



CollectiveAccess Manual

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1. Accessing and Navigating the Database

a. Accessing the Database

CollectiveAccess is a web-based system. That means that the work exists independently of individual museum computers. Your collection can be viewed and managed from any device that is connected to the Internet and runs the latest version of a browser such as Chrome, Firefox, Safari or Microsoft Edge. It also means that multiple people can work in the database at the same time. The database website is hidden, it will never appear in search engine results or otherwise be accessible to others, unless they have the direct URL and user account details.

Logging In

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

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



The screenshot shows a web browser window displaying the CollectiveAccess login interface. At the top, the logo consists of a large 'C' and 'A' in blue, with a diagonal line through them, followed by the words 'COLLECTIVE' and 'ACCESS' in black. Below the logo, the text 'Admiral Digby Museum' is centered. Underneath, there are two input fields: 'User Name:' with the text 'administrator' entered, and 'Password:' with four dots indicating a masked password. At the bottom left of the form is a circular button with a checkmark icon and the word 'Login' next to it.

Fig. 1.1: Logging into the Database

b. Navigating the Database

The Dashboard

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

Navigating the Dashboard

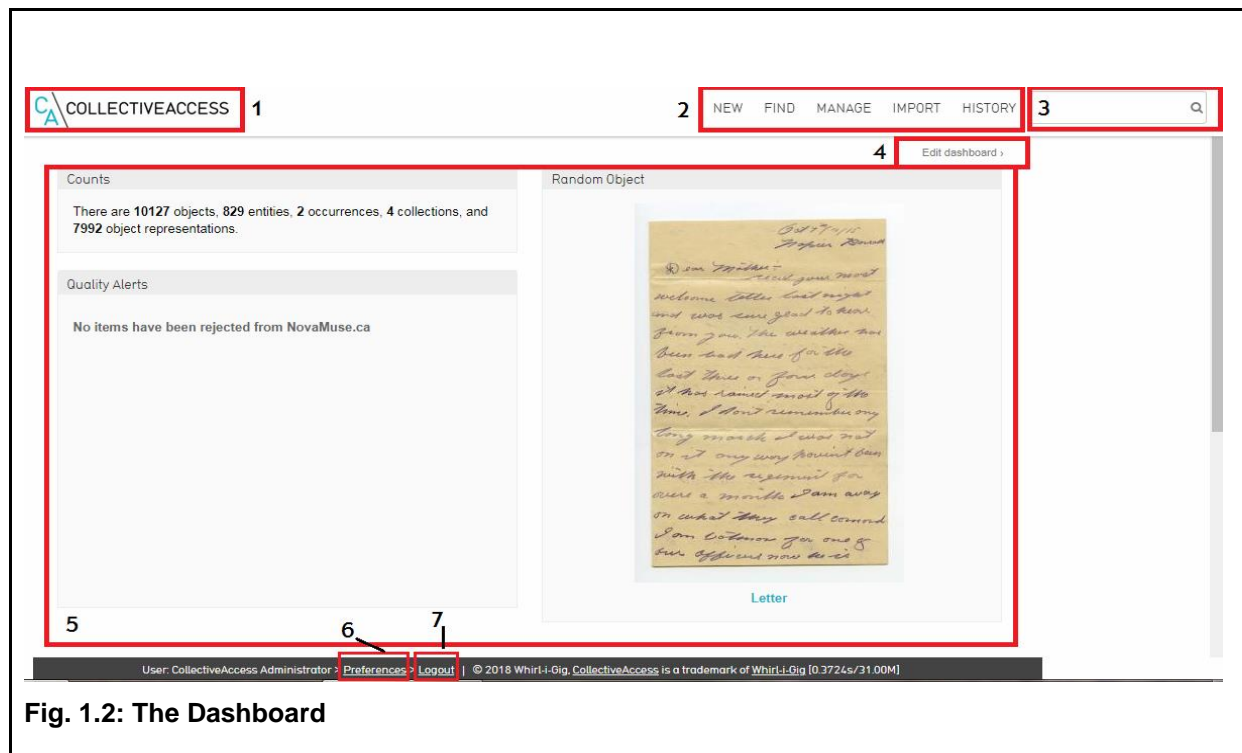


Fig. 1.2: The Dashboard

1. Home Logo

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

2. Global Navigation Bar

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

3. QuickSearch

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

4. Edit Dashboard Button

This button opens the “edit dashboard” menu, which lets you add, edit, move or delete widgets. Widgets, simple applications providing useful functions can be found on the [CollectiveAccess Support Wiki](#) under *Dashboard*.

5. Main Screen

The main screen displays all of your active widgets.

6. Preferences

Allows you to view and edit user preferences.

7. Logout

Logs you out of the system. Note that quitting your browser will not automatically log you out of the database.

Widgets and Editing the Dashboard

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

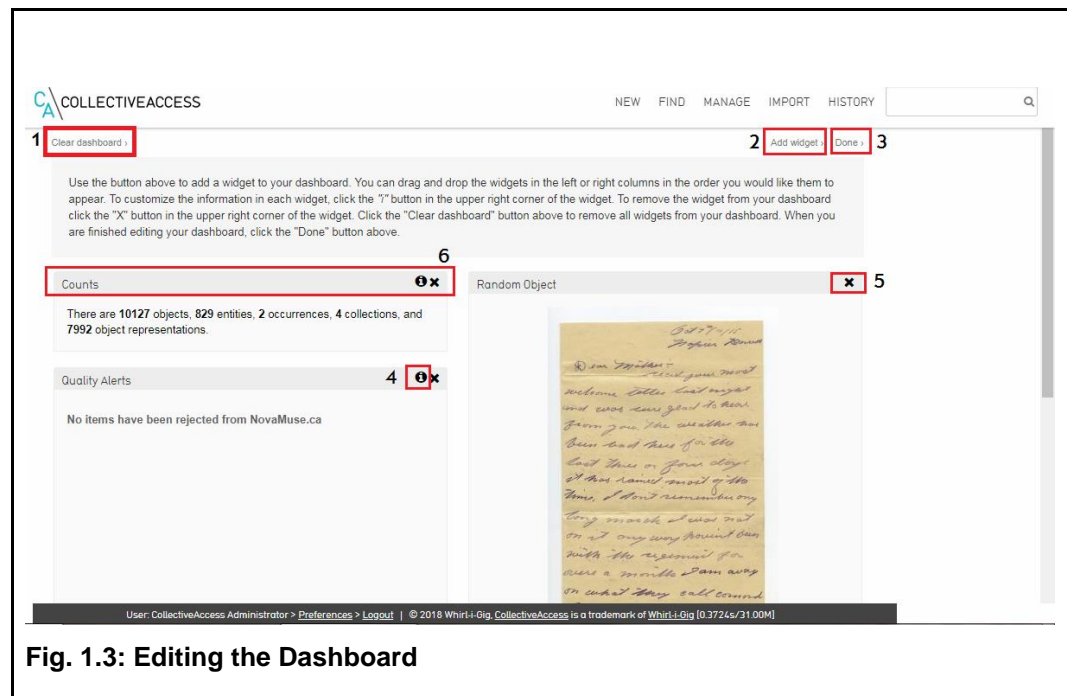


Fig. 1.3: Editing the Dashboard

1. Clear Dashboard

Clicking this button will remove all widgets from the dashboard.

2. Add Widget

Clicking this button launches the “add widget” screen, where available widgets can be selected from a list for display on your dashboard.

3. Done

Click this button when you are done editing to return to the regular view. Widgets may only be added to, removed from or moved around the dashboard while in editing view, and will not become functional until you click done.

4. Information Button

Clicking this button on any widget in the edit dashboard view allows you to view and edit the settings for the widget. For instance, in the clock widget it allows you to choose between viewing the clock as digital or as faux analogue, and whether or not to show seconds. In the recent changes widget, you can control the maximum age of displayed changes as well as the type of records for which changes will be tracked, ie looking at changes to object records within the past 24 hours.

5. Delete Button

Removes the widget from the dashboard. Widgets can always be re-added from the “add widget” screen.

6. Moving a Widget

Widgets can be reordered by clicking on the grey bar at the top of the widget window and dragging it to a different spot on the page.

There is also a [YouTube tutorial](#) which covers editing the dashboard.

The Global Navigation Bar

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

New

The “new” menu contains options for creating new records. This is where you go to create new artifact and archival records, representations, entities (family, individual, or organization), collections, historic events, storage locations, and loans.

Find

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

Manage

“Manage” allows you to control the way in which you use the CollectiveAccess system, from user preferences to organizing how information is displayed. These options do not relate directly to your collection, but rather to how your collections database is administrated. The options are impacted by user level.

History

Provides a list of recently viewed and edited records.

QuickSearch

This search bar allows you to quickly search by keyword across all records. To search for lots, enter the beginning of the accession number followed by * (i.e. 2017.1.*)

Help

The Help Menu allows you to view frequently asked questions (FAQs), a list of resources, and contact information for ANSM staff.

2. Objects

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

a. The Catalogue Worksheet

Understanding the Catalogue Worksheet

Information about an object is entered on the catalogue worksheet ([Fig. 2.1.1](#)).

Worksheets are the main way in which you enter your data into the CollectiveAccess system, and the worksheets for other types of data—for instance, entities, historic events and even storage locations—follow similar patterns.

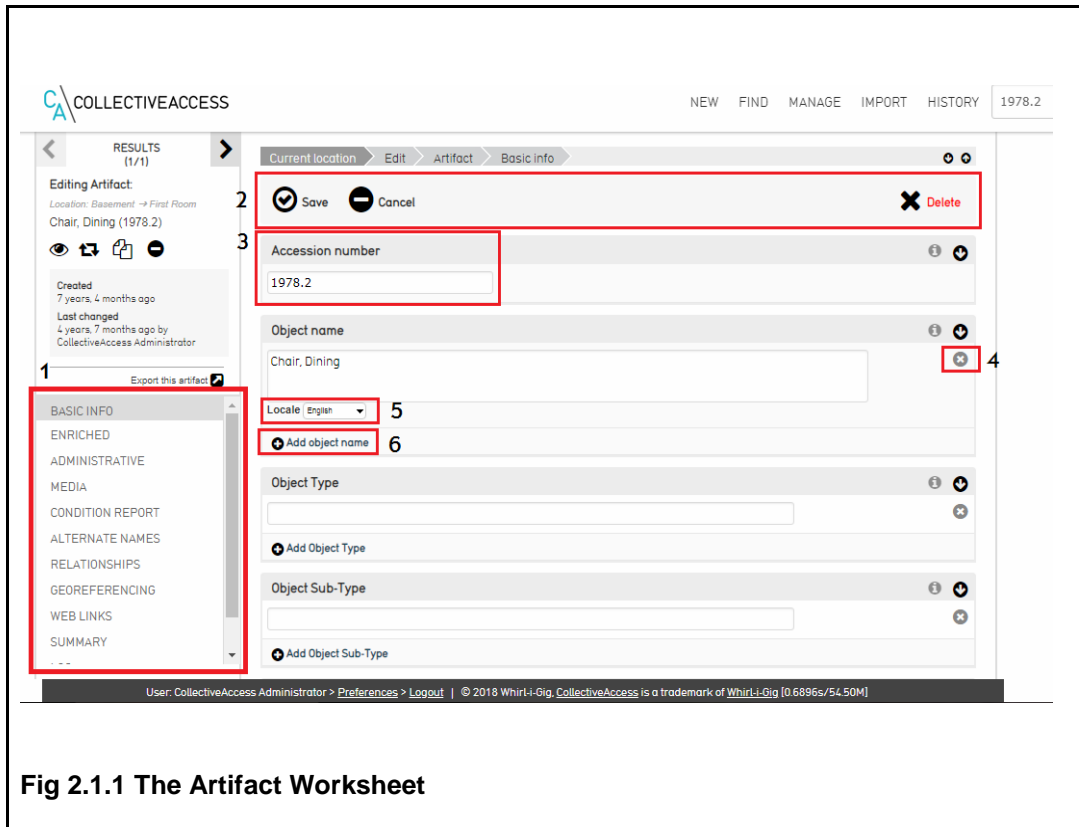


Fig 2.1.1 The Artifact Worksheet

1. Local Navigation

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

2. Control Bar

Options for saving and deleting the record and cancelling changes are located here. Records do not save automatically; you must remember to hit the save button after entering new information. However, if you do not and attempt to navigate away from a page with unsaved information, the system will remind you of the need to save. Not all users have permission to delete records. This is typically limited to administrator and/or curator accounts.

3. Field

Each record is made up of a series of named fields ([Fig. 2.1.1](#)). The information which is to be placed in each field is explained by the built-in data dictionary, which can be accessed by clicking 'i' next to the name of the field (See [Fig. 2.1.2](#) below). More detailed definitions, including cataloguer's rules and examples, can be found at the [CHIN Humanities Data Dictionary](#). See [Appendix A](#) for a list of definitions, as seen in CollectiveAccess.

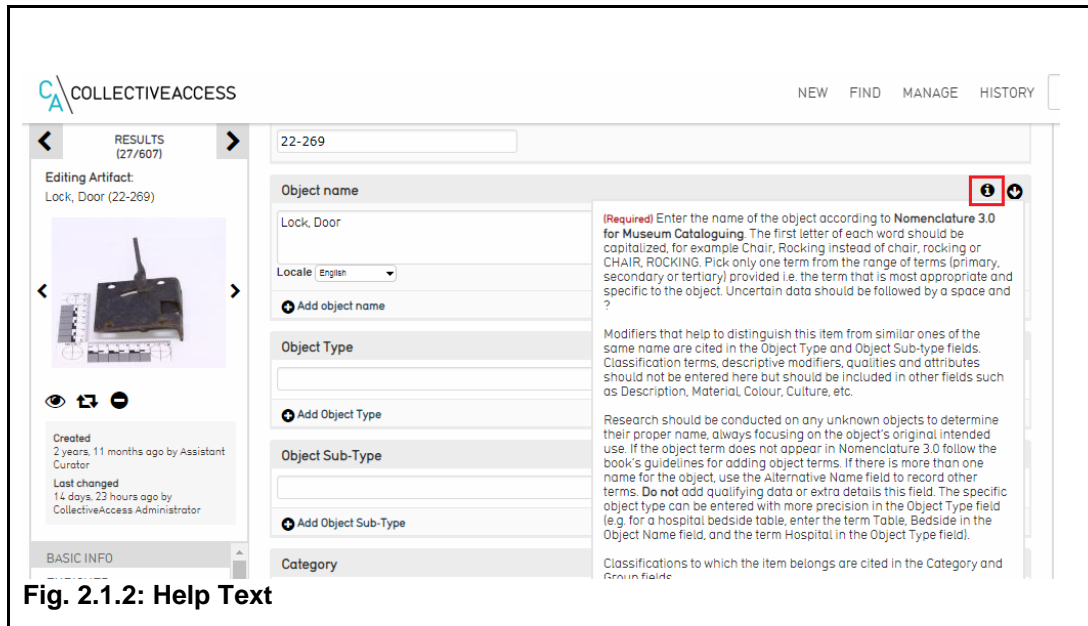


Fig. 2.1.2: Help Text

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

A [YouTube tutorial](#) on using the help text is also available.

4. Delete Button

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

5. Locale

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

The screenshot displays the 'Inspector Window' in the CollectiveAccess application. The window is titled 'COLLECTIVEACCESS' at the top. The main content area shows a photograph of a wooden toy horse with red wheels, labeled 'Toy, Riding (1988.32)'. The interface includes a top navigation bar with 'RESULTS (19/19)', a left sidebar with icons for view, edit, and other actions, and a right sidebar with fields for 'Accession number', 'Object name', 'Object Type', and 'Object Sub-Type'. Red boxes and numbers 1 through 6 highlight specific UI elements: 1 points to the top navigation bar, 2 points to the 'Editing Artifact' section, 3 points to the view icons, 4 points to the 'Created' and 'Last changed' metadata, 5 points to the 'Object Type' field, and 6 points to the main image area.

1. Results Control

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

2. Identifying Information

Displays the object type, name, and accession number.

3. Watch List Icon

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

4. Create Child Record Button

Clicking this button adds a new child record under the current (primary) record, connecting the records through a hierarchical order (parent > child). The [YouTube tutorial](#) provides step-by-step instructions.

5. Less/More Info Button

Collapses or expands the Inspector window.

6. Media Thumbnail

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

b. Entering Data

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

The process for creating each of these records is more or less the same; the only difference is in some of the fields available in the worksheet. To begin adding a new record, from the Global Navigation Bar click on New > Object > and the appropriate object type, i.e. "Artifact" ([Fig. 2.4](#)).

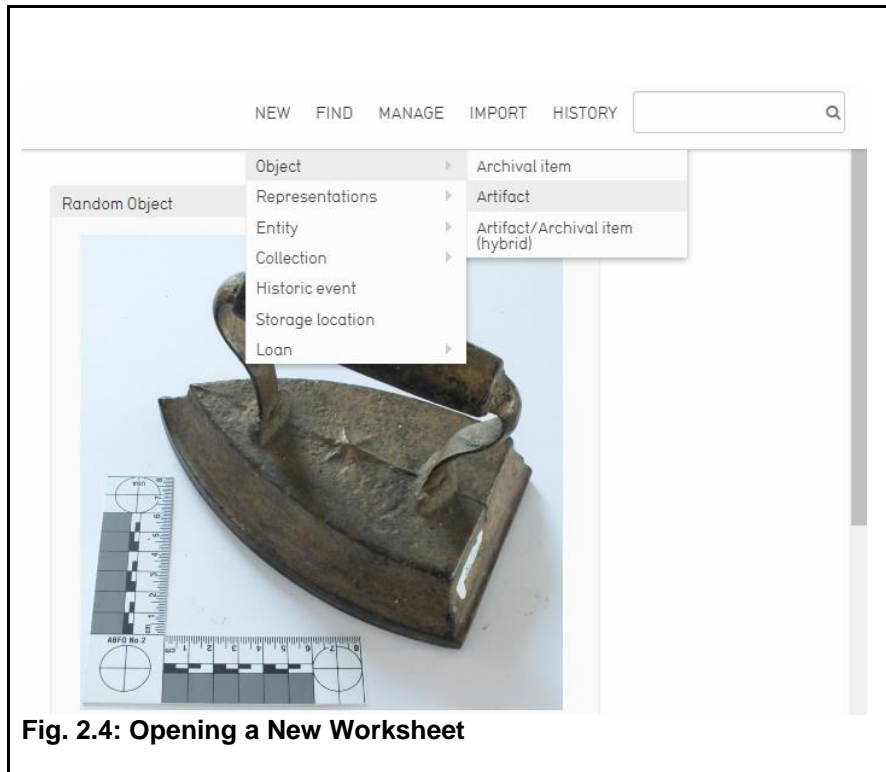


Fig. 2.4: Opening a New Worksheet

This will open a new blank catalogue worksheet. A [YouTube tutorial](#) covering the basic process of adding a new object is also available.

The Data Dictionary

Hovering your cursor over a field title will reveal the data dictionary entry for that field, providing you with a field definition and examples where appropriate. More detailed definitions, including cataloguer's rules, entry rules and extended examples can be found by using the [CHIN Humanities Data Dictionary](#). Another place to look is the built-in help text. This can be accessed above each field in a record by clicking the 'i' in the right-hand corner of each heading (see [Fig. 2.1.2](#)).

