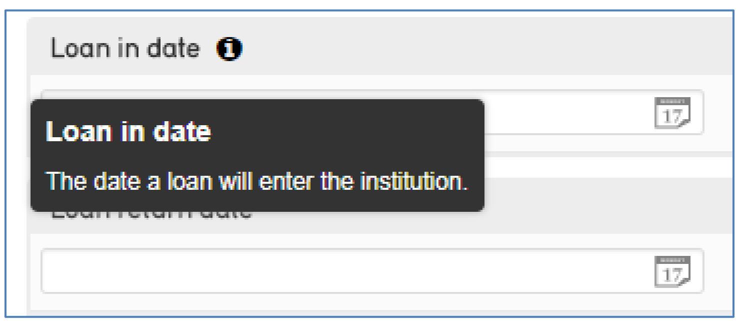



Fig 5.4 Help text appearing during hover over field name. Information icon linked to URL in "Documentation URL" for the element

Text entered in the "Description" field and links entered in the "Documentation URL" field for metadata elements in *Manage > Administration > Metadata Elements* are available wherever the element is used in a User Interface. Text entered in the "Descriptive text for bundle" and "Documentation URL" fields in the configuration options for elements within a User Interface screen in Manage > Administration > User Interfaces will only appear for that specific User Interface and will override the Metadata Element description and documentation URL.

## 5.2 Search Syntax

http://docs.collectiveaccess.org/wiki/Search_Syntax

## 5.3 Date and Time Formats

http://docs.collectiveaccess.org/wiki/Date_and_Time_Formats

## 5.4 Keyboard Shortcuts

http://docs.collectiveaccess.org/wiki/Keyboard_shortcuts

## 5.5 Display Templates

*Display templates* are used to format data for display on screen, output into reports and presentation in search results. Display template syntax is documented on the CollectiveAccess wiki:
http://docs.collectiveaccess.org/wiki/Display_Templates_Tutorial
http://docs.collectiveaccess.org/wiki/Display_Templates