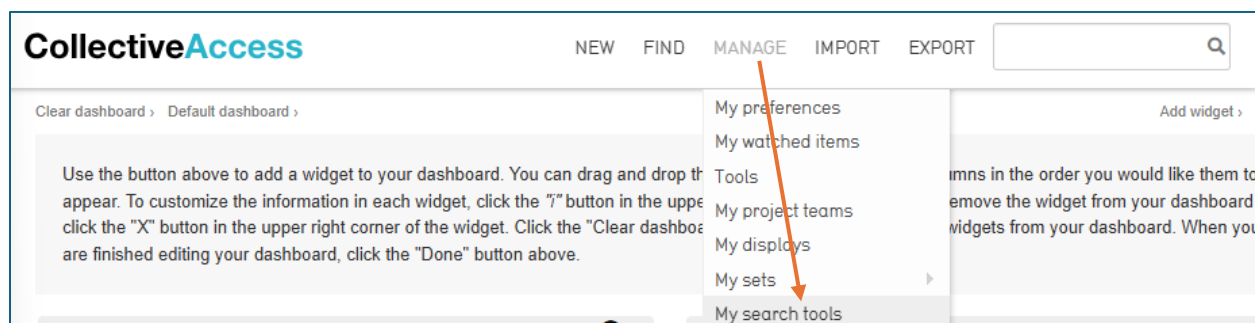


Creating a Search Form in Collective Access

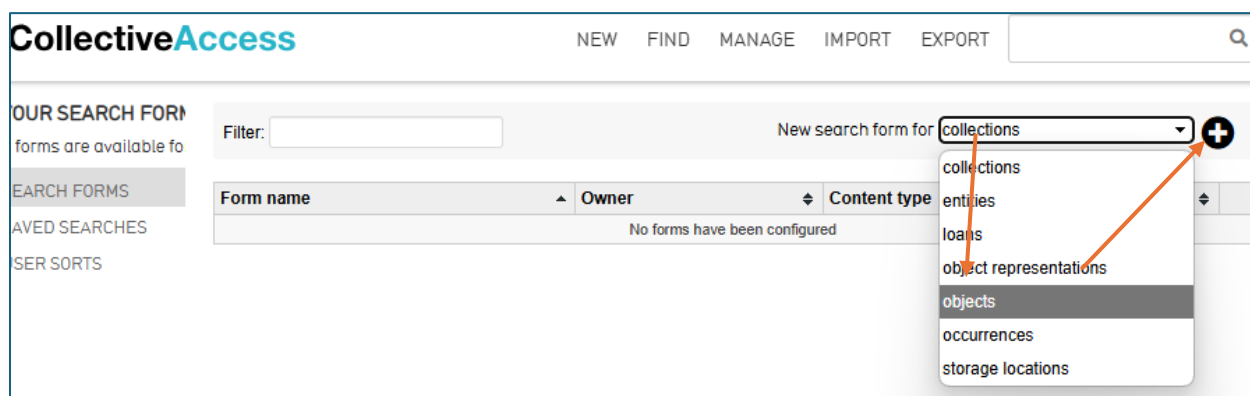
The following will demonstrate how to create a search form in Collective Access. Search forms are a necessary step to using the *Advanced Search* feature. While *Basic Search* allows users to perform very broad and general searches in the database, *Advanced Search* allows users to conduct more focused and specific searches. A search form can be created for collections, loans or entities in your collection but for this guide, the focus will be creating search forms for artifacts.

1. Creating the Search Form

- a) There are many ways to search for an artifact, collection or entity on Collective Access, but creating a detailed Search Form makes it easier. To start, select **Manage > My Search Tools**.



- b) Next, go to the top right where it says, **New search form for**. Select *objects* from the drop-down menu, then press the plus button to the right to create a new form.



c) Next, fill out the following sections:

- a. Give the form a name under **Form name**. Something that will be easy to recognize when selecting from other forms.
- b. There is an option for **Form Code**, but it is not necessary to input anything.
- c. Next, **Is system form**, select **Yes**. This allows others to use the form.
- d. Finally, choose from the list of **search form contents**. This step specifies which fields will be included in the search form. It can be as simple or as detailed as desired. To add them to the form, click on the field from **Available search items**, and drag it to **Items to search**. Some potential fields to include are: **Object Titles** (note that this is the system name for the *Object Name* field), **Object Marks/Labels** and **Object Material**. This section can be edited as needed.

The screenshot displays a form configuration interface with the following sections and elements:

- Form name:** A text input field containing "Detailed Artefact Search". It is highlighted with a red box. Below it is a "Locale" dropdown set to "English (US)" and a "+ Add form name" button.
- Form code:** An empty text input field, highlighted with a red box.
- Is system form:** A dropdown menu set to "Yes", highlighted with a red box.
- Search form contents:** A section titled "Search form contents" with a downward arrow. It contains the instruction "Drag your selection from column to column to edit the contents of the search form." and two columns:
 - Available search items:** A list of items including "Object Assemblage Zone", "Object Bag number", "Object Begin and End Dates", "Object Bob's Special Field", and "Object Box number". This column is highlighted with a red box.
 - Items to search:** A list of items including "Object Title", "Object Marks/Labels", and "Object Material". This column is highlighted with a red box.

An orange arrow points from "Object Begin and End Dates" in the "Available search items" column to "Object Marks/Labels" in the "Items to search" column.

- e. Afterwards, scroll down to the last few settings to **Search form settings**. The default is set to three (3) columns for display. Changing this will adjust the way that the form is displayed on the screen.
- f. Next are **Type restrictions**. This will say **Artifacts** since that is the type of search form being created, and can be left as-is.