Screens

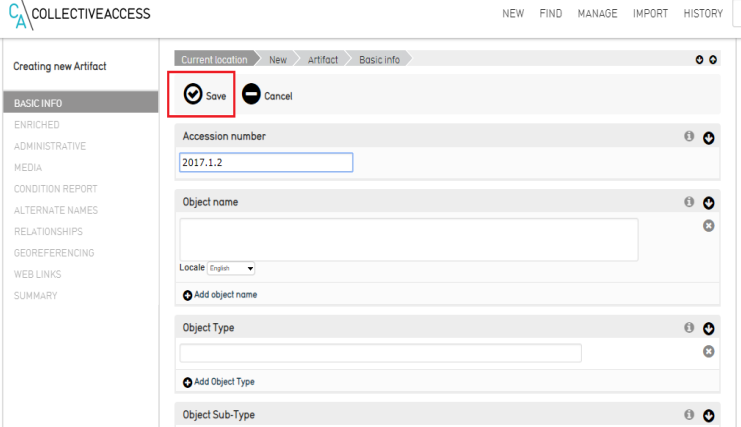
Each record contains a number of screens, each of which contain fields related to a different aspect of the object record. So, for example, the "administrative" screen contains fields such as accession and acquisition dates and cataloguer information. Both artifact and archival records contain the following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

Basic Info

This is the first page of the record and the one which you will initially be editing (see [Fig. 2.5](#)). It contains basic information about the object such as its accession number, name, and category. The "access" drop-down sets whether or not the record is accessible on [NovaMuse](#). "Status" allows you to tag the workflow status on a record, ie new, editing in progress, review in progress, or complete. This allows you to keep track of the entry status of your records, for example

quickly generating a list of all records which are not yet completely entered into the system or which require more work.

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



The screenshot shows the 'Creating new Artifact' interface. At the top, there's a header with the 'COLLECTIVEACCESS' logo and navigation links: NEW, FIND, MANAGE, IMPORT, HISTORY. Below the header, a breadcrumb trail shows 'Current location > New > Artifact > Basic info'. The main content area is divided into a left sidebar and a right form area. The sidebar lists various tabs: BASIC INFO (selected), ENRICHED, ADMINISTRATIVE, MEDIA, CONDITION REPORT, ALTERNATE NAMES, RELATIONSHIPS, GEOREFERENCING, WEB LINKS, and SUMMARY. The form area contains several fields: 'Accession number' with the value '2017.1.2', 'Object name' (empty), 'Object Type' (empty), and 'Object Sub-Type' (empty). Each field has an information icon and a refresh icon. Below the 'Object name' field, there's a 'Locate' dropdown menu and an 'Add object name' button. Below the 'Object Type' field, there's an 'Add Object Type' button. At the top of the form area, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box.

Fig. 2.5: Creating new artifact record, choose 'save' before moving to the next tab

Enriched

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

Entities are created separately from the catalogue worksheet and will be discussed in detail later in this document; however, you can access the relevant entity worksheet by clicking the underlined entity name after an entity has been attached. As you begin typing in this field the system will search the entity database and prompt you with possible matches (see [Fig. 2.6.1](#)). You can also select the entity's role (see [Fig. 2.6.2](#)).

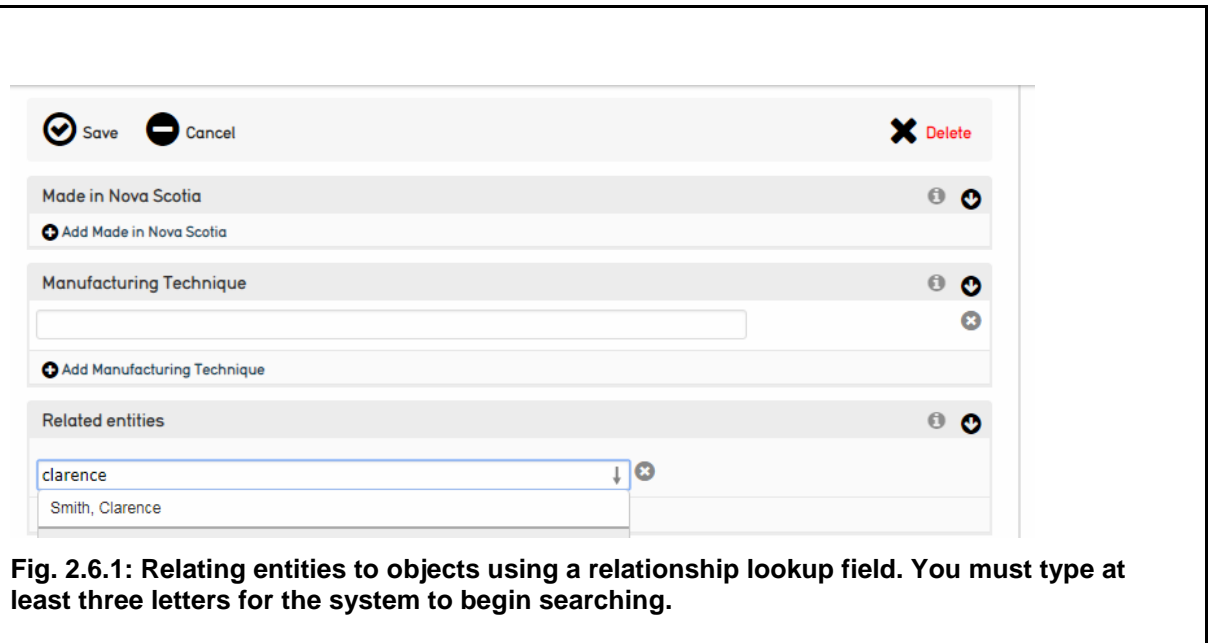


Fig. 2.6.1: Relating entities to objects using a relationship lookup field. You must type at least three letters for the system to begin searching.

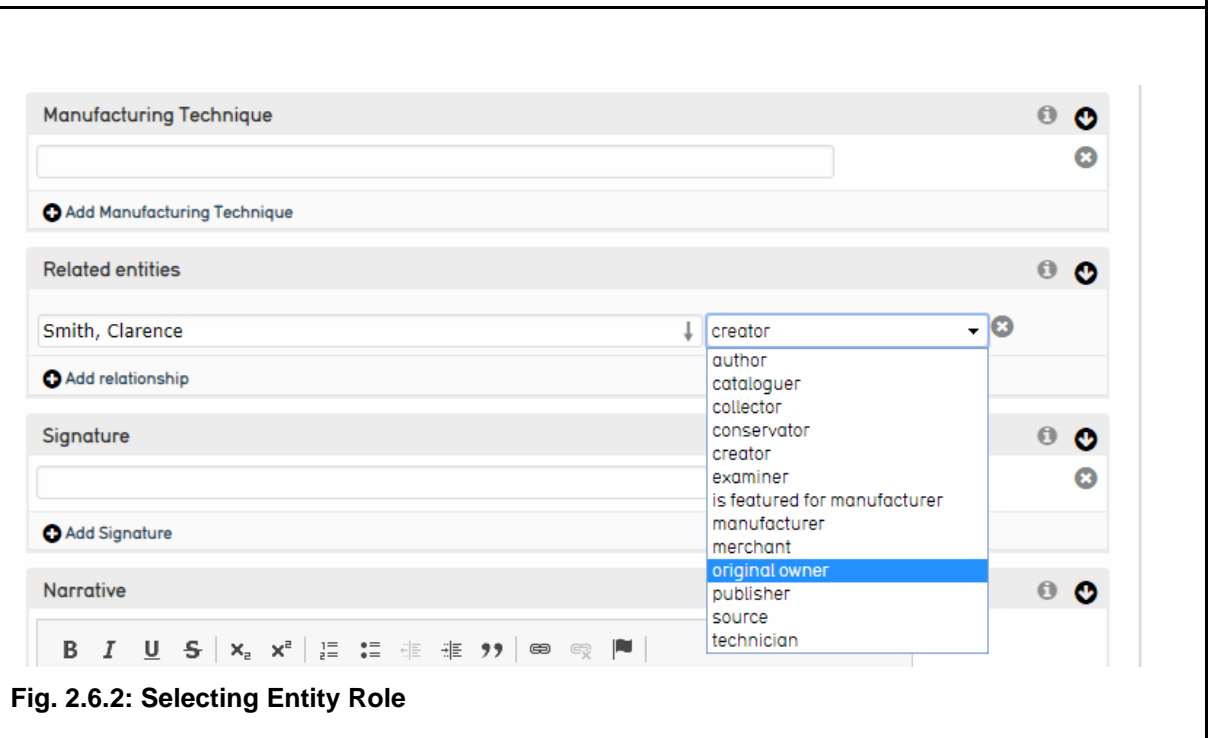


Fig. 2.6.2: Selecting Entity Role

The Made in Nova Scotia tab allows the user to link the record to a manufacturer or individual artisan or maker from Nova Scotia. Users are able to choose from 8000+ entities in a drop-down menu. Search for the beginning of a company name, first and/or last name, or location and the results will appear below (see [Fig. 2.7](#)). The Related Entities field is located beneath this. If the manufacturer was in operation outside of Nova Scotia, the user can add the manufacturer name as a related entity and choose the 'manufacturer' designation from the

drop-down menu that appears after the name has been entered. A [YouTube tutorial](#) for the Made in Nova Scotia tab is also available.

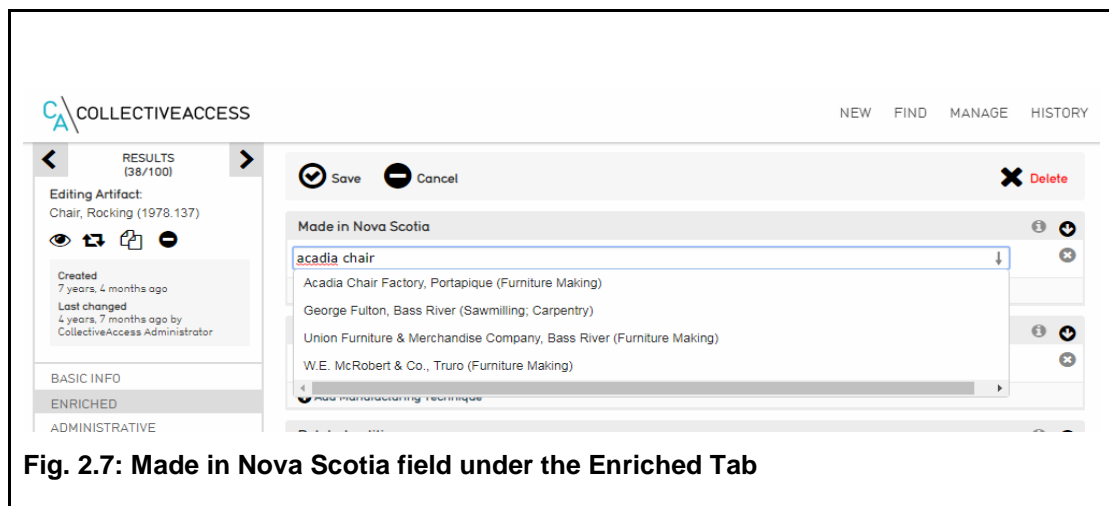


Fig. 2.7: Made in Nova Scotia field under the Enriched Tab

Administrative

This page contains fields for administrative use, such as location in hierarchy, accession date, exhibit history and information about object deaccessioning. Location in hierarchy lists the position of a record(s) in the object hierarchy. An existing record can be moved under a primary record under this tab. Click "Show Hierarchy" (see [Fig. 2.8](#))

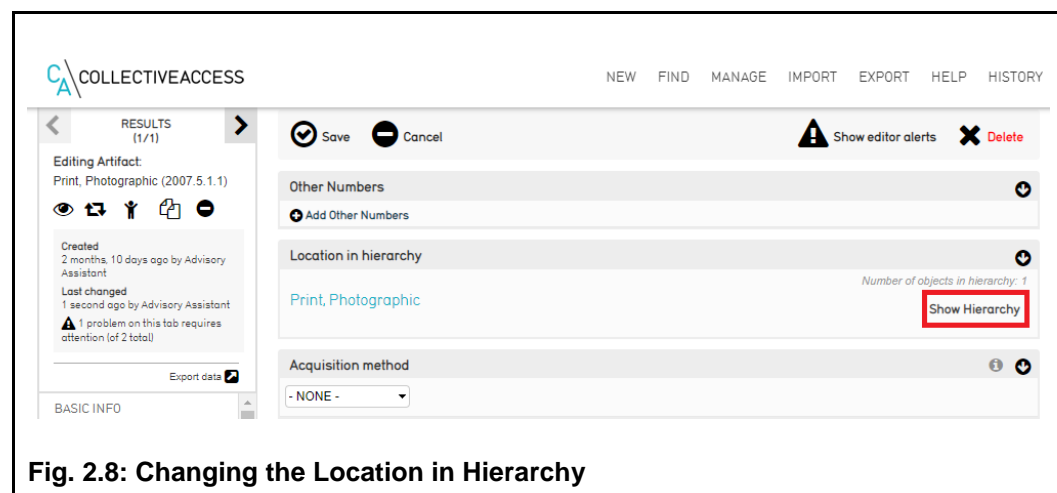


Fig. 2.8: Changing the Location in Hierarchy

Choose the Move tab listed at the top. Find the primary record by completing a key word search for the accession number (see [Fig. 2.9.1](#)). Choose the primary record from the search results. Click on the primary record once displayed and click save (see [Fig. 2.9.2](#)) The record is now a child record in the database.

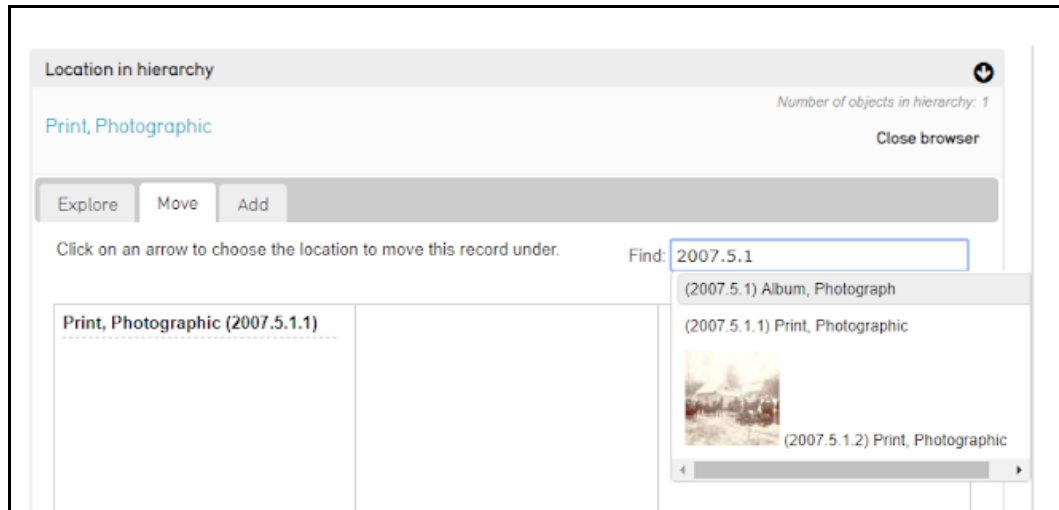


Fig. 2.9.1: Search for Primary Record

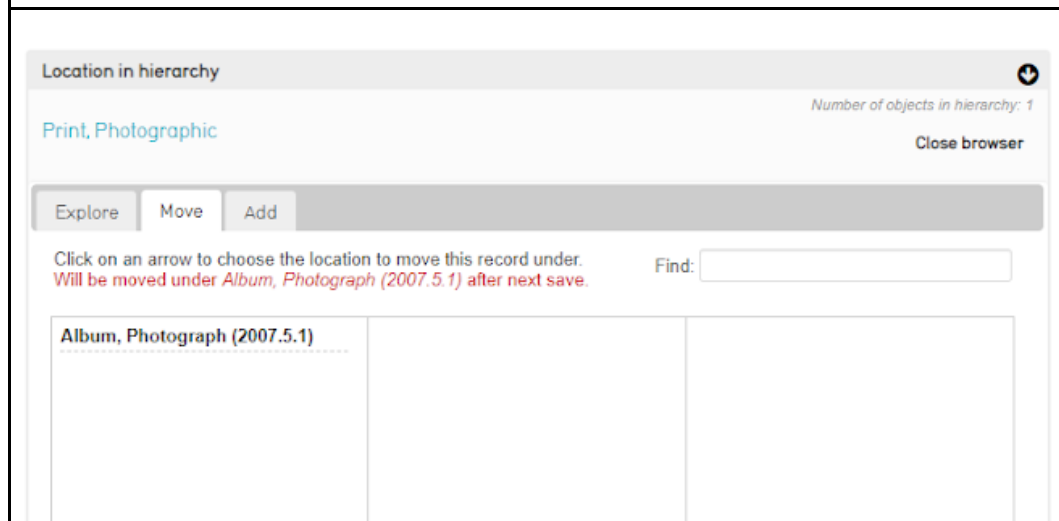
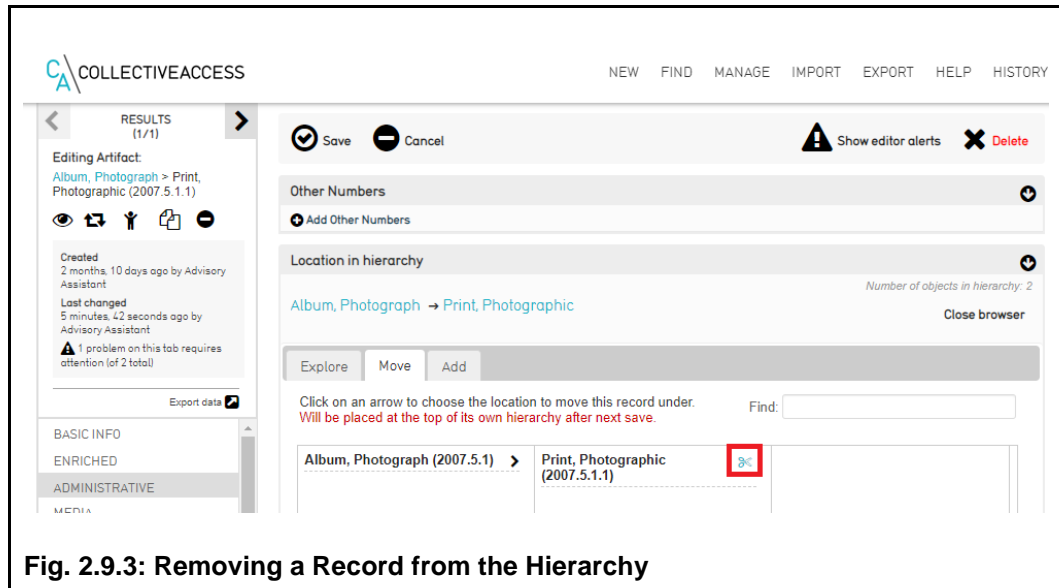
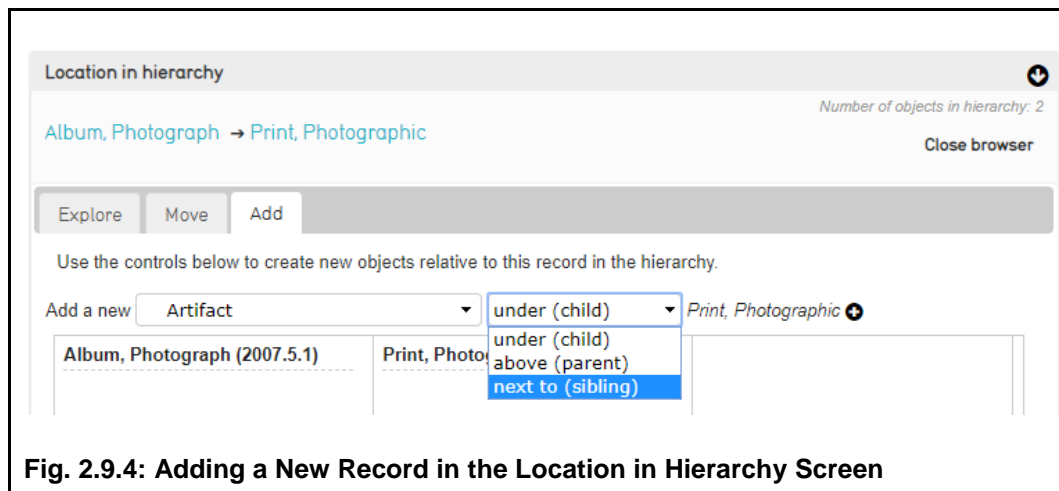


Fig. 2.9.2: Choose Location to Move Record Under

Repeat these steps to add additional records under the primary record. If you would like to remove a record from the hierarchy, click the scissors icon next to the record within the hierarchy and click save (see [Fig. 2.9.3](#)).



