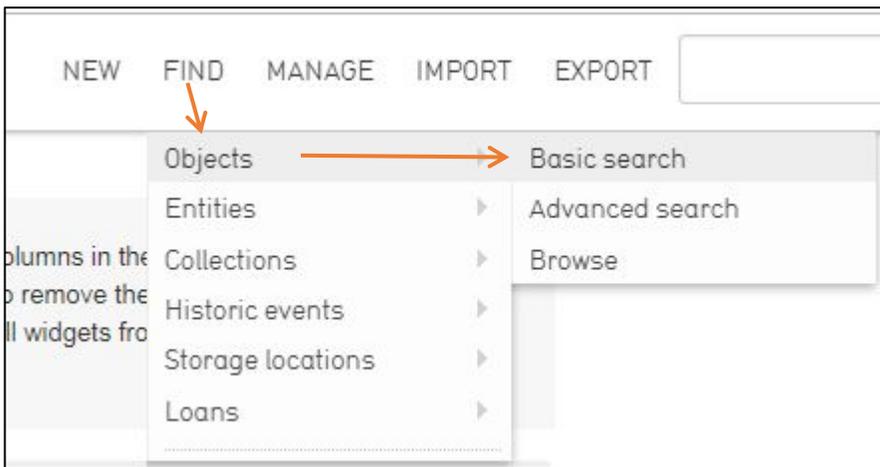


Creating a set in Collective Access

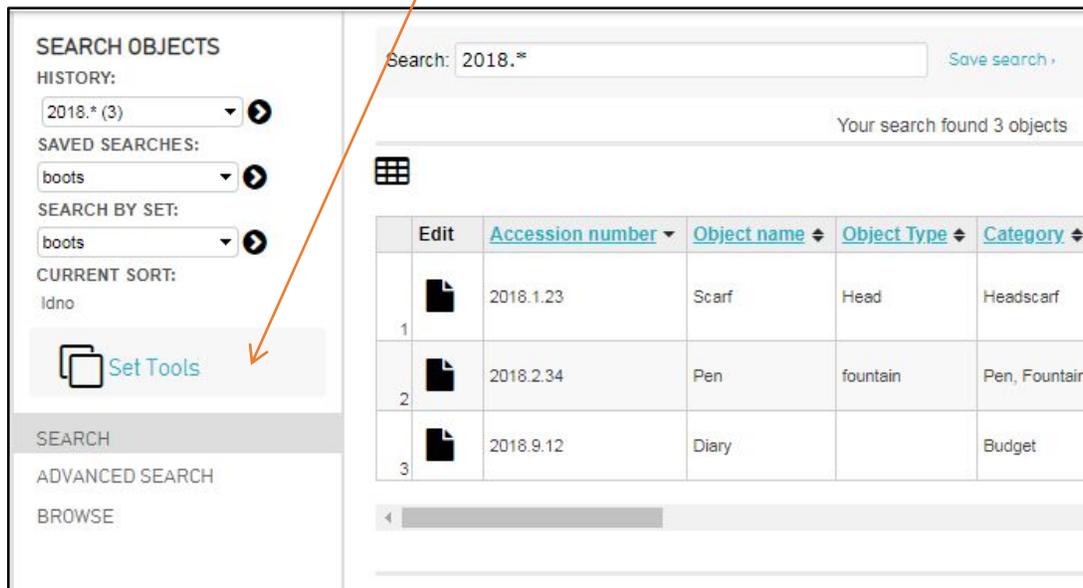
The following will show you how to search for, add, and save a list of artifact records for exporting to Artefacts Canada.

1. Creating the Set for the first time

There are a number of ways to search for artefact records for this list: you may have kept a list of accession numbers, or you may want to search for a list of the latest records that have been accessioned. Regardless of your preferred method, we will use the **Find > Objects > Basic Search** to get records into a Set.



- Perform a search. You can search by unique accession number or even all records accessioned this year (we will show other methods later).
- To begin a new Set click on **Set Tools**



You'll notice that there are now checkboxes beside along each search result and new options appear where Set Tools used to be.

The screenshot shows a search interface with a sidebar on the left and a main content area on the right. The sidebar contains search filters and a 'Create set' dialog box. The main content area shows search results for '2018.*' with 3 objects found. The 'Create set' dialog box is highlighted with a red circle and contains the following fields:

- Add checked to set:** boots (dropdown), [Toggle checked](#), Add >
- Create set:** 2018.* (text input), from results (dropdown), Create >
- Open set for batch editing

The search results table is as follows:

| | Edit | Accession number | Object name | Object Type | Category |
|--------------------------|--------------------------|------------------|-------------|-------------|---------------|
| <input type="checkbox"/> | <input type="checkbox"/> | 2018.1.23 | Scarf | Head | Headscarf |
| 1 | <input type="checkbox"/> | 2018.2.34 | Pen | fountain | Pen, Fountain |
| 2 | <input type="checkbox"/> | 2018.9.12 | Diary | | Budget |
| 3 | <input type="checkbox"/> | | | | |