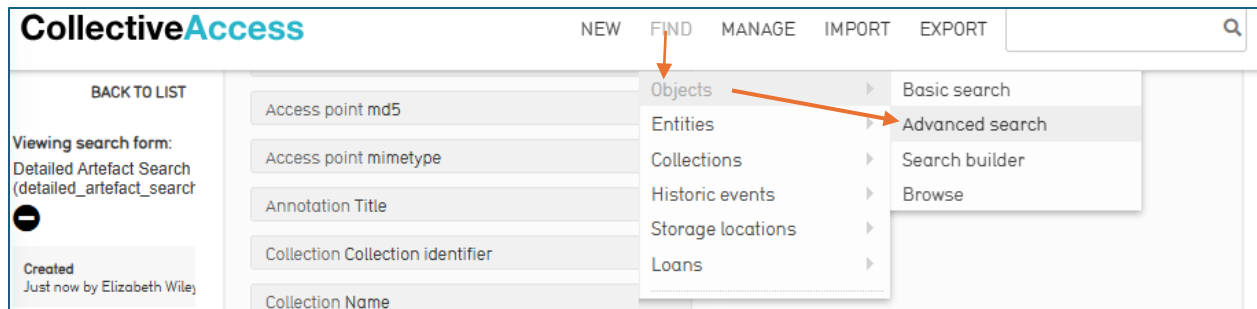
The screenshot shows two sections of a configuration form. The first section, titled "Search form settings", contains a label "Number of columns in form" and a text input field with the value "3". The second section, titled "Type restrictions", contains a dropdown menu with "Artifact" selected and an "Include subtypes?" checkbox which is unchecked. Both sections have a downward arrow icon in the top right corner.

- g. The next section will allow additional users or groups of users to edit the form. Click **Add user access** or **Add group access** and type in the name or email of the user(s). Then select if they can **read** or **edit** the form.
- h. Last, click **Save** at either the top or bottom of the page. Reminder that the system will display a prompt if there are any unsaved changes to the form.

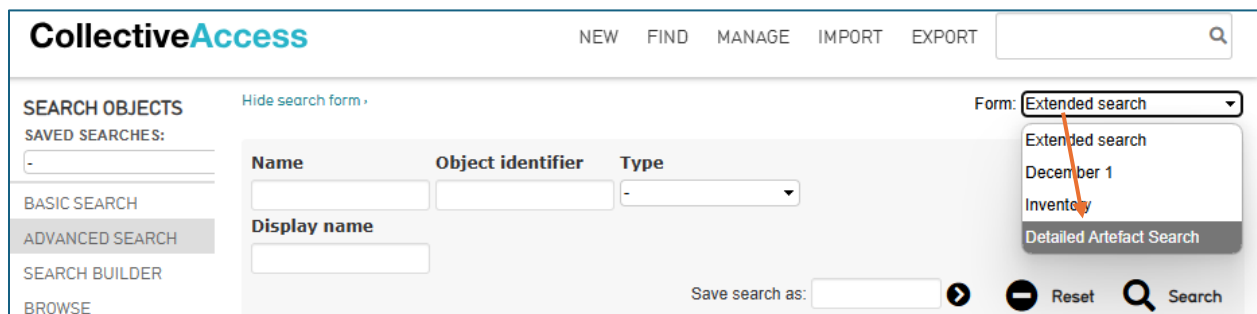
The screenshot shows the "User access" section with a red box highlighting the "Add user access" button. Below it, a user "Anja Hamilton (anja.hamilton@gnb.ca)" is listed with a "can edit" permission level. The "Group access" section below it has an "Add group access" button. At the bottom of the form are "Save" and "Cancel" buttons with checkmark and minus icons respectively.

2. Finding the Search Form

- a. Once the form is saved, go to **Find > Objects > Advanced Search**.

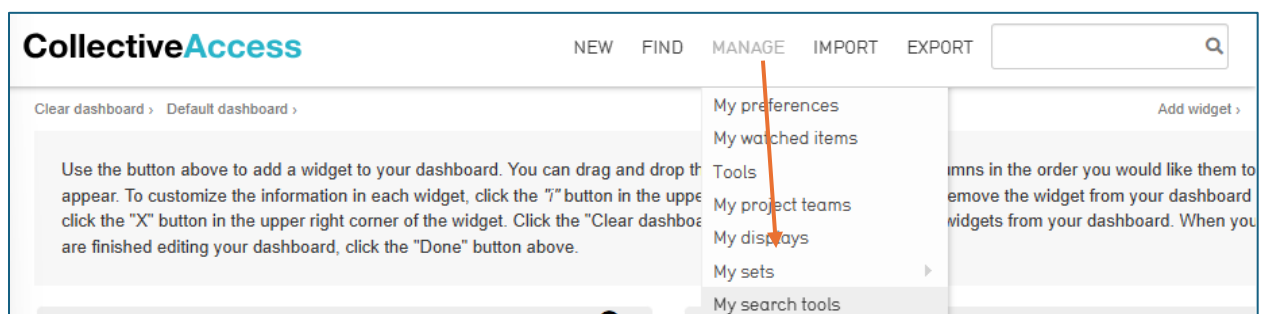


- b. The default advance search form, **Extended search** will be shown typically. To access the newly-created form, go to the top right corner where it says **Form**, then from the drop-down menu, select the name of the search form. Proceed to use the form to search for artifacts in the database.



3. How to Edit The Search Form

- a. At any time the search form can be edited to add more search fields, adjust the number of columns, or change user access. Go to **Manage > My search tools**.



- b. On that page, there will be a list of all the search forms that have been created. Go to the far right of the column of the selected form and click on the **little page icon** next to the X. The icon will say **Edit**.