You can also add new records within the hierarchy using the Add tab listed at the top (see [Fig. 2.9.4](#)). Choose record type and position in the hierarchy from the drop-down menus.



A new record will be added to the hierarchy and appear so that you can add information.

Media

This page allows you to attach relevant media to the record. This includes artifact photos, videos and documents. Multiple media files may be attached. These files may be from anywhere on your computer and in almost any file type. (A [full list of supported file formats](#) is available on the CollectiveAccess documentation website under *Supported Media File Formats*.)

To attach a media file, click the “choose file” button and navigate to the location of the file on your computer, and then press “open”. A series of drop-down menus allow you to choose the view of the media (back or front), whether the file will be viewable on NovaMuse.ca and whether or not you would like the file to be the primary representation of the object. Choose ‘accessible to public’ if you wish to share the image on NovaMuse and choose ‘not accessible to the public’ if you choose to limit accessibility to CollectiveAccess ([Fig. 2.10](#)). If the item is on loan, choose ‘not accessible to public.’ If the museum deems that the material is sensitive, staff are advised to make an internal decision whether or not to choose ‘accessible to public.’ If you would like to upload more files, click the “add representation” button and repeat.

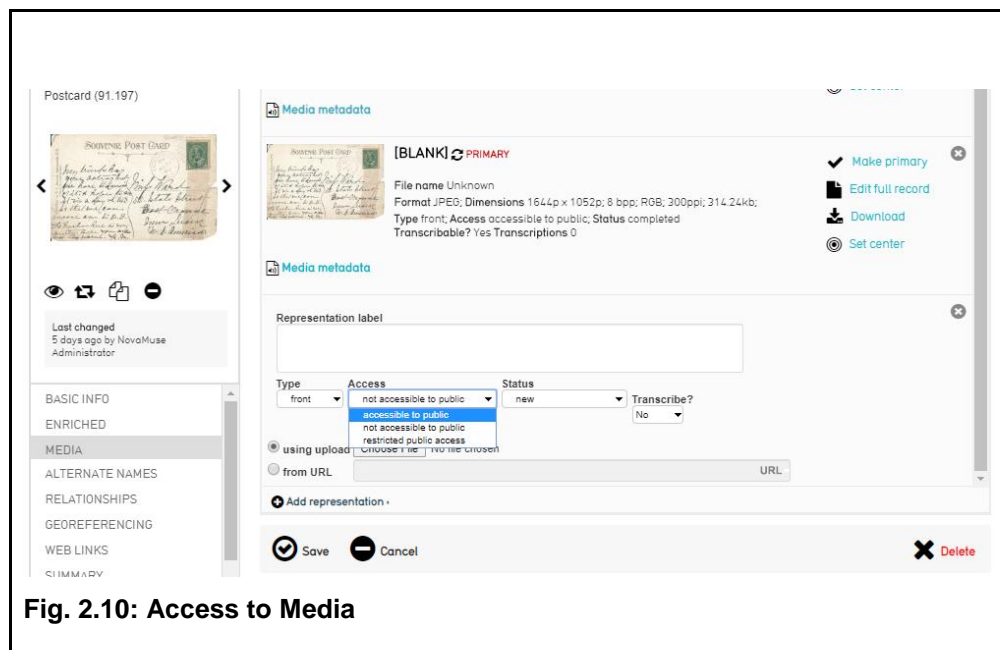
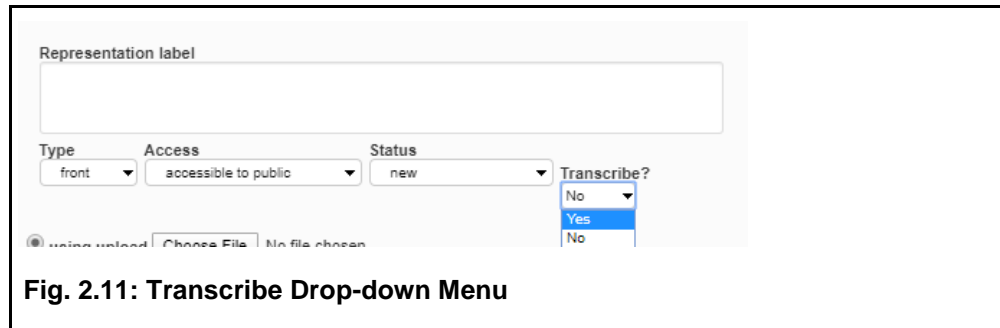


Fig. 2.10: Access to Media

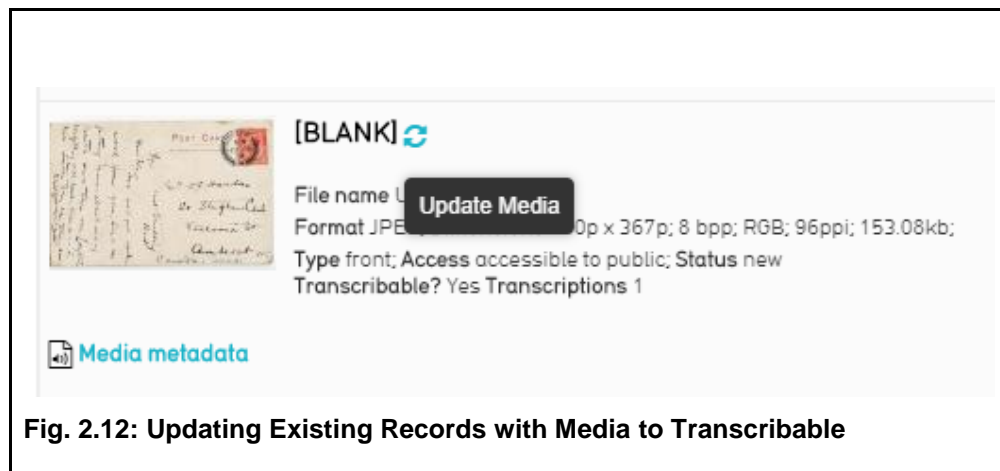
When you are done adding files, click the save button. Depending on internet speed and the number and size of files attached, the page may say “image in processing”. Once you see this message, you can leave the page and continue with other work.

Transcription Tool

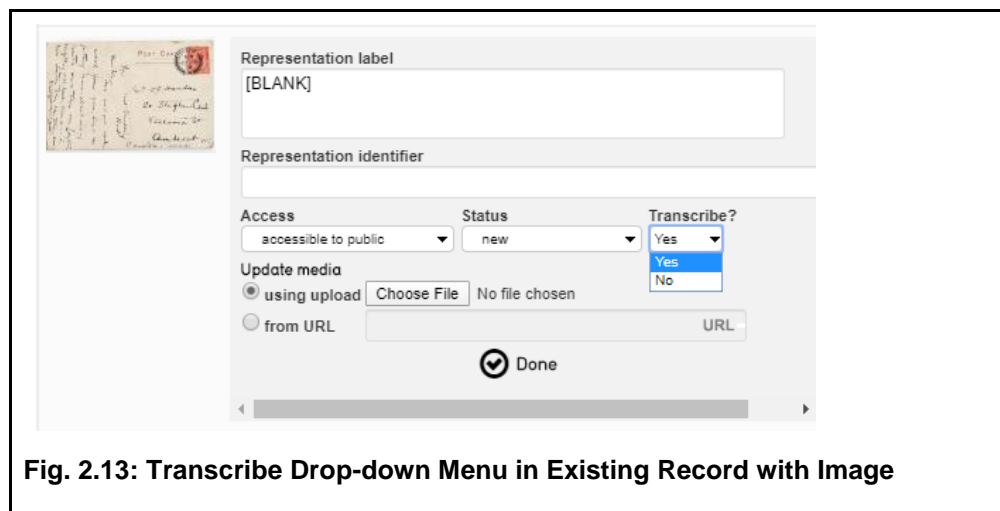
To allow the public to transcribe the document using the NovaMuse transcription tool, click on the “Transcribe?” dropdown menu and select “yes” ([Fig. 2.11](#)), then click “Done.” Repeat this process for multiple images (i.e. multi-page letter, etc.). You will be prompted by a message alerting you that your changes will be applied after you click save. This can be a way to track whether or not you've changed the setting for each image. Click “save” in the record itself to apply changes.



To update existing records with media so that the public can transcribe the document, go to the media tab and click on the circular arrow icon next to the image name (which by default is [BLANK]) ([Fig. 2.12](#)).



In the pop-up window, click on the "Transcribe?" dropdown menu and select "yes," then click "Done." ([Fig. 2.13](#))



Repeat this process for multiple images (i.e. multi-page letter, etc.). You will be prompted by a message alerting you that your changes will be applied after you click save. Click “save” in the record itself to apply changes.

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

After you have added media to the Object record, it will appear on the media page (Fig. 2.14) as well as in the Inspector window in the upper left of the page. Clicking on an image in either place will launch the Media Viewer, which allows you to pan, zoom, and cycle through images and download them at various sizes (Fig. 2.15) The media viewer can be closed by pressing the “x” button in the lower right-hand corner of the Viewer or by hitting the escape key.

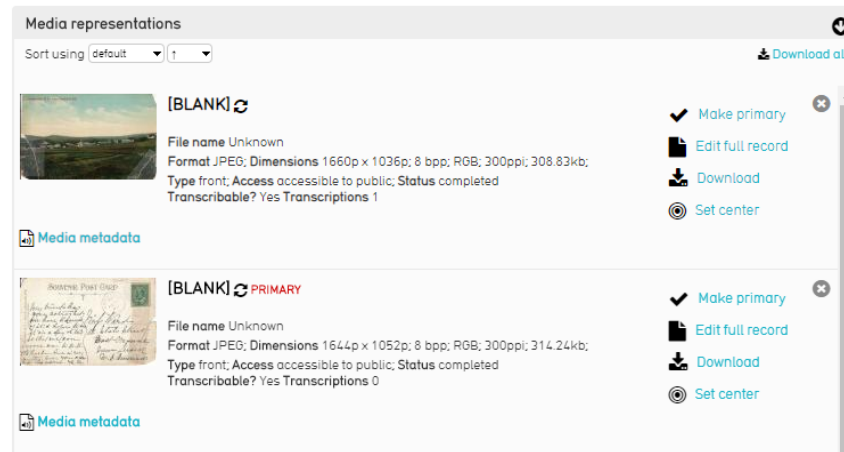


Fig. 2.14: The Media Page after Attaching Images



Fig. 2.15: The Media Viewer

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

A [YouTube tutorial](#) for CollectiveAccess users is available, which demonstrates how to update records to be transcribable. A [YouTube tutorial](#) demonstrating how to add media and georeferencing is also available.

Alternate Names

Allows you to record alternate names or local colloquialisms which describe the object, for example “Plug, Lobster” for “Peg, Lobster.” This makes it easier to find the objects you are searching for, especially on NovaMuse.ca.

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

Relationships

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

Entities, Collections, Historic Events, and Loans are created separately from this page, a process which will be discussed later in this document. The relevant worksheet of a related item can be viewed from the relationship page by clicking on the name of the related artifact in this field ([Fig. 2.16](#))

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



Fig. 2.16: Related Objects

Georeferencing

This page allows you to pinpoint a precise geographical location associated with an object ([Fig. 2.17](#)). This means you can record where a photograph was taken, the house where a particular flatiron was found or the town where a basket was produced.

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

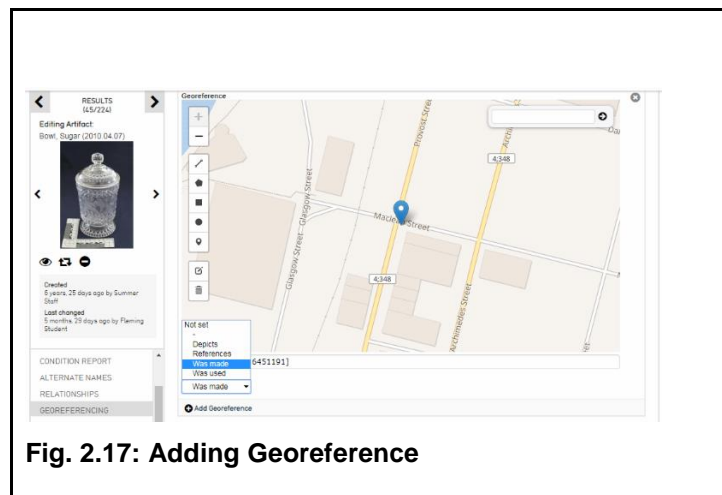


Fig. 2.17: Adding Georeference

A [YouTube tutorial](#) covering adding media and georeferencing is also available.

Web Links

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

Summary

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

Report types can be chosen from the “Display” drop-down menu in the upper right of the screen. A printable version of the report can be generated by clicking the white page icon to the right of the drop-down ([Fig. 2.18](#))

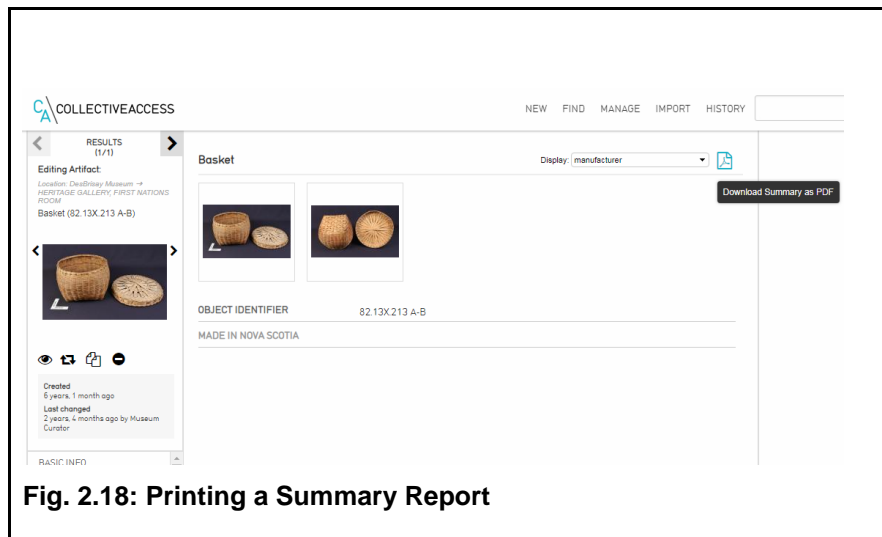


Fig. 2.18: Printing a Summary Report

Log

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

See [Appendix B](#) for an example of a satisfactory level record that adheres to professional standards and best practices.

c. Finding Objects

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

Basic Search

The basic search function finds objects by keyword ([Fig. 2.19](#)). It searches across all fields in the catalogue worksheet; this means that searching for “chair” returns not only items which are chairs, but which mention “chair” anywhere in the record. To search for artifacts within a specific range of dates, use keywords:

- *-search all records
- **Modified: after YYYY-** search for all records modified after listed year
- **Created: after YYYY-** search for all records created after listed year
- **Modified: username: after YYYY-** search for all records modified by a specific user after listed year
- **Created: username: after YYYY-** search for all records modified by a specific user after listed year

Note: you can also search for specific years by removing the after or specific months by adding it into the field

A [YouTube tutorial](#) covering these key word searches to run progress reports is also available.

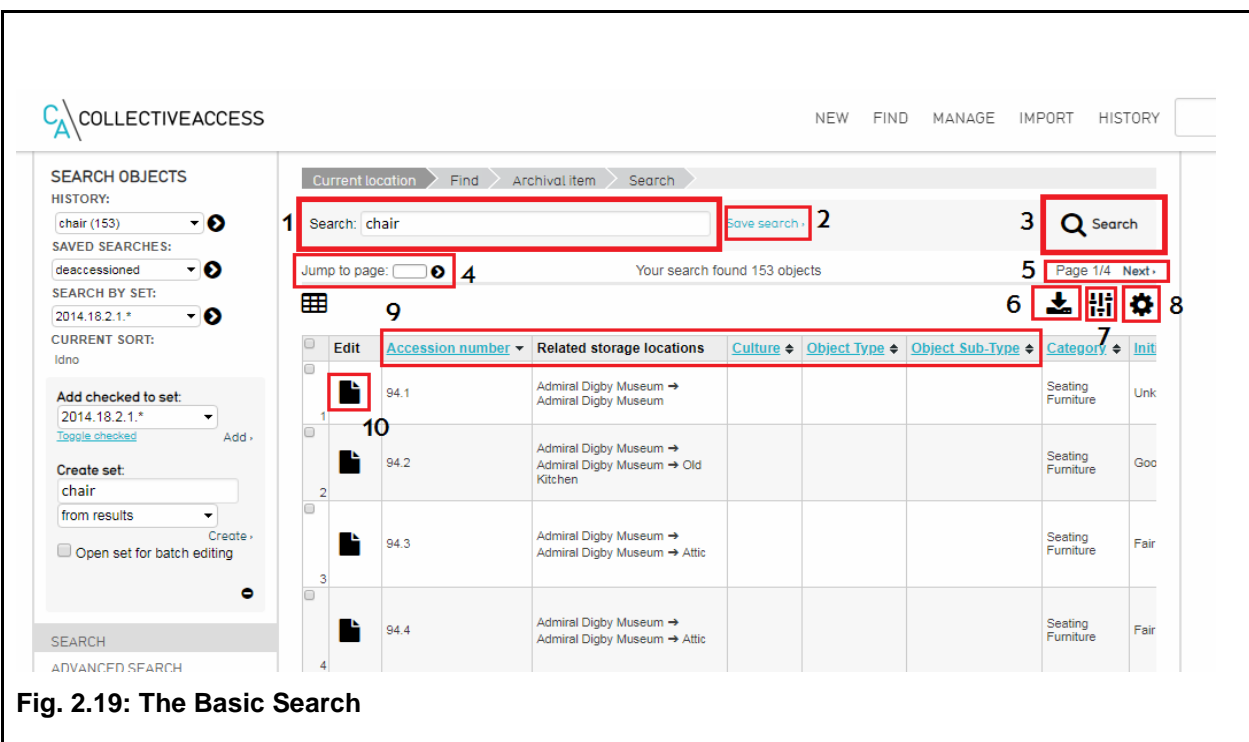


Fig. 2.19: The Basic Search

1. The Search Field

Keywords or other text to look for are entered here.

2. Save Search button

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

3. Search button

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

4. “Jump to Page” Navigation

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

5. Page Browsing

Allows you to move from page to page of search results, or jump to a specific page.

6. Export Tools

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

7. Refine Results

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

8. Display Options

Allows you to change how search results are displayed from a number of custom or pre-configured display options. Display types are the same as for the summary page in catalogue worksheets. Using the right display will help you answer questions about sources of items, storage locations, culture and more. Displays are discussed at greater length in “Displays,” below.