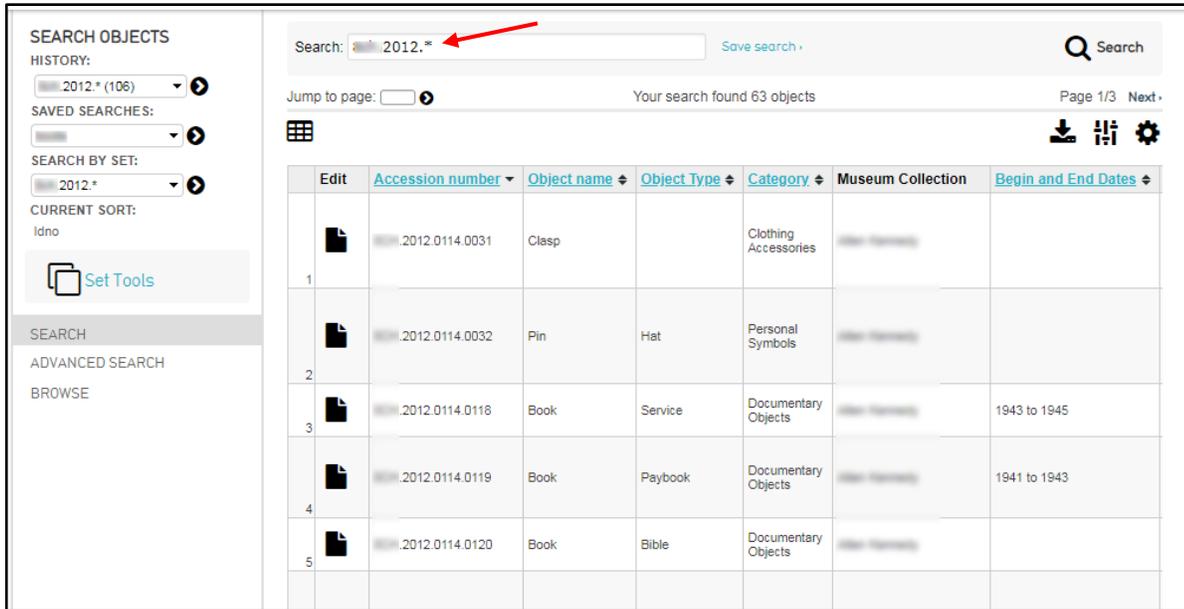
- In the **Create Set** dialog box give your Set a meaningful name; in our case we could use "Artefacts Canada 2018-2019".
- In the dialog box below that you can select to add all the results from the current search ("from results") or check the boxes of the records that you want to use for this set and select "from checked" in the drop-down menu.
- Click on "**Create**" to create your new set.
- You should get a pop-up announcing that the set has been created

That's it, you've created a new set. Now it's time to add any additional records to the set that will be uploaded to Artefacts Canada.

2. Adding records to an existing set

Basically, any record appearing in a search result list can be added to a set, once you click on Set Tools and get the checkboxes and the options to add to a set.

To keep things simple, we'll keep using **Find > Objects > Basic Search** to search for records. As mentioned earlier you can use a unique accession number and get one result. Another option is to do a search of the most recent records accessioned at your museum. This is done using a wildcard search, which is a search using the asterisk "*". Depending on your accession numbering system (some museums have a prefix before the year) the search term may be different but the basic principle is the same – adding an asterisk at the end of the search term to bring up all records catalogued in that year.



The screenshot shows a search interface with a search bar containing '2012.*' and a 'Save search' button. Below the search bar, it indicates 'Your search found 63 objects' and 'Page 1/3'. A table of search results is displayed with columns: Edit, Accession number, Object name, Object Type, Category, Museum Collection, and Begin and End Dates. The table contains five rows of results:

| Edit | Accession number | Object name | Object Type | Category | Museum Collection | Begin and End Dates |
|------|------------------|-------------|-------------|----------------------|-------------------|---------------------|
| 1 | 2012.0114.0031 | Clasp | | Clothing Accessories | | |
| 2 | 2012.0114.0032 | Pin | Hat | Personal Symbols | | |
| 3 | 2012.0114.0118 | Book | Service | Documentary Objects | | 1943 to 1945 |
| 4 | 2012.0114.0119 | Book | Playbook | Documentary Objects | | 1941 to 1943 |
| 5 | 2012.0114.0120 | Book | Bible | Documentary Objects | | |

Click on **Set Tools** and you will have the checkboxes available. Select the records that you wish to add to the Artefacts Canada set. Now, under **Add checked to set:** select the named Set (in our case "Artefacts Canada 2018 -2019") from the drop-down list.