9. Quick Sort

Clicking on each heading allows you to quickly sort the search results by object name, accession number, category and more.

10. Edit Record button

Clicking this button opens the selected object record.

11.) Search Objects menu

Use this to select specific sets to search, use saved searches to specify your search terms, and search using your history

12.) Set Tools

Use these to create a new set from your selected search results, or to add items to a created set. Add checked to set allows users to add any items selected via checkbox to the chosen set picked from a dropdown list. Create new set allows users to build a new set after choosing some items to start it and selecting a name. This has the same effect as building one through Manage, Sets (see Fig 8.9)

Advanced Search

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

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

A [YouTube tutorial](#) on advanced searches is also available.

Browsing

By using the Find > Objects > Browse sequence, the user can explore a number of different ‘filter by’ options ([Fig. 2.20](#)) Browsing allows you to find similar or interesting objects without having a specific set of search criteria in mind. You can browse objects by title, entity, storage location, type, access status, status, acquisition method, timeframe (centuries, decades, years), collection, type, condition, treatment proposals, manufacturer, and whether or not an item has associated media ([Fig. 2.21](#)). Browsing by entity, for example, could allow you to see all the objects associated with a particular source; browsing by a particular storage room would let you see all of your objects which are located there and in contained units. The “Storage Location Specified?” option allows you to see artifact records with or without storage locations ([Fig. 2.22](#)). Browsing by Problems allows you to assess errors in your database.

A [YouTube tutorial](#) on error assessment is also available.

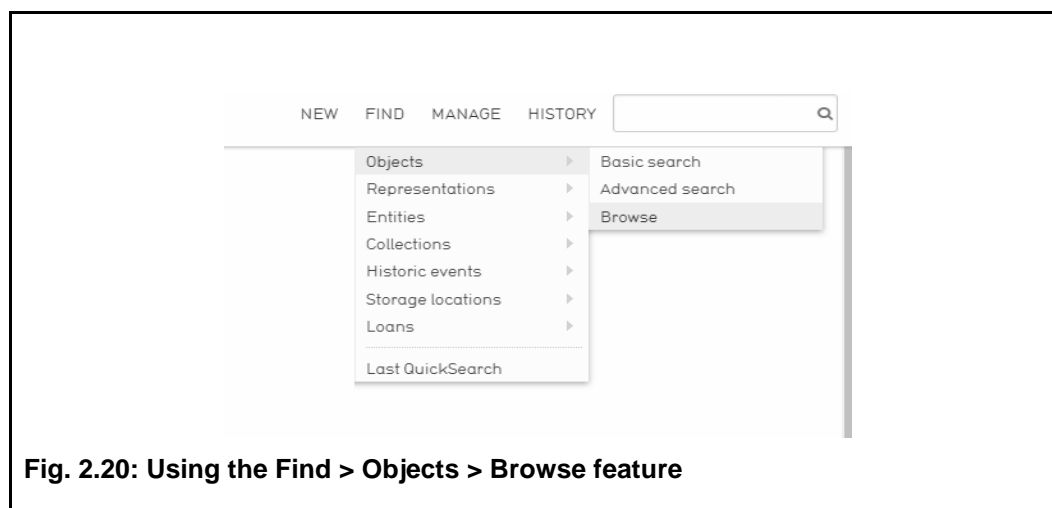


Fig. 2.20: Using the Find > Objects > Browse feature

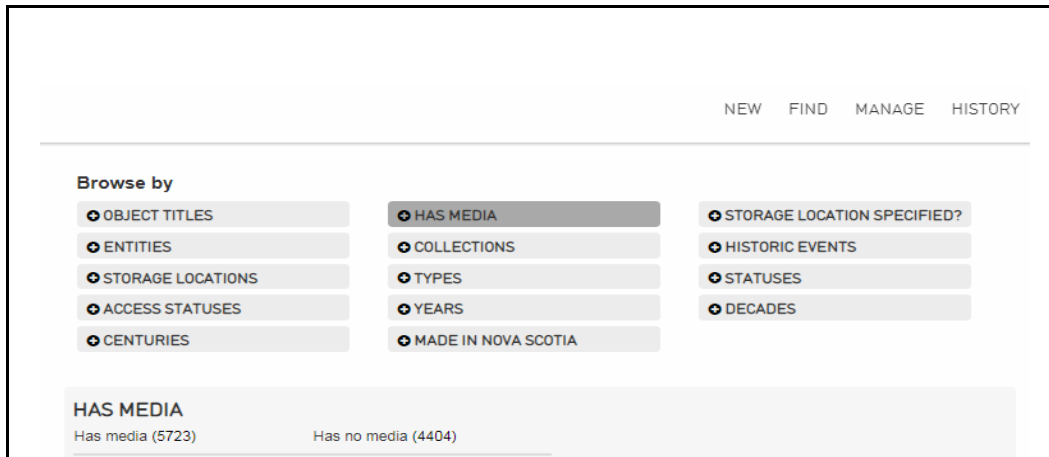


Fig. 2.21: Using the ‘Has Media’ filter option to discover records with and without images

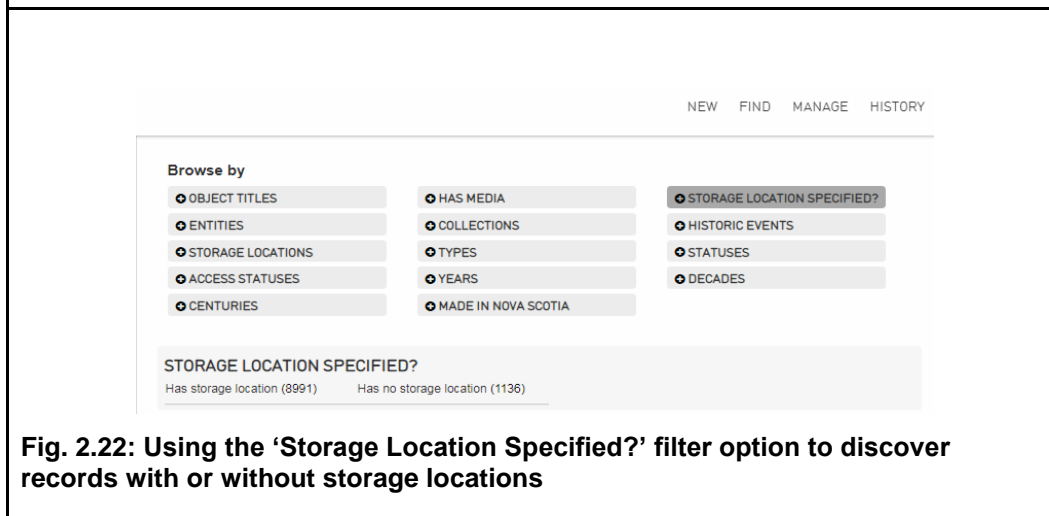


Fig. 2.22: Using the ‘Storage Location Specified?’ filter option to discover records with or without storage locations

d. Editing Objects

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

e. Editor Alerts

The problems that require your attention are listed in the Inspector Window ([Fig. 2.23](#))

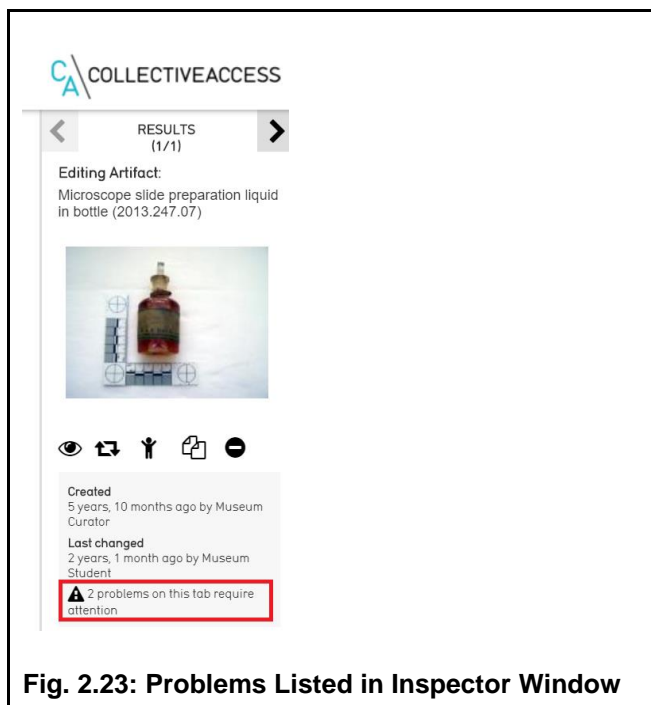


Fig. 2.23: Problems Listed in Inspector Window

To view real-time validations for these problems, click “Show editor alerts” in a record ([Fig. 2.24.1](#)).

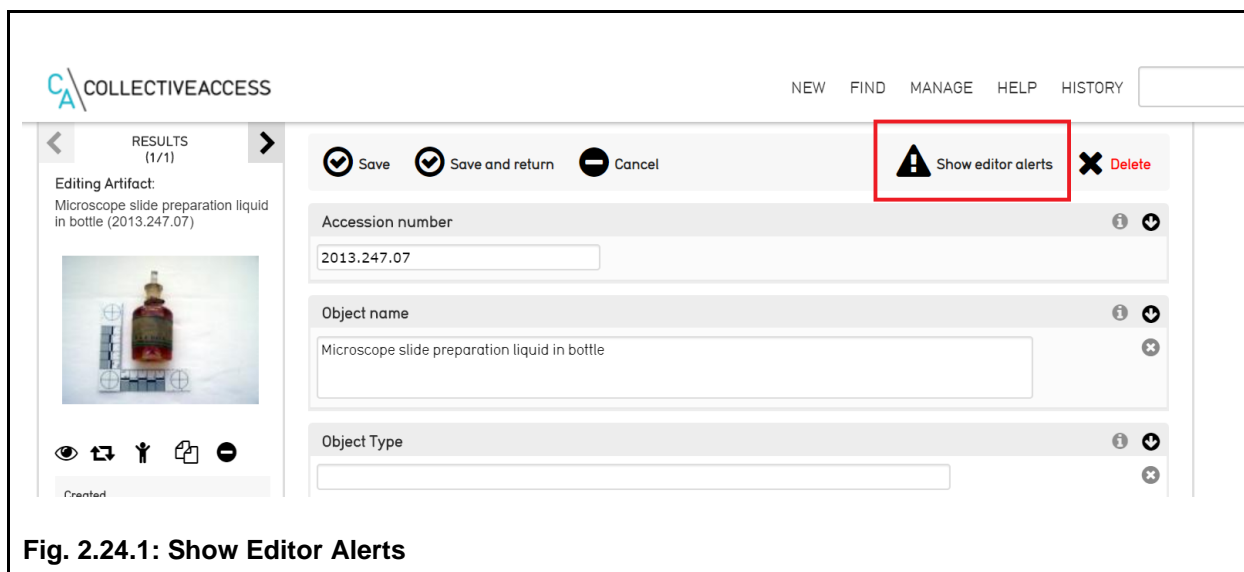


Fig. 2.24.1: Show Editor Alerts

The database will guide you through the different problems by highlighting fields that require attention ([Fig. 2.24.2](#)). Ideally, you should make the changes required before proceeding.

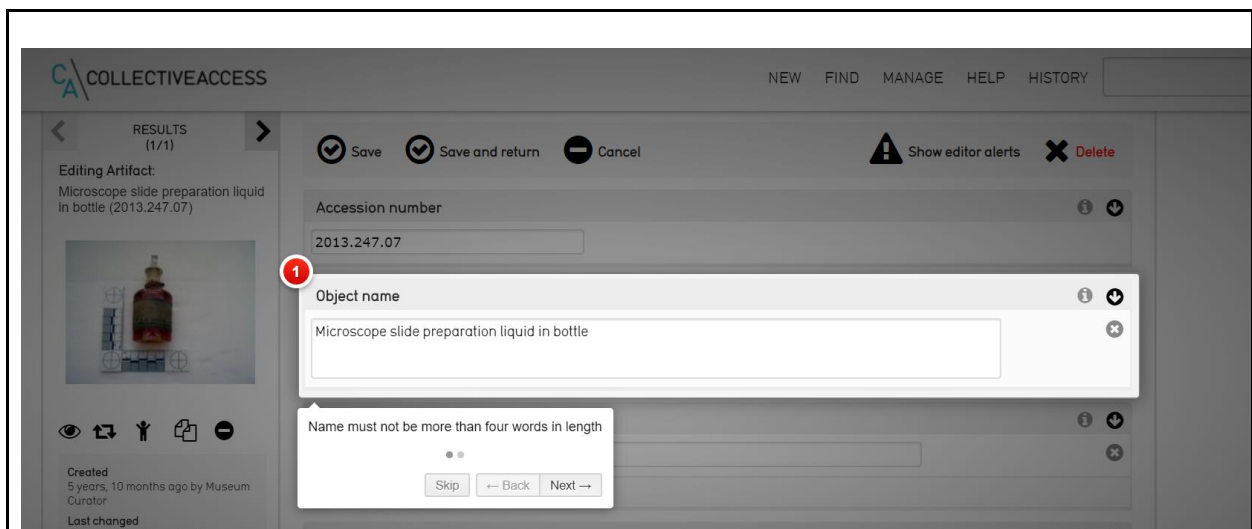


Fig. 2.24.2: Editor Alerts Highlighting Fields that Require Attention

Use the navigational buttons at the bottom to work through the flagged problems. If there are additional problems on other Tabs, these will be listed in the Inspector Window. Navigate to the each tab referenced in this list and click 'Show Editor Alerts' to repeat this process. Watch the [YouTube tutorial](#) for a demonstration.

3. Entities

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

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

The entity worksheet is similar in appearance and function to the catalogue worksheet, discussed at length above (see [2.a](#), "The Catalogue Worksheet"). [A YouTube tutorial](#) covering the basics of adding a new entity is also available.

a. Entering Data

Screens

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

Basic Info

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

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

Alternate Names

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

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

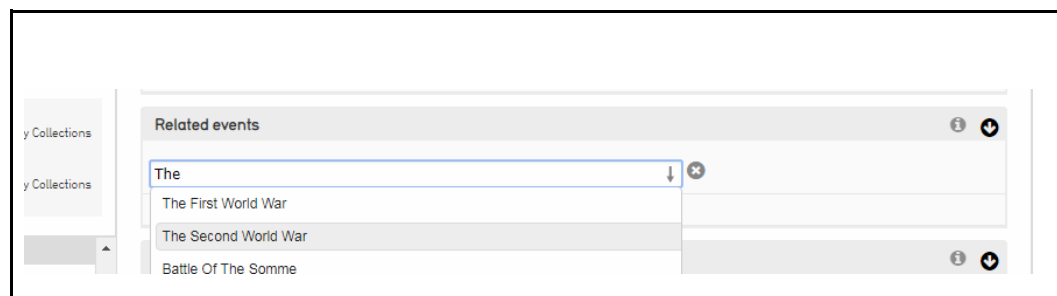
Contact Info

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

Relationships

Records the relationships between the entity and objects, other entities, historical events and collections. This page would, for example, allow you to associate a particular object with its original owner, manufacturer, and with a historical event such as the Second World War. Linked records can be viewed by clicking on the record’s name.

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



The screenshot shows a web interface for managing relationships. On the left, there are two vertical panels labeled 'y Collections'. The main area is titled 'Related events' and contains a search bar with the text 'The'. Below the search bar, a dropdown menu displays three suggestions: 'The First World War', 'The Second World War', and 'Battle Of The Somme'. To the right of the suggestions, there are icons for information and a downward arrow. At the bottom right of the suggestions list, there are icons for information and a downward arrow.

Fig. 3.1: Adding Relationships

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

Links

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

Summary

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

Log

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

Adding a New Entry

New entities can be added by selecting New > Entity in the Global Navigation and then choosing the appropriate entity type, either individual, organization or family ([Fig 3.2](#)). You do not identify the entity relationship (ie Source, Owner etc.) at this level. When entering individual entities, do not enter multiple names (i.e. Bob & Barb Smith). Instead, duplicate the field and add each individual separately.

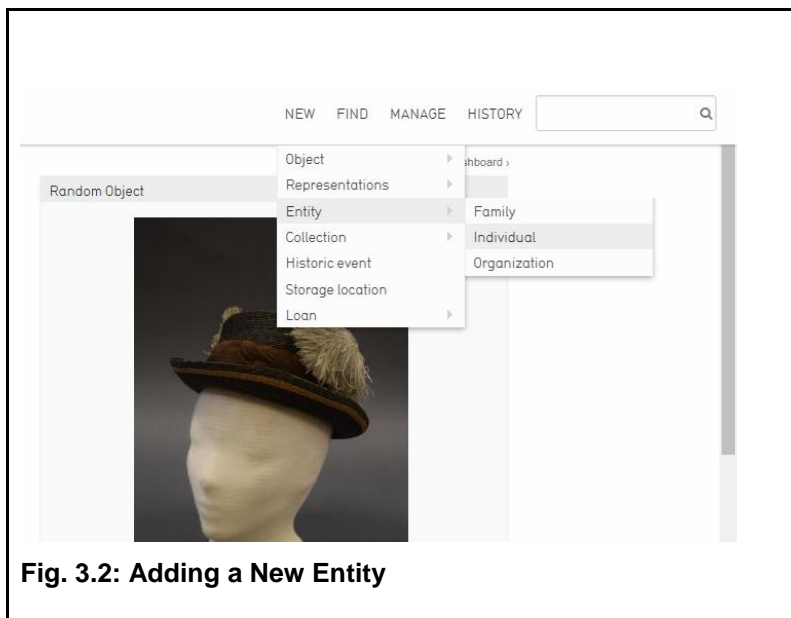


Fig. 3.2: Adding a New Entity

Editing an Entry

Select Find > Entity in the Global Navigation and then choose the appropriate search option: Basic Search, Advance Search, or browse to locate the entity record desired. Make the necessary corrections to the chosen entity and click save.

b. Finding Entities

Much as with Objects, Entities can be found using Basic Search, Advanced Search, and Browsing (See “[2.c, Finding Objects,](#)” above). Entities can be browsed by type (family, organization or individual), status and access status. The Entity search menu can be accessed by selecting “Find > Entities” on the Global Navigation bar ([Fig. 3.3](#)).

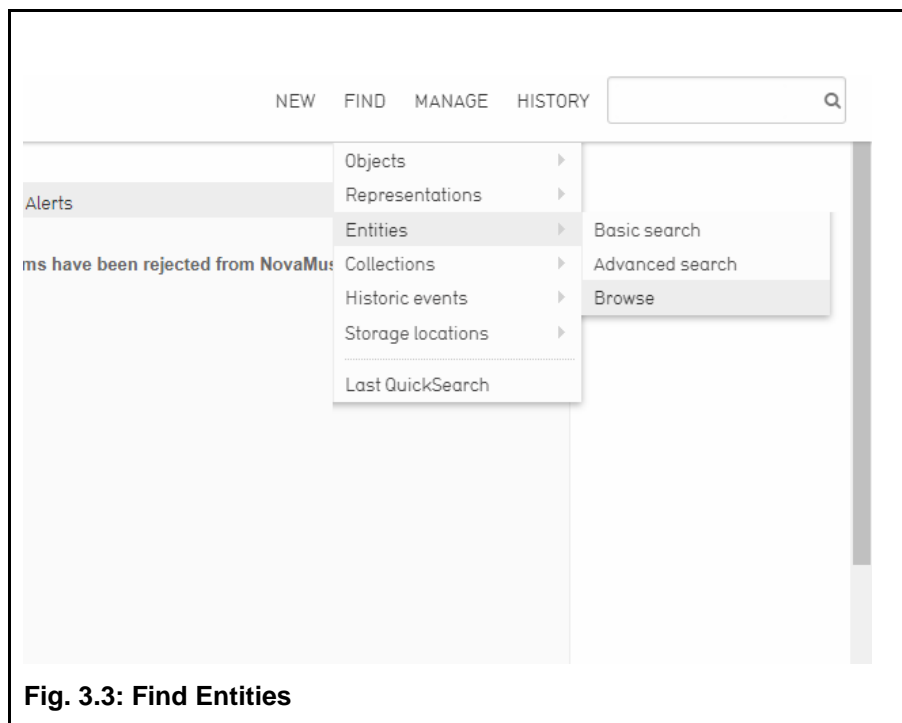


Fig. 3.3: Find Entities

Entity records can also be accessed from related Object, Event and Collection records by clicking on the Source's name after saving ([Fig. 3.4](#)).

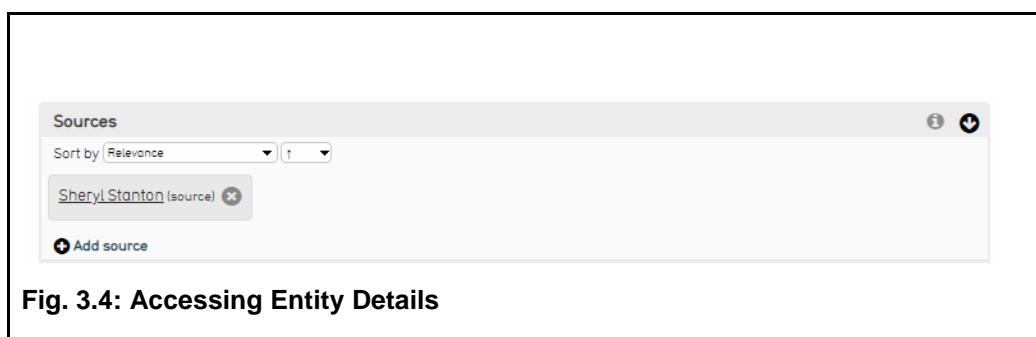


Fig. 3.4: Accessing Entity Details

c. Editing Entities

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

4. Collections

Collections are to be entered if they arrived as a collection or are grouped that way for museum administrative purposes (i.e. a working or teaching collection). The system allows for two different types of collections, archival and administrative.

To create a new collection, select “New > Collection” from the Global Navigation bar. There are two options: Administrative Collection and Archival Collection. This opens up a blank Collection Worksheet (for more on worksheets, see “[2.a](#), The Catalogue Worksheet”). The only things needed to create a new collection is a name and a collection identifier. The collection identifier must be unique.

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

5. Historic Events

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

6. Storage Locations

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

a. Storage Location Search and Hierarchy Page

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

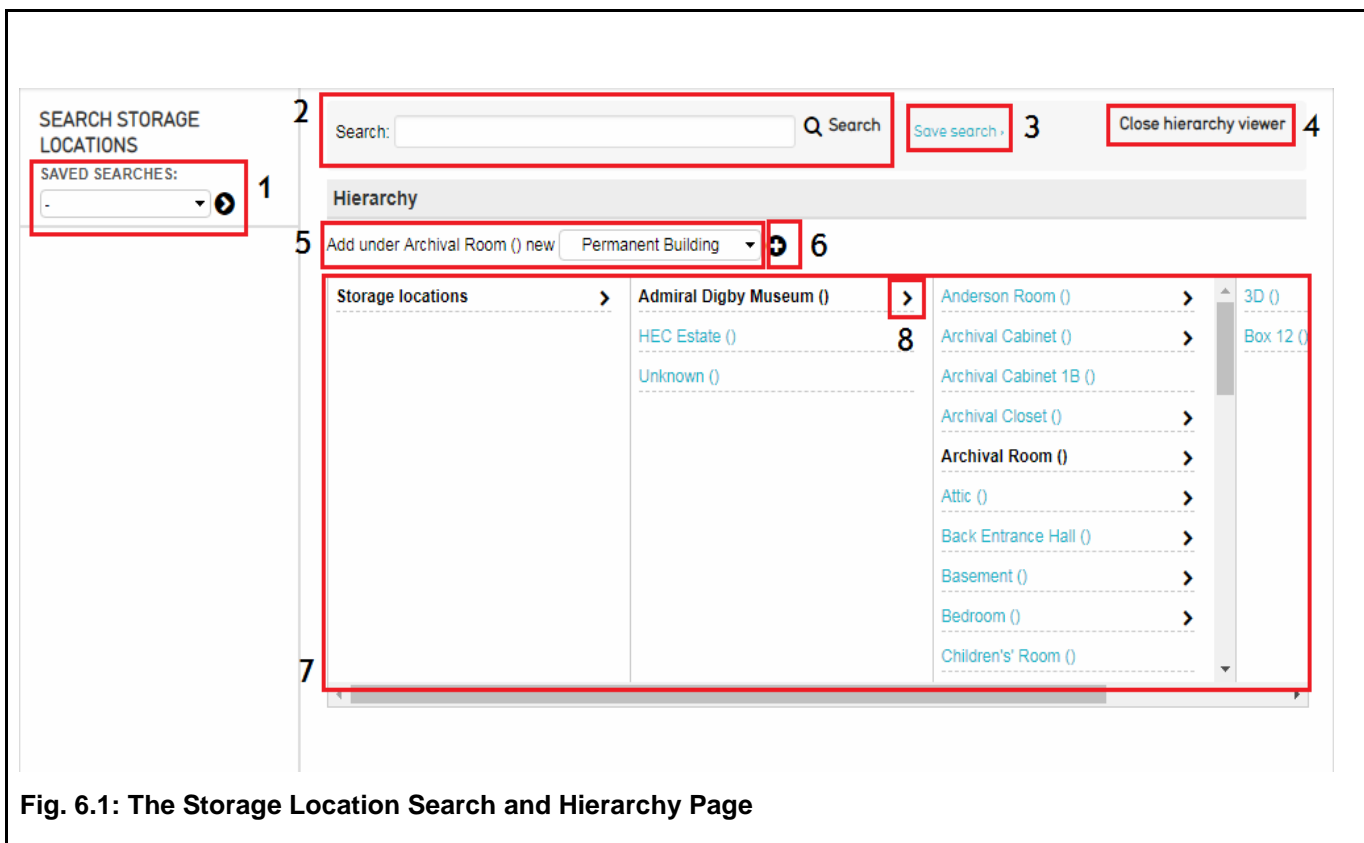


Fig. 6.1: The Storage Location Search and Hierarchy Page

1. Search Options

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

2. Search Bar

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

3. Save Search Button

Saves the results of a search. Saved searches can be viewed through the Local Navigation menu, through the "Manage" menu or through a dashboard widget.

4. Close/Open Hierarchy Viewer

Closes or opens the hierarchy viewer.

5. Add Storage Location Drop-Down Menu

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

6. Add Storage Location Button

Click to add a new record of the type selected in the drop-down menu in the specified location.

7. Hierarchy Viewer

Shows all storage locations as part of a nested hierarchy. Bolded locations are the selected locations. Click on a location to show or add nested locations.

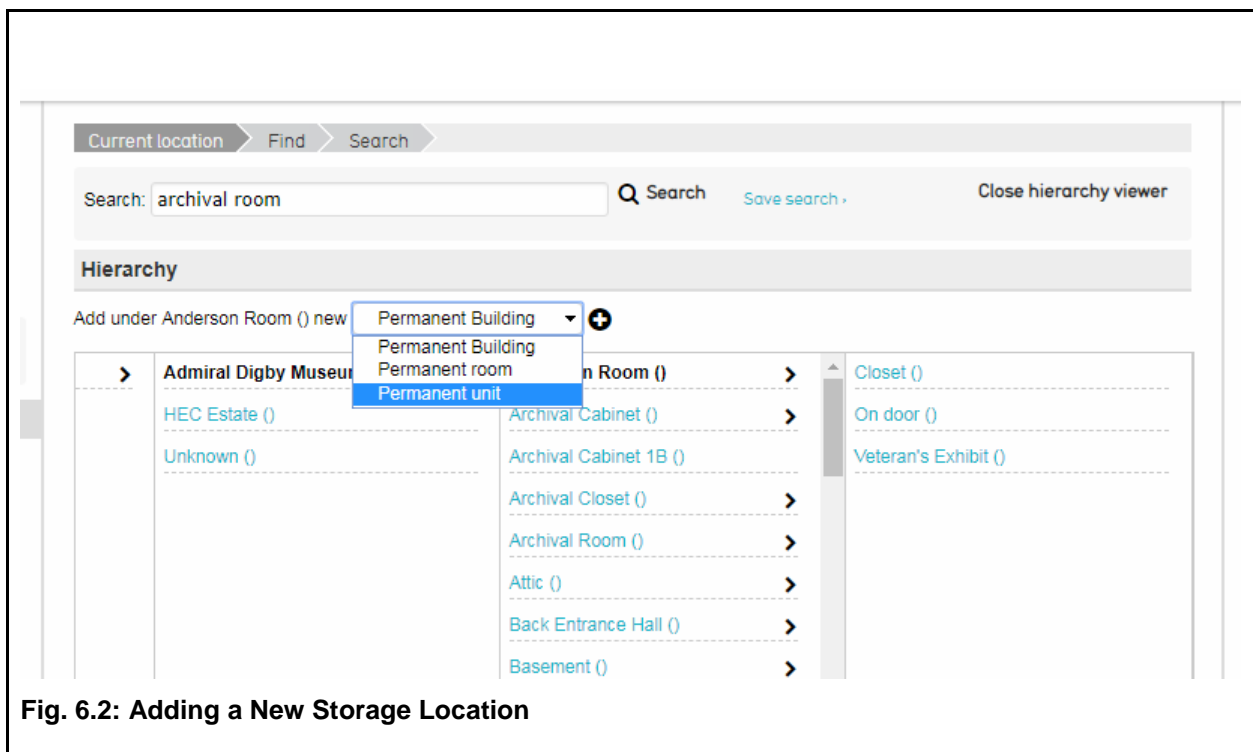
8. Edit Storage Location

Click on the grey arrow to view and edit the location's worksheet.

Search results appear below the hierarchy viewer.

b. Adding a New Storage Location

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



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

Then select the type of location you are adding—either a building, room, or unit—from the drop-down menu, and click on the small plus icon to the right of the menu to open the storage

location worksheet. In the example above ([Fig 6.2](#)), a new unit is being added to the room “Anderson Room.”

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

Location Screen

Shows the location’s place in the storage hierarchy and the hierarchy viewer (choose “Show Hierarchy”). The hierarchy viewer in this view can be used to add more locations and move the current location to a different location in the hierarchy by using the “move” and “add” tabs.

Contents Screen

List the objects associated with the location. Does not list objects associated with units within the location; in other words, if you are viewing the contents of the Anderson Room, it will not display items located on named units and sub-units in the Anderson Room.

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

New objects can also be associated with the location from this screen in the same way as the objects and entity “relationships” screen (see [Fig. 6.3](#)).

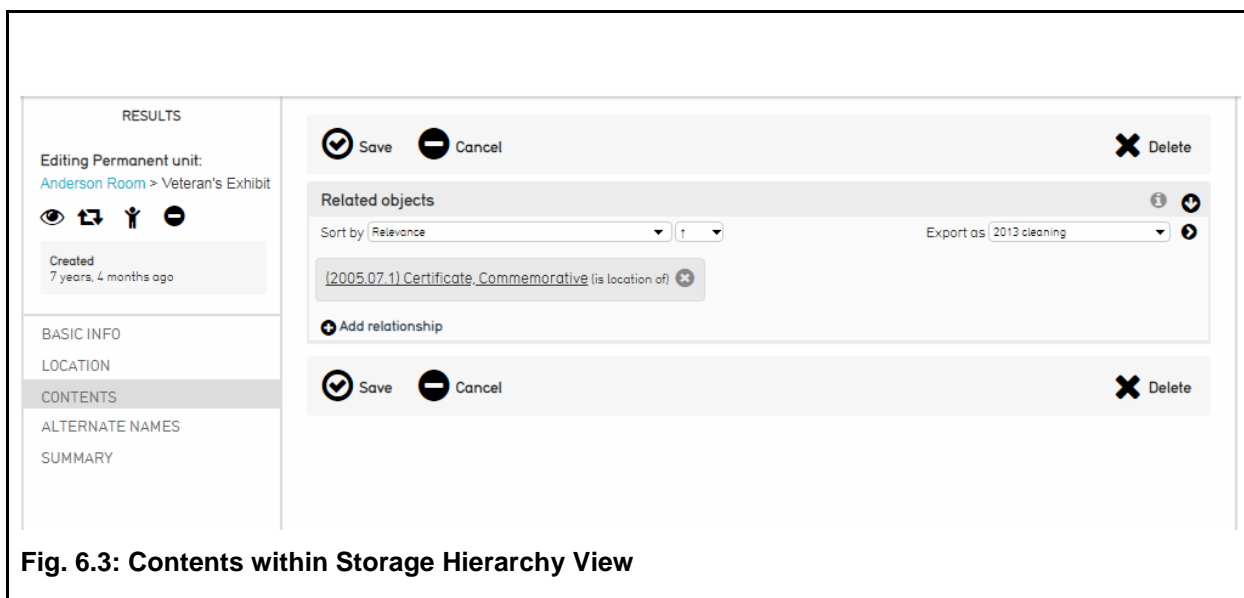


Fig. 6.3: Contents within Storage Hierarchy View

A [YouTube tutorial](#) on storage locations is also available.

7. Loans

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

8. Managing

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

a. Preferences

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

b. Saved Searches

View and deleted saved searches. Accessible from Manage > My search tools. For more on saved searches, see [“2.c, Finding Objects,”](#) above.

c. Watched Items

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

d. Displays

CollectiveAccess allows a large amount of control over how information is displayed in search results and in the summary page of item records. This means, for example, that you can create a display that will return not only basic information about search results, but more details such as object source, exact location, associated cultures and more. These can be used to generate detailed reports and easily answer complicated questions about your collection, and aid in inventories and exhibit planning (see [Fig. 8.1](#)).




Edit	Object titles	Description	Object media representation...	Object Type	Related storage locations
1	Wreath, Hairwork	Heart shaped wreath within a shadow box. The wreath is made from intricate hair flowers that have been woven and stitched. Within the center of the heart shape is a small clump of flowers that are adorned with a bow.			Colchester Historeum → 3rd Floor, Artifact Storage Room → Section 25 → Shelf C
2	Wreath, Hairwork	Wreath in a horseshoe shape that is mounted into a fabric lined box. The wreath is made from intricately woven and stitched hair. The hair is formed into floral shapes. There is a woollen material that twists around the wreaths substructure.			Colchester Historeum → 3rd Floor, Artifact Storage Room → Section 26 → Shelf D
	Wreath, Hairwork	Black shadow box frame that is lined with fabric. Mounted inside the box is a wreath that is made with hair. These are hand			Colchester Historeum → 3rd Floor, Artifact Storage Room →

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

Using Displays

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

For Searches:

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

Search: chair Save search Search

Jump to page: Page 1/4 Next

Sort: Idno ↑ #/page: 48

Layout: list Display: Location Re

Edit	Object titles	Accession number
1	Chair	94.1
2	Chair	94.2
3	Chair, Slat-Back	94.3
4	Chair, Slat-Back	94.4
5	Chair	199

Admiral Digby Museum → Admiral Digby Museum

Admiral Digby Museum → Admiral Digby Museum

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

For Summaries:

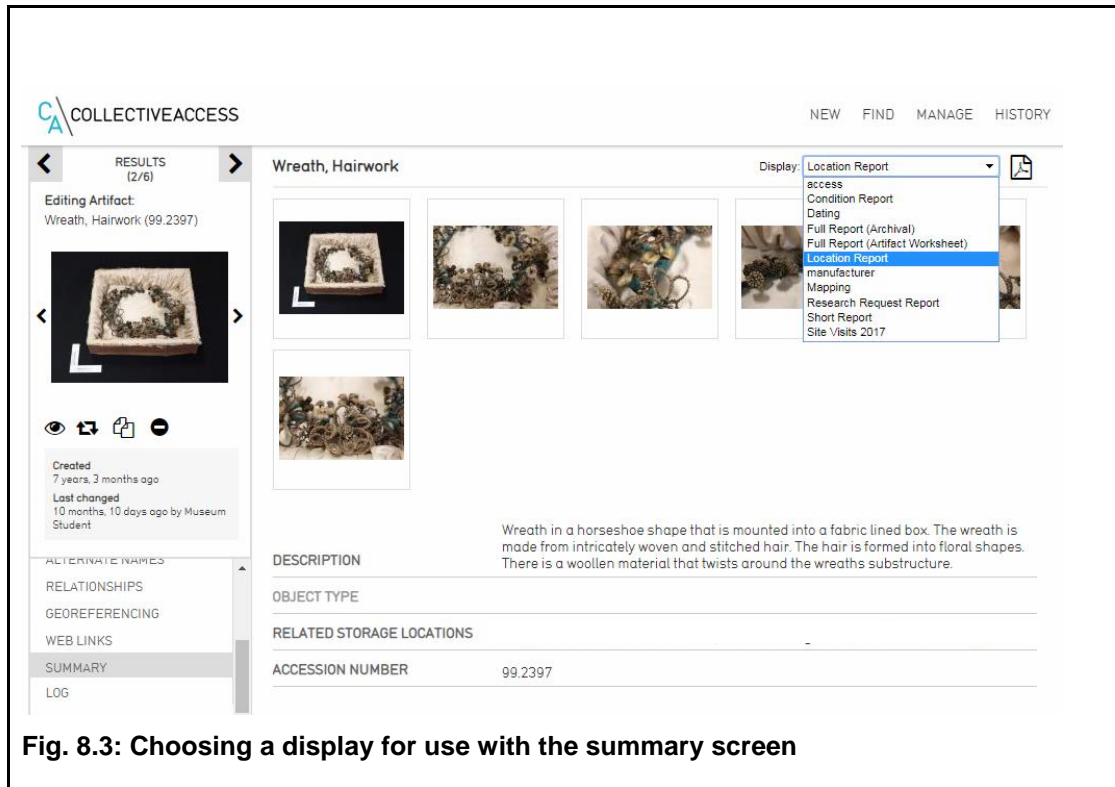


Fig. 8.3: Choosing a display for use with the summary screen

To select a display to use on a record's summary screen, use the drop-down box in the top right hand side of page. After selecting, the page will update automatically (see [Fig. 8.3](#), above).

Pre-Configured Displays

The following displays come pre-configured with the system:

Full Report (Artifact and Archival)

Best used on the summary page of the object in question. Shows all of the fields used in the catalogue worksheet for a full, detailed report that can be printed off and stored with your records, or kept off-site as a backup.

Short Report

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

Location Report

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

Condition Report

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

Research Report

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

Entity Report

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

Adding a New Display

New displays can be created by selecting Manage > My displays from the Global Navigation bar and clicking the “New display list” button. A [YouTube tutorial](#) on this process is also available.

The screenshot displays the 'New Display Worksheet' in the CollectiveAccess system. The interface is divided into a sidebar and a main content area. The sidebar on the left contains a 'BACK TO LIST (?/11)' button and a 'Viewing display list:' section showing details for a 'Condition Report (Condition Report)'. The main content area has a top navigation bar with 'NEW', 'FIND', 'MANAGE', 'IMPORT', and 'HISTORY'. Below this is a breadcrumb trail: 'Current location > Manage > Edit display > Basic info'. The main form is titled 'Display list name' (labeled 1) and contains a text input field with 'Condition Report'. Below this is a 'Display code' field (labeled 2) also containing 'Condition Report'. There are buttons for 'Save', 'Cancel', and 'Delete'. A dropdown menu for 'Is system display?' is set to 'No'. The sidebar also shows 'Number of placements: 0', 'Type of content: objects', and 'Owner: CollectiveAccess Administrator'.