And click on "Add"



The image shows a close-up of the 'Add checked to set:' dropdown menu. The dropdown is open, showing 'Artefacts Canada 2018 -2019' selected. Below the dropdown is a 'Toggle checked' link and an 'Add' button with a red arrow pointing to it.

You have added the records to that set.

3. Viewing the records in your set/making changes

To view the items in your set go to **Manage > My Sets > All sets**

To make changes to your Set, select the set to manage by clicking on the Edit icon at the end of its row.

SET STATISTICS:
 5 available to you
 7 created by users
 0 created by the public

SHOW SETS:
 Available to you Show

Search: Create new Public presentation containing collections

5 sets

| Name | Content type | Type | # Items | Owner | Access | Status | |
|---|--------------|----------|---------|--------------------------------------|--------------------------|--------|--|
| 8ch_2012_* (8ch_2012_*) | objects | User set | 106 | Bob Dumouchel (Bob.Dumouchel@gnb.ca) | not accessible to public | new | |
| Artefacts Canada 2018-2019 (Artefacts_Canada_2018-2019) | objects | User set | 10 | Bob Dumouchel (Bob.Dumouchel@gnb.ca) | not accessible to public | new | |
| boots (boots) | objects | User set | 46 | Bob Dumouchel (Bob.Dumouchel@gnb.ca) | not accessible to public | new | |
| Bowser (Bowser) | objects | User set | 304 | Bob Dumouchel (Bob.Dumouchel@gnb.ca) | not accessible to public | new | |
| on tour - 2018 (on_tour_2018) | objects | User set | 23 | Bob Dumouchel (Bob.Dumouchel@gnb.ca) | not accessible to public | new | |

Then click on **Items** from the tabs on the left

BACK TO LIST (2/5)

Viewing User set:
 Artefacts Canada 2018-2019 (Artefacts_Canada_2018-2019)

Number of items: 10
 Type of content: objects

Duplicate items in this set and add to current set

Owner: Bob Dumouchel

SET INFO
 ITEMS
 LOG

Save Cancel

Set title
 Artefacts Canada 2018-

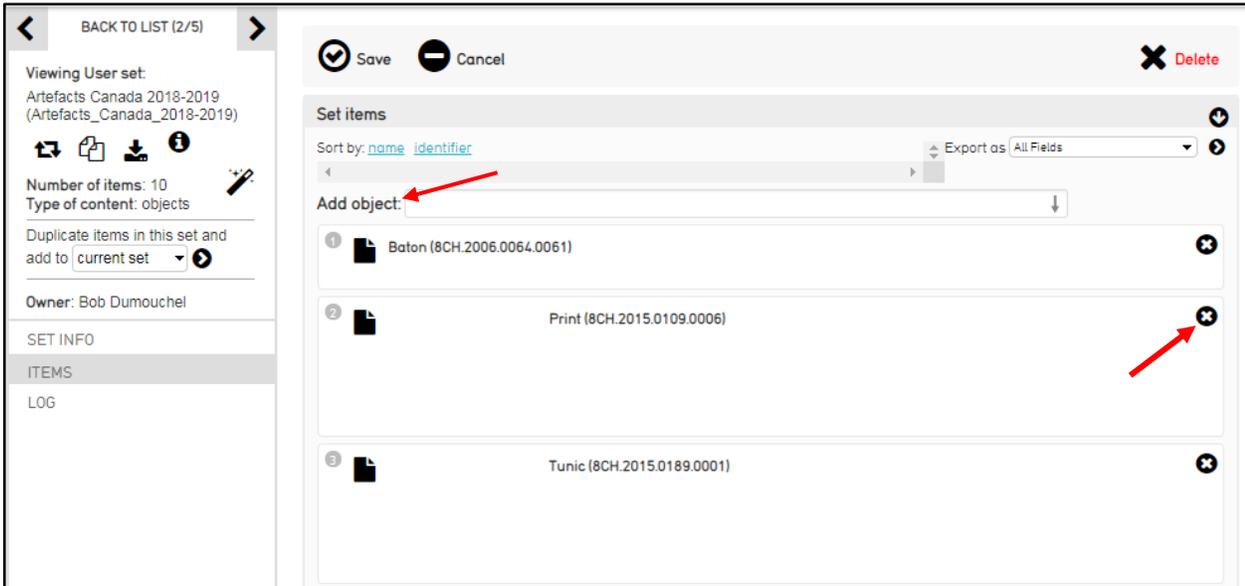
Locale Français (Canadien)

Add title

Set code
 Artefacts_Canada_20

Introduction

From here you can remove records by clicking on the "X". You could even add records by using Add object and entering the unique accession number



Remember to click on **Save** to save your changes.

4. New information in the Inspector area

When looking at a record for an object that has been added to a set you'll notice that the Inspector area adds that information to the record.