Fig. 8.4: The New Display Worksheet

1. Preferred Names

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

2. Display Code

A unique identifier for the display. Use whatever identifier works best for this display.

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

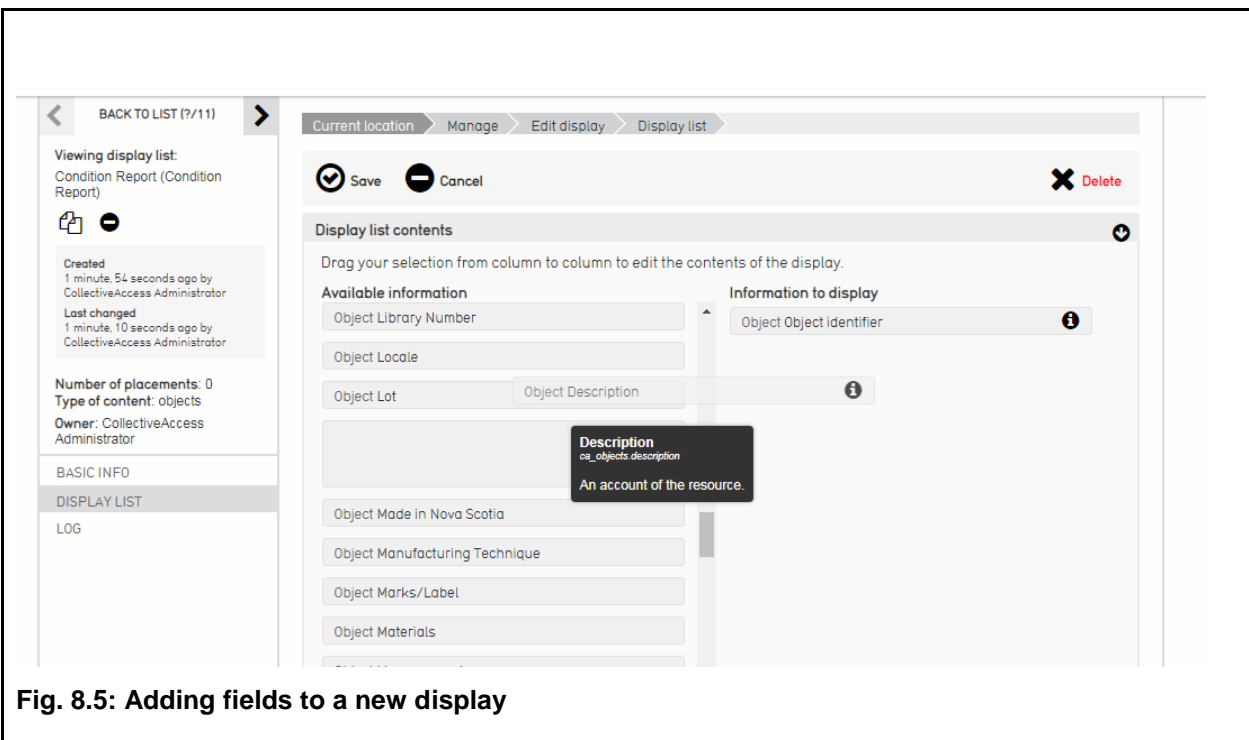


Fig. 8.5: Adding fields to a new display

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

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

e. Search Forms

Like displays, advanced search forms can be created and configured by the user. This can be used to create custom searches that only look for the information that you need. To create a new search form, select Manage > My search tools from the Global Navigation bar, and then

click on the drop-down menu next to “New search form for” and choose the appropriate option. You can create forms for collections, entities, historic events, loans, object representations, objects, storage locations (see [Fig. 8.6.1](#), below).

The screenshot shows the 'Viewing search form' page in the CollectiveAccess application. The sidebar on the left contains navigation links: 'BACK TO LIST (?/?)', 'Viewing search form: Entities Search Form (entities_search_form)', 'Created 16 seconds ago by CollectiveAccess Administrator', 'Last changed Just now by CollectiveAccess Administrator', 'Number of placements: 1', 'Searches for: entities', 'Owner: CollectiveAccess Administrator', 'BASIC INFO', and 'LOG'. The main form area has a top bar with 'Save', 'Cancel', and 'Delete' buttons. Below this, the form fields are: 'Form name' (labeled 1) with the value 'Entities Search Form', 'Form code' (labeled 2) with the value 'entities_search_form', 'Locale' (English), 'Add form name', 'Is system form' (No), 'Group access', 'Add group access', 'Search form contents', and 'Available search items' (Entity Address) and 'Items to search' (Entity Entity Identifier).

Fig 8.6.1: The Advanced Search Form Worksheet

1. Form Name

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

2. Form Code

A unique ID for the search form.

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

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

Once you are happy with your fields, click the save button. To test your search form, navigate to the appropriate find page and select your form from the drop-down ([Fig. 8.6.2](#))

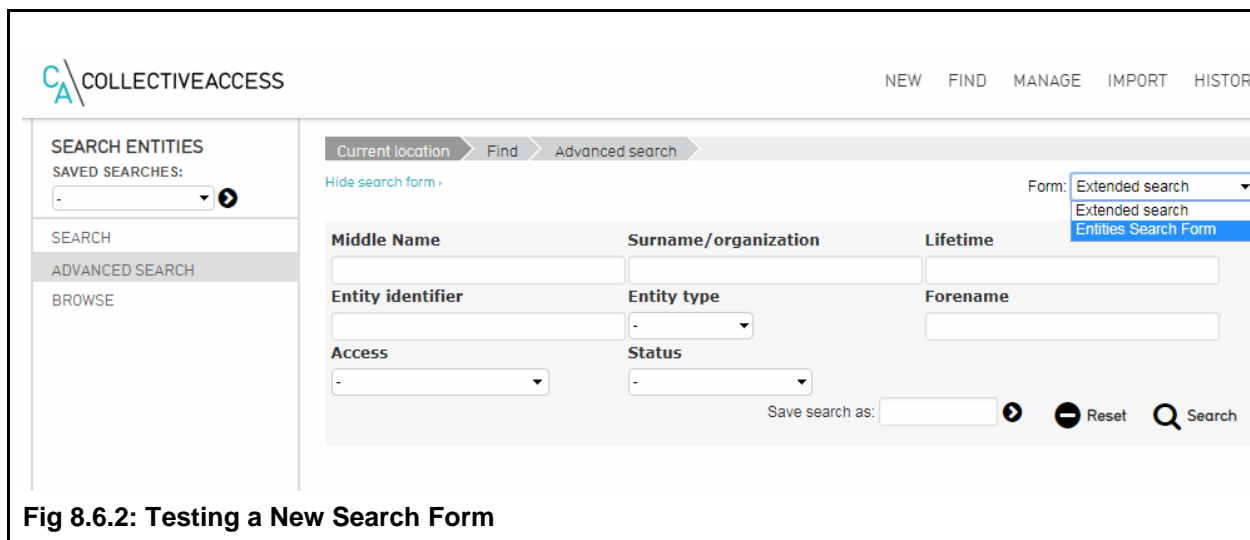


Fig 8.6.2: Testing a New Search Form

f. Sets

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

A new set can be created by selecting Manage > My sets, and then selecting the type of set you would like to create, either a public presentation or a user set, and the type of records the set will contain—either collections, entities, historic events, list items, loans, object representations, objects. To begin creating the set, click the small plus icon to the far right of the menu options ([Fig. 8.7](#)). The next screen will prompt you to fill in *The Set Worksheet* (See [Fig. 8.8](#), below).

A [YouTube tutorial](#) on creating is using sets is also available.

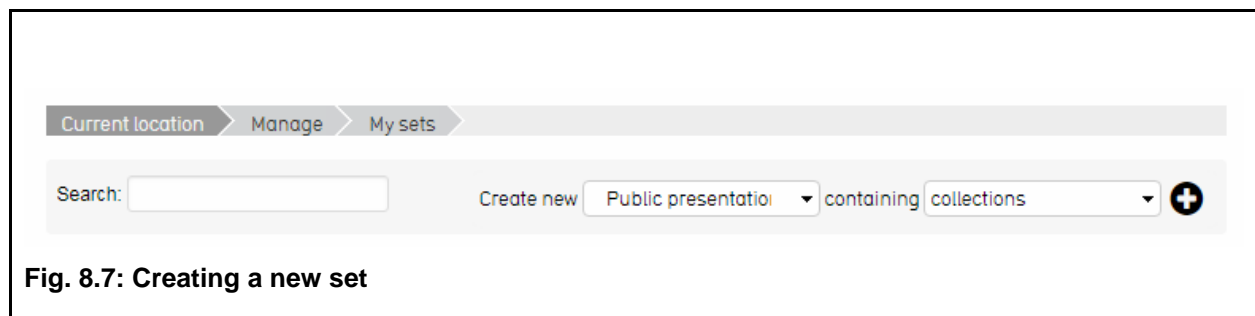


Fig. 8.7: Creating a new set

The screenshot shows a web form titled "The Set Worksheet" with a "Save" button and a "Cancel" button. The form is divided into three main sections, each with a red box highlighting the input area and a number to its right:

- Section 1:** "Set title" with the input field containing "New Exhibit Plan". Below it is a "Locale" dropdown set to "English" and an "Add title" button.
- Section 2:** "Set code" with the input field containing "New Exhibit". Below it is a "Locale" dropdown set to "English" and an "Add code" button.
- Section 3:** "Introduction" with the input field containing "Planning for the Summer 2019". Below it is a "Locale" dropdown set to "English" and an "Add Introduction" button.

Fig 8.8: The Set Worksheet

1. Preferred Name

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

2. Set Code guidance

A unique identifier for the set. Use whatever best identifies this set.

3. Introduction

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

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

After you have entered basic information about your set and saved, you can click on the "items" page to begin adding to your set ([Fig. 8.9](#)).

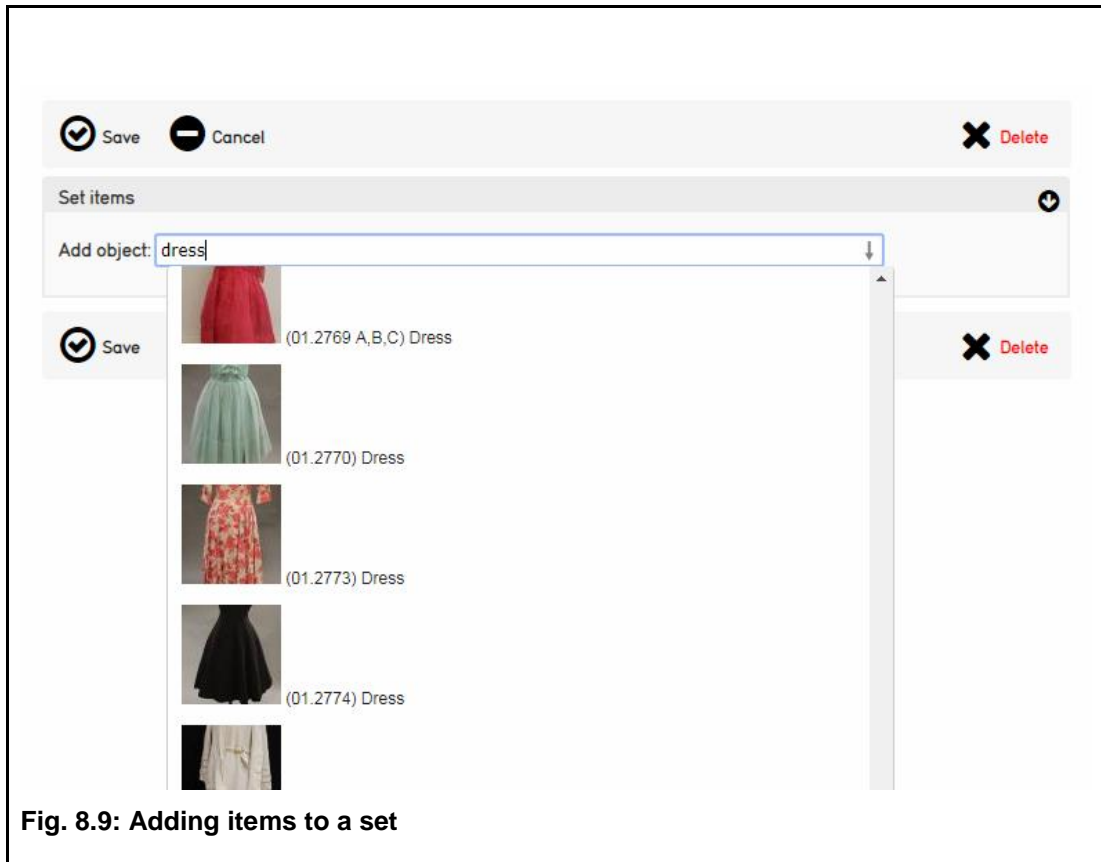


Fig. 8.9: Adding items to a set

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

Sets can be created and objects added to sets from the basic search menu as well as the set worksheet (see Fig 2.19). Once a set is created, its contents can be quickly displayed on the find page from a drop-down menu in Search Options.

g. Access Controls

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

h. Logs

The logs page allows you to see who has been logging in and out of the database for a selected date range, the type of changes that have been completed (choose “adds,” “edits,” or “deletes”

from the dropdown menu), and by which user. Use different options listed in the Change Log to run reports on user activity. The [YouTube tutorial](#) provides step-by-step instructions.

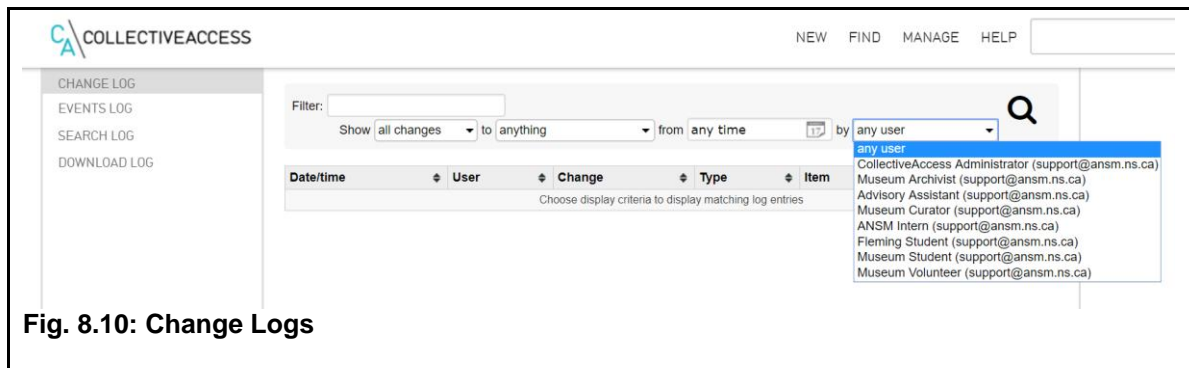


Fig. 8.10: Change Logs

i. Statistics

Navigate to Manage > Statistics to track changes in the database for total records, including: access and record type, created and modified, as well as, media and login information. Totals for “accessible to public” and “not accessible to public” for records and object representations (images) listed here. See results for last day, week, 30 days, 90 days, 6 months, and the last year. Watch the [YouTube tutorial](#) for a preview.

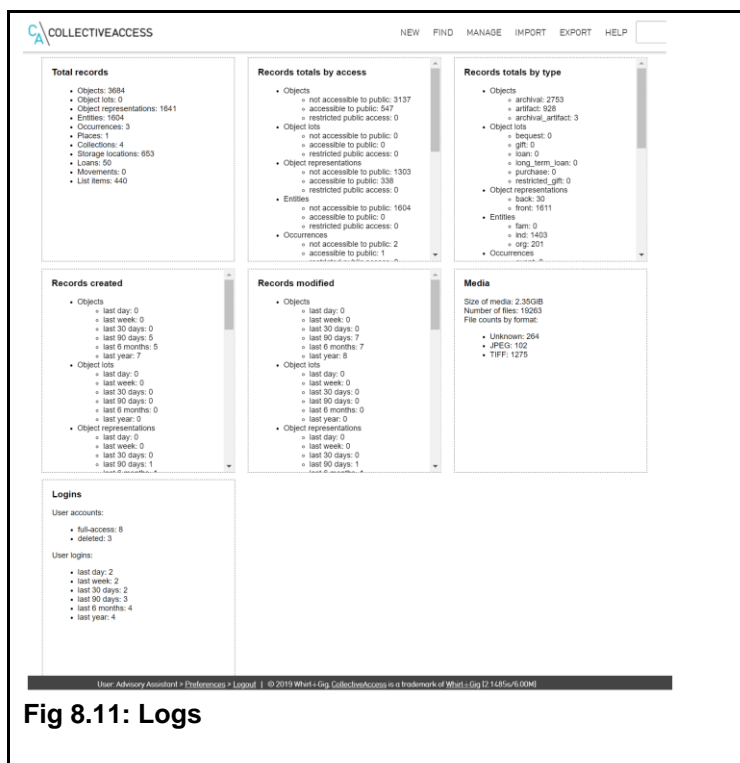


Fig 8.11: Logs

9. Sharing Records Online

i. NovaMuse

When editing a record, navigate to the Basic Info tab. The “access” drop-down sets whether or not the record is accessible on [NovaMuse](#). Choose “accessible to public” from the drop-down menu to share a record on NovaMuse ([Fig. 9.1](#)). Please note: do not share records listed as loans on NovaMuse.

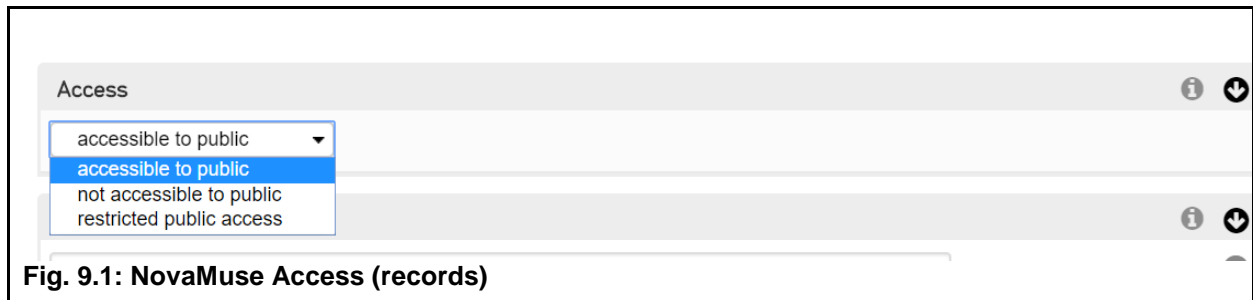


Fig. 9.1: NovaMuse Access (records)

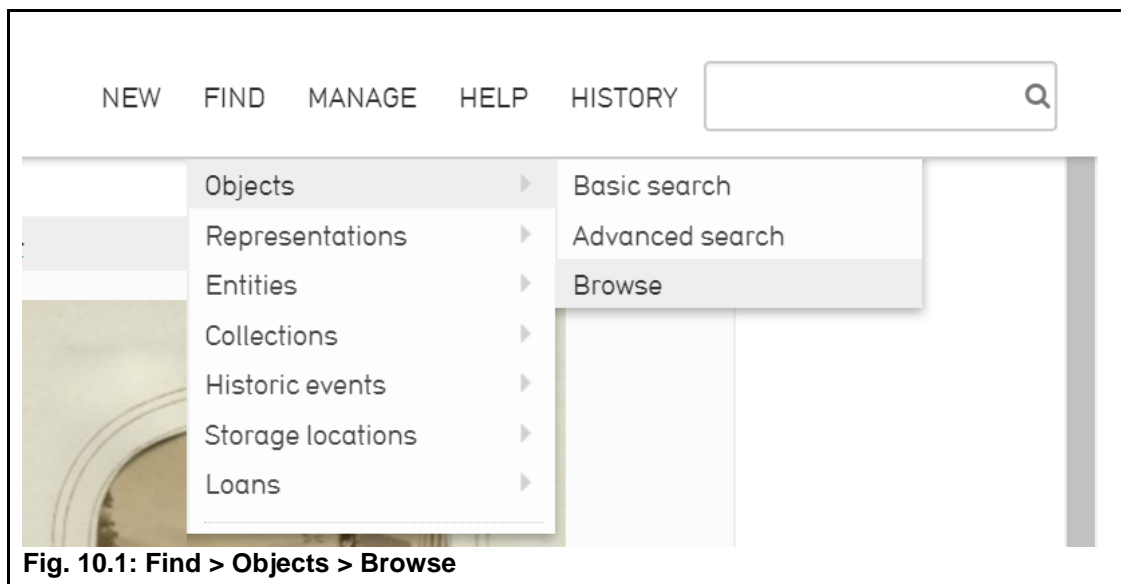
To share associated images, navigate to the Media tab. Each image must be set to “accessible to public” in order for it to be shared on NovaMuse ([Fig. 9.2](#)). For the image to be transcribed on NovaMuse, choose “yes” from the “Transcribe?” drop-down menu. [See Section 2.b](#) for detailed instructions. A [YouTube tutorial](#) for NovaMuse users is available, which demonstrates how to use NovaMuse Transcribe.



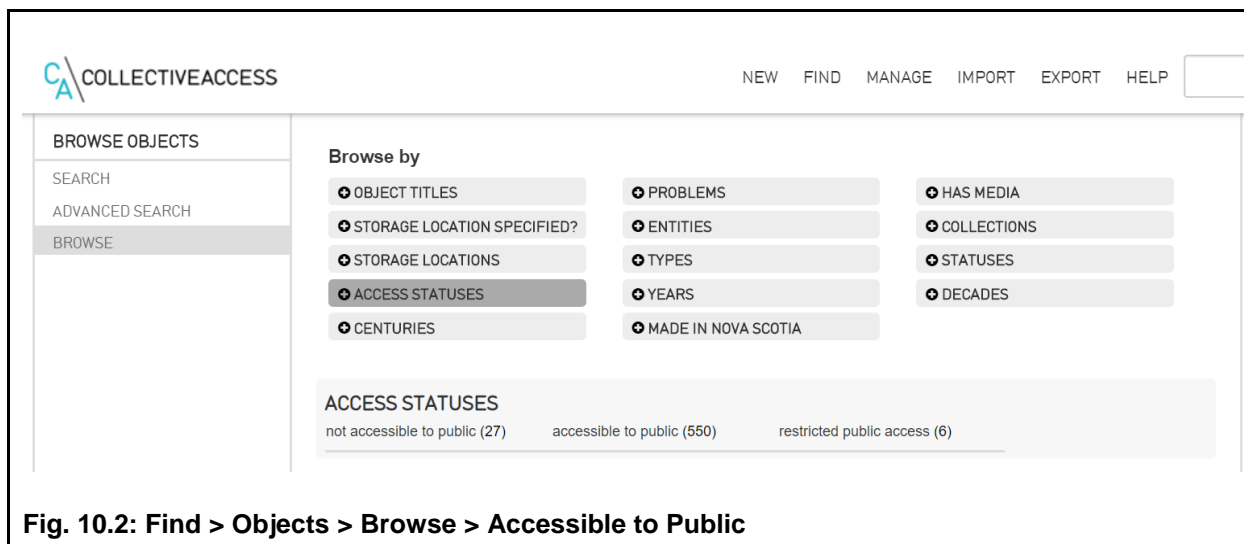
Fig. 9.2: NovaMuse Access (images)

j. Artefacts Canada

To share all records listed as “accessible to public” on Artefacts Canada, first complete a search using Find > Objects > Browse ([Fig.10.1](#)).



Listed Under “Browse by,” choose Access Statuses, and then “accessible to public” ([Fig. 10.2](#)). Please note: do not share records listed as loans on Artefacts Canada.



Click “Set Tools” ([Fig.10.3.1](#)) and enter “Artefacts Canada Export” in textbox labelled “Create set.” Then, click “Create” ([Fig.10.3.2](#)).

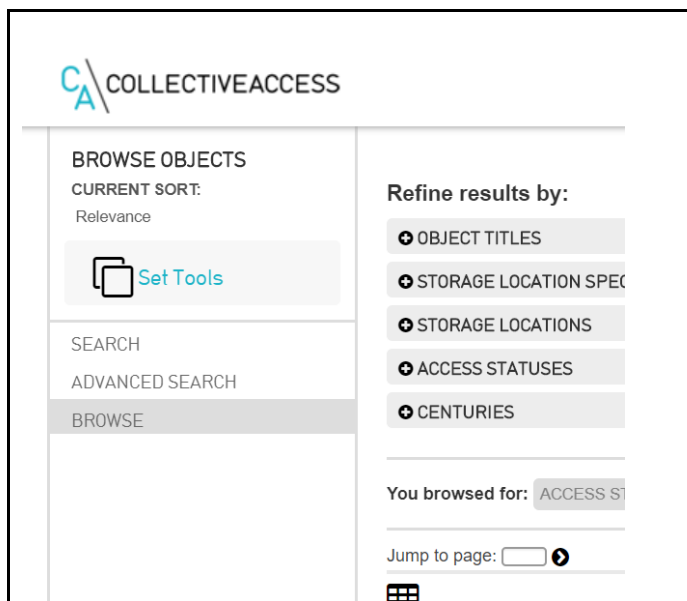


Fig.10.3.1: Creating Set for Artefacts Canada Export

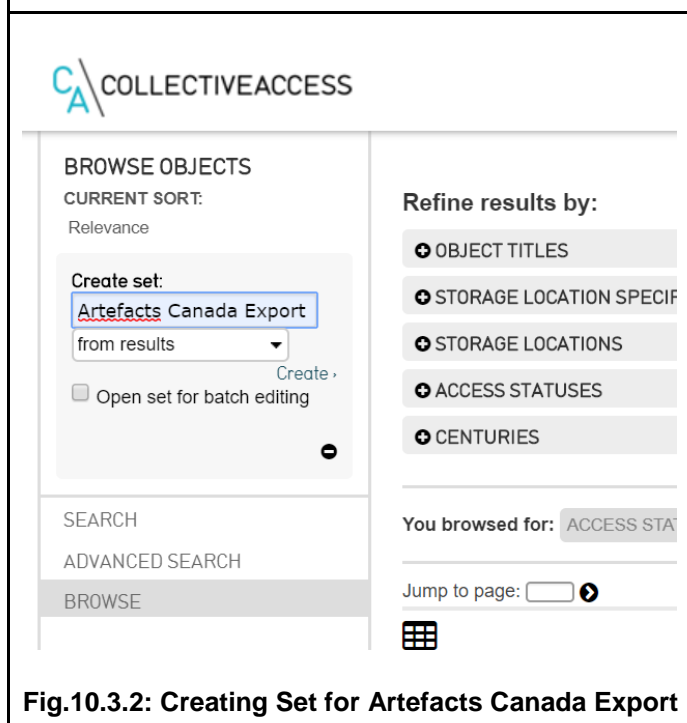


Fig.10.3.2: Creating Set for Artefacts Canada Export

Navigate to Export tab and choose “Artefacts Canada” ([Fig. 10.4](#)).

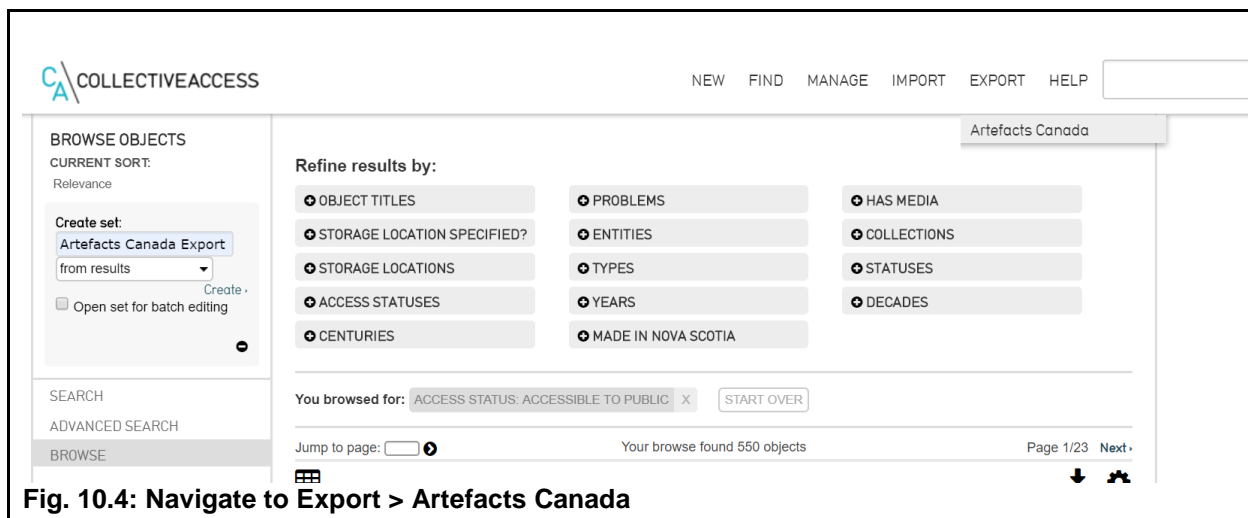


Fig. 10.4: Navigate to Export > Artefacts Canada

Choose the “Export to Artefacts Canada” set from the drop-down menu. Click “Export” ([Fig. 10.5](#)).



Fig. 10.5: Run Artefacts Canada Export

Send spreadsheet that downloads to ANSM staff requesting export to Artefacts Canada. Watch the [YouTube tutorial](#) for step-by-step instructions. Alternatively, contact the [Canadian Heritage Information Network \(CHIN\)](#) for further instructions.

10. YouTube Tutorials

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

[Adding an Object \(Basic\)](#)

[Adding Child Records](#)

[Adding Child Records Pt. 2](#)

[Adding Media and Georeferencing](#)

[Adding an Entity](#)

[Advanced Searches](#)

[Creating a Display](#)

[Creating and Using Sets](#)

[Editing the Dashboard](#)

[Editor Alerts](#)

[Error Assessment](#)

[Exporting Records to Artefacts Canada](#)

[Finding an Object](#)

[Help Menu](#)

[Help Text](#)

[Made in Nova Scotia](#)

[Managing Statistics](#)

[Progress Reports](#)

[Storage Locations](#)

[Transcription Tool](#)

[Using the Change Log](#)

Appendix

k. CollectiveAccess Help Text

BASIC INFO

Field	Current Help Text
Accession Number	<p>(Required) Enter the accession number; the unique record identifier for this item. The format should be the four digit year (YYYY), then the accession lot number, then the item number. For example, 2007.4.2</p> <p>Do not enter colons, commas, semicolons or symbols as part of an Accession Number.</p> <p>Do not use zeros as placeholders.</p> <p>Do not include part numbers here, such as for a pair of shoes that have been given the designation of A & B. Parts should be outlined in the Description field, and the number of detachable pieces entered in the Number of Components field.</p> <p>Do not change accession numbers even if they do not match current standards.</p>
Object Name	<p>(Required) Enter the name of the object according to Nomenclature 3.0 for Museum Cataloguing. The first letter of each word should be capitalized, for example Chair, Rocking instead of chair, rocking or CHAIR, ROCKING. Pick only one term from the range of terms (primary, secondary or tertiary) provided i.e. the term that is most appropriate and specific to the object. Uncertain data should be followed by a space and ?</p> <p>Modifiers that help to distinguish this item from similar ones of the same name are cited in the Object Type and Object Sub-type fields. Classification terms, descriptive modifiers, qualities and attributes should not be entered here but should be included in other fields such as Description, Material, Colour, Culture, etc.</p>

	<p>Research should be conducted on any unknown objects to determine their proper name, always focusing on the object's original intended use. If the object term does not appear in Nomenclature 3.0 follow the book's guidelines for adding object terms. If there is more than one name for the object, use the Alternative Name field to record other terms. Do not add qualifying data or extra details this field. The specific object type can be entered with more precision in the Object Type field (e.g. for a hospital bedside table, enter the term Table, Bedside in the Object Name field, and the term Hospital in the Object Type field).</p> <p>Classifications to which the item belongs are cited in the Category and Group fields.</p>
Object Type	<p>This field contains the descriptive modifier or secondary descriptor of the Object Name. Gender and age-based associations should be outlined here, such as Infant's, Child's, Woman's, Man's, or Doll's. Multiple terms can be used by clicking Add Object Type to duplicate the field, ensuring that one qualifier is entered per field line. Attributed data should be followed by a space and ?</p> <p>Do not duplicate the object name in this field.</p>
Object Sub-Type	<p>This field contains the secondary descriptive modifier of the object. Attributed data should be followed by a space and ?</p>
Category	<p>(Required) This field is used to group items based on their original use and is a preset dropdown menu. Enter the sub-classification (3rd level category) as outlined in Nomenclature 3.0 for Museum Cataloguing. If an object had multiple uses and fits more than one sub-classification, the field can be duplicated and the appropriate information selected from the dropdown menu by clicking on Add Category.</p> <p>Do not enter all three levels of Category, Classification and Sub-Classification. The dropdown menu is a hierarchy and the system understands which Category and Sub-Classification apply once the Sub-Classification has been selected.</p>
Sources	<p>(Required) Use this field to record the last legal owner prior to acquisition by the museum, i.e. the person who signed over legal title of the object to the museum. Contact information, birth & death dates, notes etc are entered onto the entity form according to the</p>

	<p>fields provided. For organizations, enter the name of the company or institution in the Source field and in the Cataloguer Remarks field note who signed for the gift on behalf of the company. For donations of jointly-owned property (i.e. siblings donating an object from their parents' estate), click the <i>Add Source</i> button to duplicate the field and enter each individual separately.</p>
Acquisition Method	<p>(Required) Use the dropdown menu to select how the museum acquired the item. In the event that paper documentation is lost, this is the museum's proof of ownership of the object. Record "purchase" for any acquisition for which the museum gave money. Record "gift" for any acquisition received without the museum giving payment (whether or not a tax receipt was issued). This includes bequests. Record "transfer" for any acquisition received by the museum from another department within the museum's governing society, corporation, or government body. Loans are not a method of acquisition.</p> <p>Note: if paper documentation is lost, this becomes your proof of ownership.</p> <p>This field displays on the Administration Page and Basic Page.</p>
Access	<p>This is a dropdown menu that determines online access to the collection record. Choose "accessible to public" to approve online publishing, or "not accessible to public" to keep the record for internal use only. There is also "restricted public access" which publishes it online for specific sets of users. The default setting is "not accessible to public".</p> <p>Note: if any media files are attached to the record on the Media Page, their access level must also be set to accessible in order for them to be published online.</p>
Title	<p>This field is for fine art and other objects that are titled, such as paintings, books, CDs, or records. Enter the preferred creator-given title for the object without quotation marks or additional punctuation. If the object has multiple titles, record the preferred title in Title, and then click on <i>Add Title</i> to duplicate the field and enter any additional titles. If there is important information in the title (e.g. information about the subject, materials, location, etc), also record that information in the appropriate fields. If the artist, writer, maker or designer did not assign a title, this field is left blank.</p> <p>Do not use this field for household objects, tools, equipment,</p>

	<p>clothing, etc.</p> <p>Do not use the term untitled unless the creator has deliberately named the work Untitled.</p>
Description	<p>Provide a physical description of the object to create an accurate picture of it with words. Record only factual, objective information determined through careful observation. Where information is likely true but not confirmed, indicate accordingly or add a question mark. Where appropriate, use technical vocabulary to improve the accuracy of your description. At the same time, avoid terms that are so specialized they cannot be easily understood.</p> <p>All information that is in the Description and is required for retrieval should also be indexed in appropriate fields elsewhere in the record.</p> <p>Start with the object's most obvious physical features to provide an overall picture of it to which the 'mental eye' can apply details. For example, describe the object's shape with reference to the closest geometric form, or a commonly recognized form. Next describe physical characteristics which pertain to the object as a whole, such as the finish on wood, glaze on ceramics, or weave and pattern in textiles. Then describe the object's distinguishing details in some kind of logical order, for example, beginning at the top and systematically working towards the bottom, or vice versa. If the object consists of composite materials include specific reference to the components to which they relate. Include specific dimensions of the object in your description only if you feel they provide important information, and they are not already recorded in the Dimension Remarks or Cataloguer's Remarks fields. If the object has parts, be sure to include the letter or number designation for that part at the beginning of its description.</p> <p>Do not use subjective language (i.e. old, big, fancy), abbreviations or slang.</p> <p>Do not describe the condition of the object in this field. Instead record this information under Condition Remarks.</p> <p>Do not record the details of any distinguishing text that appears on the object in this field. Instead, generally describe the nature of textual information and then transcribe this in the Marks/Labels field.</p>
Begin and End	Enter a numeric date or date range to denote when the object was

Dates	made. For archival documents such as diaries or ledgers, enter the date range for when the document was edited. If the year alone is not precise enough, record a more precise date, such as May 13, 1942. If a date is not known, determine a possible date range based on available information, such as 1900 to 1970. Qualifying terms can be used: Circa = approximate date, determined by researching other sources. Before = created before a certain date. "After" should not be used as a qualifier since it is known the object was made prior to entering the museum, allowing a date range to be applied.
History of Use	<p>Describe the original and subsequent use(s) of an object, in chronological order, and using paragraph form. General information that explains the item's role in the evolution of science and technology, and/or its significance to the community, should be entered here. Specific information about the people, experiences, and life history of the item should be entered in the Narrative field. All information that is in the History of Use field and is required for retrieval should also be indexed in appropriate fields elsewhere in the record.</p> <p>Include any references in the Catalogue Reference field and any hyperlinks on the Web Links page.</p> <p>Do not include private information, such as the name of the donor.</p> <p>Do not use abbreviations or slang unless you explain their meaning.</p>
Materials	<p>Enter the object's major materials in order from most predominant to least predominant, separated by a semicolon and space. Use lowercase except where the material is distinguished by a proper noun, such as Carrara marble, or is known by its brand name, such as Formica™. When applicable, include both general and specific terms for a material, separated by a comma, i.e. wood, pine or metal, copper. If the specific material is unknown, enter the general material, such as wood. Uncertain data should be followed by a space and ?</p> <p>Do not use abbreviations or slang.</p>
Measurements	Enter the greatest overall metric dimensions of the object using the applicable fields. Enter the numerical value with the appropriate metric unit, i.e. 20.3 cm. For objects with parts, record the overall dimensions of the object assembled. Measurements for significant parts (important for research or storage purposes) should be

	<p>recorded under Dimension Remarks and specifically identified with the part number, for example: The print (part A) was measured without being removed from the frame (part B).</p> <p>Do not measure the object using the Imperial system (inches).</p>
Quantity	<p>Enter the number of identical items included in the catalogue record. For example, rather than entering 6 individual records for a set of dishes, create one record for the set and enter the number 6 in this field.</p>
Number of Components	<p>Enter the number of detachable pieces or parts that make up the object described in this record. Generally, a component is a removable or separate part that is integral to the object and cannot be used for its intended purpose without the other part(s). For example, a sugar bowl with a lid has two components.</p>
Related Storage Locations	<p>(Required) This field indicates the building, room, and unit where the item is permanently located or stored. Storage Locations are preset in the database as a hierarchy. By typing in the name of the most specific location, i.e. Drawer 3, the system will generate suggestions from which you can select the appropriate location.</p>
Initial Condition	<p>Select the term from the drop down list which best describes the overall condition of the object at the time of acquisition.</p> <p>Excellent – no damage/deterioration</p> <p>Very Good – normal signs of wear</p> <p>Good – slight damage/deterioration, dirty</p> <p>Fair – problems more severe, handling and exhibit concerns</p> <p>Poor – unstable, difficult handling, needs attention</p> <p>Very Poor – severe deterioration, should not be handled or used for exhibits</p>
Condition Remarks	<p>Use this field to describe the object's condition, outlining location and extent of damage, deterioration and/or wear. For example: Photograph is torn in lower right corner. If the object requires specific handling instructions related to its condition, record them here.</p> <p>Do not repeat the general condition term</p>

Status	This field denotes the level of completeness of the record. Select from the dropdown menu to tag items that are undergoing editing, require review, or have been completed.

ENRICHED

Field	Current Help Text
Made in Nova Scotia	Authority list connected to the NS Industries Database.
Manufacturing Technique	This field indicates the processes, methods or techniques used to manufacture the item. The term(s) should be entered in lower case except when a proper noun is part of the term. Use the past tense; ie carved, cast, sculpted, or sewn. For objects which were created by multiple techniques, click on Add Manufacturing Technique to duplicate the field, and enter each technique on its own line. Complex modern items mass-produced in factories can simply be referred to as manufactured.
Related Entities	<p>Any and all people, organizations, and/or companies associated with the item should be added here. This field draws from the entity list in the database, so once you begin typing a name the system will generate suggestions from which to choose. Click on the correct name, and then choose the person/organization's role from the drop down list. Options include author, collector, conservator, creator, examiner, manufacturer, merchant, original owner, and source. If multiple names need to be added, click the <i>Add Relationship</i> button to duplicate the field and enter each individual separately.</p> <p>Note: This field also displays on the Enriched Page.</p>
Signature	Provide details about the form and location of the artist's or maker's signature as it appears on the object, i.e. Written in black ink in lower right corner: T.A. Stone.
Narrative	Use this field to record details about this specific object's history, including its use, the history of the owner, business, events, etc. that relate to the object. Enter the information in chronological order. Try to avoid including "general history", for example the record of a rifle used at the Battle of the Somme should have noted that it was used in that battle, but general history of the battle itself or WWI is

	<p>unnecessary. All information that is in the Narrative and is required for retrieval should also be indexed in appropriate fields elsewhere in the record.</p> <p>Include any references in the Catalogue Reference field and any hyperlinks on the Web Links page.</p> <p>Do not include private information, such as the name of the donor.</p> <p>Do not use abbreviations or slang unless you explain their meaning.</p>
Colour	<p>Enter the distinguishing colours that will help to identify the object, in order of most predominant to least predominant, and separating multiple entries by a semi-colon and space. For example: Blue; Yellow; Green</p> <p>Do not include information about which parts of the object are which colour.</p>
Marks/Label	<p>Note the location and method of all markings and/or labels on the object, such as manufacturer stamps and symbols, clothing labels, etc. Outline how the marking was made, ie stamped, engraved, written, and transcribe the information. Line breaks can be expressed by a forward slash. For example, Oval paper label on the bottom of the chair states: Made by J.W. Stanley / Digby.</p> <p>Do not transcribe long sections of text such as the description on the back cover of a book.</p> <p>Do not use quotation marks unless they are on the mark/label.</p>
Culture	<p>This field identifies the culture associated with the object based on its social/geographic origin. Enter the name of the culture, capitalizing the first letter and using the adjectival form, ie Acadian, Mi'kmaq, Scottish, etc. Multiple cultures should be entered separately, using the Add Culture button to duplicate the field. Uncertain data should be followed by a space and ?</p> <p>Do not include any other explanatory information in this field.</p>
Military Unit	<p>Enter the full name of the battalion, regiment, company, squadron, etc. that is specifically associated with the object. For example, 435 Transport and Rescue Squadron or The Halifax Rifles. If multiple</p>

	<p>units are connected to the item, click on Add Military Unit to duplicate the field, entering each unit on its own line. Attributed data should be followed by a space and ?</p> <p>Do not use abbreviations, acronyms or slang terms.</p>
Vessel Name	<p>Enter the full name of the vessel(s) associated with the object, formatting as follows: ship name, type abbreviation. For example: Sackville, HMCS. If more than one vessel is connected to the item, click on Add Vessel Name to duplicate the field. Each vessel should be entered on its own field line. Attributed data should be followed by a space and ?</p>
Group	<p>This field can be used to connect associated items in ways not covered by the Category field or Relationships Page. Political parties, fraternities or other organizations, sports, etc., are examples of grouping options. Attributed data should be followed by a space and ?</p>
Brand	<p>Enter the brand name of the manufactured product, such as Cheerios. For multiple brand names, click <i>Add Brand</i> to duplicate the field and enter each on its own line. Attributed data should be followed by a space and ?</p>
Model	<p>This field contains the manufacturer's model name and/or number for the object, for example model 612b. Multiple entries can be added by clicking on <i>Add Model</i> to duplicate the field. Each different model name or number should be entered on its own line. Attributed data should be followed by a space and ?</p>
Serial Numbers	<p>This field contains the unique serial number assigned to the object by the maker. Enter the number as it appears on the item, for example sn123456. If there are multiple serial numbers, click on <i>Add Serial Number</i> to duplicate the field and enter each number on its own line.</p>
Patent Dates and/or Numbers	<p>Enter all patent/copyright dates and/or numbers as they appear on the object, such as Patent no.651234. Multiple entries can be added by clicking on Add Patent Date and/or Number to duplicate the field. Different dates or numbers should be entered on their own line.</p>
Subject	<p>For artifacts, this field contains keywords or terms that refer to iconographic content of the object, such as in paintings, photographs or postcards. For archival records, this field contains terms which briefly describe the main topic of the item, such as streetscape, farming, etc. The recommended standard list is the Nova Scotia Subject Headings Authority. Multiple subjects can be assigned by clicking Add Subject to duplicate the field; each subject term being</p>

	entered on its own line. Attributed data should be followed by a space and ?
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ADMINISTRATIVE

Field	Current Help Text
Other Numbers	This field is to record old accession numbers, temporary catalogue numbers, or other identifying codes that were assigned to the object. Multiple numbers can be assigned by clicking <i>Add Other Numbers</i> to duplicate the field; each number should be entered on its own line.
Acquisition Method	<p>(Required) Use the dropdown menu to select how the museum acquired the item. In the event that paper documentation is lost, this is the museum's proof of ownership of the object.</p> <p>Record "purchase" for any acquisition for which the museum gave money. Record "gift" for any acquisition received without the museum giving payment (whether or not a tax receipt was issued). This includes bequests. Record "transfer" for any acquisition received by the museum from another department within the museum's governing society, corporation, or government body. Loans are not a method of acquisition.</p> <p>Note: if paper documentation is lost, this becomes your proof of ownership.</p> <p>This field displays on the Administration Page and Basic Page.</p>
Acquisition Date	<p>Enter the date that the museum obtained the item. The date format should be Month Day Year, for example April 12 1949. If the day and/or month are not known, enter the month and year, or just the year. In the case of very early acquisitions, if no date is known leave this field blank.</p> <p>Note: if paper documentation is lost, this becomes your proof of ownership.</p>
Accession Date	Enter the date that the museum formally accepted legal ownership of the object, i.e. the date the donor signed the Gift Agreement form, or the date of sale, etc. The date format should be Month Day Year, for example April 12 1949. If the day and/or month are not known, enter the month and year, or just the year. In the case of very early accessions, if no date is known leave this field blank.

	<p>Note: if paper documentation is lost, this becomes your proof of ownership.</p>
Object Nature	<p>This field indicates the status of the item, i.e. whether it is an original, copy, replica, reproduction, or of unknown nature. Choose the appropriate term from the dropdown list.</p>
Photo Number	<p>This field contains the code or reference number assigned to prints, negatives or slides related to the item. For instance, if a professional photographer wrote <i>ColeHbr 1943-1</i> as a reference number on the edge of a slide, document this number here. If there are multiple codes, click <i>Add Photo Number</i> to duplicate the field, and add each code on its own line.</p> <p>Do not enter the file names of images that are attached to the collection record.</p>
Check this box if you hold the copyright for this item	<p>To check this box, copyright must have been transferred from the copyright holder, or the item must be out of copyright and in the public domain.</p> <p>Note: Copyright is separate from physical ownership.</p>
Cataloguer	<p>User this field to record the name of the individual responsible for completing the initial catalogue worksheet for this item. Enter names in the following format: Last Name, First Name. For example: Ring, Dorothy. If more than one person catalogued the item, separate multiple entries by a semi-colon and space.</p> <p>Do not change this name when an adjustment is made to the record.</p>
Cataloguer Date	<p>This field indicates the date on which the initial catalogue worksheet was completed for the item. Enter the date in the following format: Month Day Year.</p> <p>Do not change this date when an adjustment is made to the record.</p>
Cataloguer Remarks	<p>Use this field to record miscellaneous administrative notes about the item, i.e. important information pertaining to the object but that should not necessarily be made public. This can include remarks about the acquisition process, inventories conducted, research required, etc. For example: Object found in collection during 1987 inventory.</p>

Catalogue Reference	<p>Use this field to record any references used during the cataloguing process, whether they are books or interviews with experts. Enter the references in a technical citation style, generally in the format of: Author last name, first name, Year. Title of article, journal or book. Editor, Publisher, City. Pages. If multiple references need to be listed, click <i>Add Catalogue Reference</i> to duplicate the field, and add each entry on its own line.</p> <p>Do not enter website links here. They should be entered on the Web Links page.</p>
Exhibit History	<p>This field contains the history of exhibitions in which the item was included. Enter the full name of the exhibit followed by the date or range of dates that the exhibit was on display. For example: From the Cradle to the Grave Exhibit, Summer 2009. If the item has been used in multiple exhibits, click <i>Add Exhibit History</i> to duplicate the field, and add each entry on its own line. Multiple entries should be listed in chronological order.</p>
Restrictions	<p>This field gives details of restrictions on the item and/or record. These can be related to the condition requirements, such as keeping an object away from bright lights or heat sources. They could also be related to security issues, such as removing an object from display and locking it in a safe overnight. For archival holdings, restrictions are often based on the information contained in a document or file, i.e. public access may not be granted until a certain year or until after the donor is deceased, or a photograph may not be copied without the permission of the copyright holder.</p>
Deaccession	<p>This field immediately flags the item as deaccessioned. Record the Deaccession Date in the form Month Day Year. Select the applicable Deaccession Mode from the dropdown list.</p> <p>Do not delete deaccessioned items from the database.</p> <p>Note: Proper procedures must be followed for every deaccession. A Deaccession proposal and worksheet must be completed. Do not use this field in lieu of proper documentation.</p> <p>Note: You must change the status of the record to "not accessible to public."</p>

MEDIA

Field	Current Help Text
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Media Representations	<p>This page is for adding any image, audio, video, document, and/or multimedia files associated with the object. File names must match the accession number, replacing the dots with dashes or underscores. For example, the photograph of a chair numbered 1990.3.5 would be saved as 1990_3_5.jpg. To attach more than one media file, click <i>Add Representation</i> to duplicate the field. Additional views or media files follow this same format with a qualifying term at the end, such as 1990_3_5_side.jpg or 1990_3_5_label.jpg.</p>
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CONDITION REPORT

Field	Current Help Text
Examination Date	<p>Enter the date that the condition report was completed on this item. When additional examinations are made, click Add Examination Date to duplicate the field, adding each date on its own line in chronological order. Dates should be formatted as Month Day Year.</p>
Examiners	<p>Enter the name of the individual responsible for completing the condition report for this item. If multiple people were involved, click Add Examiner to duplicate the field, entering each person on their own line.</p> <p>Note: This field is linked to the Related Entities field.</p>
Conservators	<p>Enter the name of the professional conservator who worked on the object, conducting repairs or stabilizing the item. If conservation work was done by different conservators, click Add Conservator to duplicate the field, adding each conservator on their own line.</p> <p>Note: This field is linked to the Related Entities field.</p>
Materials	<p>Enter the object's major materials in order from most predominant to least predominant, separated by a semicolon and space. Use lowercase except where the material is distinguished by a proper noun, such as Carrara marble, or is known by its brand name, such as Formica™. When applicable, include both general and specific</p>

	<p>terms for a material, separated by a comma, i.e. wood, pine or metal, copper. If the specific material is unknown, enter the general material, such as wood. Uncertain data should be followed by a space and ?</p> <p>Do not use abbreviations or slang.</p>
Mounting Storage	<p>This field indicates how the item has been stored or housed in the museum. If the item is stored differently than it is displayed, outline each method. For example: When in storage the dress is kept on a padded hanger on the textile storage rack, which is covered with cotton sheeting. On display a 19th century mannequin form is used.</p> <p>Do not enter the formal storage location in this field as it is already entered elsewhere.</p>
Conservation Notes	<p>This field contains remarks about any conservation, preservation or treatment not covered in other fields. This may include recommendations from the conservator on care and handling of the item, frequency and methods of environmental monitoring, etc. It can also include notes on how the item was treated in the past, such as the donor having made a repair to a vase with crazy glue. If multiple condition reports have been completed and different conservators left notes, click <i>Add Conservation Notes</i> to duplicate the field and enter each note on its own line, being sure to mention the date & author of the notes.</p>
Treatments	<p>Make brief notes about procedures or actions that the object has undergone to repair, preserve, or stabilize it. Full treatment reports from conservators can be attached to the record as media files, but should be set as Not Accessible to Public.</p>

ALTERNATE NAMES

Field	Current Help Text
Alternate Names	<p>Enter any name variations for the item, such as local slang terms, colloquialisms, alternate spellings, etc. If multiple alternatives exist, click Add Name to duplicate the field and enter one on its own line. Attributed or uncertain alternate names should be followed by a space and ?</p>

RELATIONSHIPS

Field	Current Help Text
Related Objects	<p>Use this field to link other objects in the collection that are similar or are in some way connected. The field is a lookup, and searches can be done by Accession Number or Object Name. If multiple items need to be linked, click on <i>Add Relationship</i> to duplicate the field. Each item must be entered on its own line, and the relationship type selected from the dropdown menu – is version of, references, has version, is referenced by, or is related to.</p> <p>Do not link all items connected to an individual as the system links these through the Related Entities field.</p>
Related Entities	<p>Any and all people, organizations, and/or companies associated with the item should be added here. This field draws from the entity list in the database, so once you begin typing a name the system will generate suggestions from which to choose. Click on the correct name, and then choose the person/organization's role from the drop down list. Options include author, collector, conservator, creator, examiner, manufacturer, merchant, original owner, and source. If multiple names need to be added, click the <i>Add Relationship</i> button to duplicate the field and enter each individual separately.</p> <p>Note: This field also displays on the Enriched Page.</p>
Related Events	<p>This field lists any historical events to which the item was connected. The event may be local in scope, such as a church picnic, or broader and well known, such as the Battle of Vimy Ridge. This field draws from the historical events list in the database, so once you begin typing a name the system will generate suggestions from which to choose. If multiple events need to be added, click the <i>Add Relationship</i> button to duplicate the field and enter each individual separately.</p>
Related Collections	<p>This field is for tagging the item as being part of a large-scale collection, such as coming from a heritage institution that closed. This field draws from the collections list in the database, so once you begin typing a name the system will generate suggestions from which to choose. If multiple collections need to be added, click the <i>Add Relationship</i> button to duplicate the field and enter each individual separately.</p> <p>Do not use this field to create collections for every donor.</p>

Related Loans	This field draws from the loans list in the database, so once you begin typing a loan number or object name the system will generate suggestions from which to choose. If no loan record has been created, go to New – Loan, and create a record for that item. The item can then be linked as being part of the loan.
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WEB LINKS

Field	Current Help Text
External Links	<p>Enter catalogue reference sites or any other useful links that relate to the item.</p> <p>To add more than one link, click <i>Add External Links</i>.</p>

I. Record Example



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COMMENTS AND TAGS (0)

ASK A CURATOR

LORDLY HOUSE MUSEUM

Teapot

ACCESSION NUMBER: 2014.23

CATEGORY: Serving vessel

DATE: 1899

MATERIALS: porcelain

MEASUREMENTS: 14.5 cm H x 13 cm DiameterTeapot

MEASUREMENTS: 14.5 cm H x 13 cm Diameter x 14.5 cm H x 16.7 cm DiameterPad, 1 lot

BRAND: Carlton Ware;Wiltshaw and Robinson Limited

MARKS/LABEL: The Carlton Ware backstamp is located on the bottom of the teapot/hot pad and reads W & R Stoke on Trent with Carlton Ware below it. There is a registered number printed below this which reads Rd. No. 332264.

CULTURE: English

NARRATIVE: This particular teapot and accompanying hot pad were made by Wiltshaw and Robinson Ltd. (under the trade name Carlton Ware) in 1899, which is indicated by the registration number and backstamp found on the bottom of the teapot. According to information supplied by The Cochrane & Pettit Archive of Carlton Ware collected from The National Archives, any object with a registration number between 331707 and 351201 was created in 1899, therefore giving a very accurate date to this teapot.

This particular teapot features the blue and white pattern which was called Nankin, which was printed in blue and the less common pale blue colours (this teapot featuring cobalt blue colouring). These patterns were "traditional in nature and often [copied] or [took] their inspiration from patterns found on porcelain imported from China during the eighteenth century." This design was similar to the popular Willow Pattern from the 1790s but did not feature lovers, birds or bridges which were characteristic of that pattern.

DESCRIPTION: This object is a Carlton Ware teapot and accompanying hot pad featuring a pattern similar to the Blue Willow pattern (called Nankin) on the sides of the teapot as well as the lid and hot pad. The handle and spout of the teapot are a much darker blue colour (appears black) with gold detailing. The teapot lid and hot pad also contain gold detailing. The handle is not a traditional rounded handle, but rather has a squared-off top.

HISTORY OF USE: Though tea has been consumed since ancient times, the teapot is a relatively new invention, "officially" coming into existence about 500 years ago, or at least this is its first recorded existence. It is generally known that the teapot began around the year 1500 coming from China. The teapot still remained relatively unknown until the Ming Dynasty in the 1600s. Shortly after this, Japan imported artists from China to teach potting methods. It wasn't until the 17th century that Europeans were introduced to Chinese pottery by the East India Company (who ended the imports

of Chinese porcelain in 1791). The innovation of bone china around the turn of the 19th century changed everything with its "deceptive toughness, refinement and ease of manufacture." This allowed the innovation of decorative techniques by the mid-19th century, including Baroque and Rococo designs. As industrialization happened, the middle class had high demand for teapots in order to liken themselves to the upper class lifestyle which resulted in "the emergence of 'afternoon tea.'" It wasn't until after the War of 1812 that teapots finally were brought to America, often depicting scenes of American landscapes and the war victory, and by the mid-19th century the American pottery industry was booming. Today many teapots are not even used so much as vessels as they are for being show pieces.

MANUFACTURER: Carlton Ware



