Association of Nova Scotia Museums

CollectiveAccess Manual

Last updated: November 2025

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Accessing the Database

CollectiveAccess is a web-based system, meaning your collection can be viewed and managed from any device connected to the Internet, through browsers such as Chrome, Firefox, Safari, or Edge. Multiple people can work in the database at the same time, from different computers. Your database URL is hidden (i.e., it will not appear in search engine results or otherwise be accessible to the public); you must have the direct URL and user account details to use the database.

Logging In

Each user of CollectiveAccess requires a unique username and password - **do not share your login information with others**. Logins can be created at different levels of access; for example, a student-level login will only allow the user to edit basic information, whereas a cataloguer-level account provides the user with more permissions and options for editing. Users must contact ANSM to create and/or update accounts, or to reset passwords.

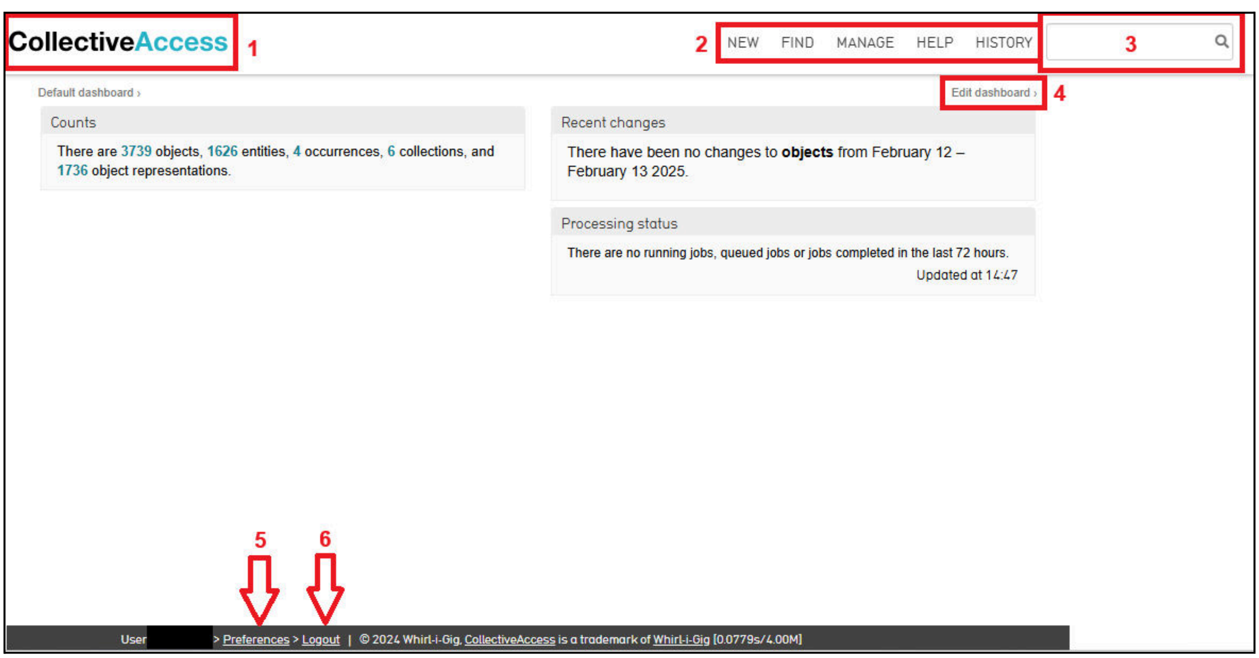
To log into the database:

1. Open your web browser and go to *[yourinstitution].ansmcollections.ca*.
2. Enter your username and password.
3. Click *Login*.

Navigating the Database

Dashboard

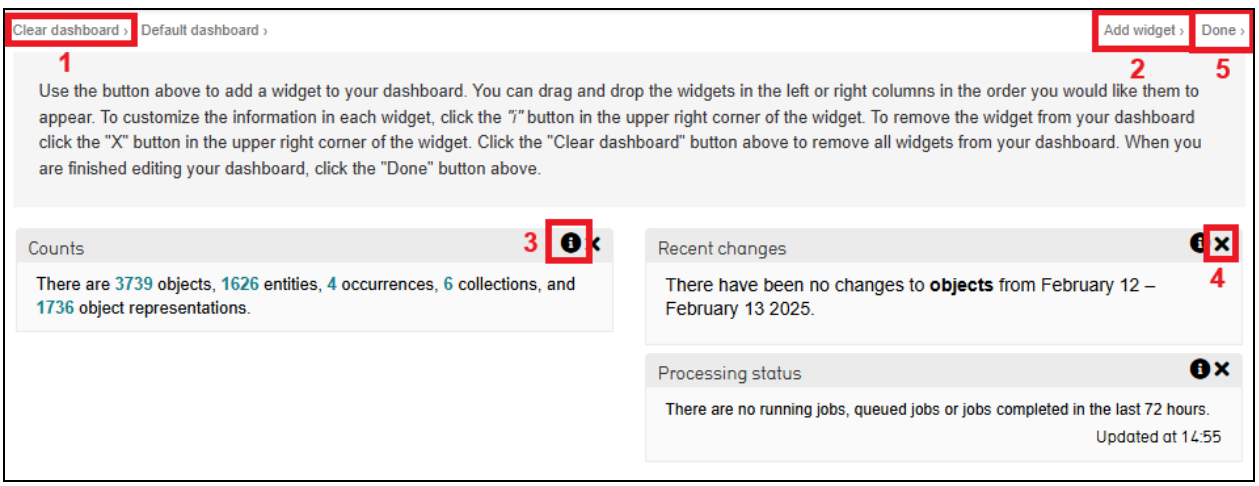
The dashboard is the home page of the database. Go back to this page by clicking the CollectiveAccess logo in the top left corner of the screen.



1. **CollectiveAccess logo / Home button** - clicking this logo will bring you back to the dashboard.
2. **Global navigation bar** - the bar has five sections: New, Find, Manage, Help, and History. These are the access points for viewing and editing your records and settings.
3. **Quick search -** this search bar allows you to quickly search by accession number or keyword. It will search all primary types of records in the database: Objects, Entities, Occurrences, Collections, Storage locations, and Loans.
4. **Edit Dashboard button** - this opens the *Edit dashboard* menu, which allows you to add, edit, move, and/or delete widgets. See also:
   CollectiveAccess Tutorial - Editing the Dashboard
5. **Preferences** - allows you to view and edit user preferences.
6. **Logout** - logs you out of the database. Note: quitting your browser does not automatically log you out.

Widgets

Widgets are small windows on the dashboard page which allow you to quickly access common or useful information. Click the *Edit dashboard* button to add, delete, or edit widgets and their placements.



1. **Clear dashboard** - click this to remove all widgets from the dashboard. Clicking *Default dashboard* will also reset the dashboard widgets to their original setting.
2. **Add widget -** click this to open the *Add a Widget* screen, where available widgets can be selected to display on your dashboard. A description of each widget is available under the widget name.
3. **Settings button** - click to edit the settings for that particular widget. For example, in the *Recent changes* widget, you can change the time frame from which changes are displayed.
4. **Delete button** - removes the widget from the dashboard.

5. **Done** - click here when you are done editing to return to the regular dashboard view. Widgets can only be added, removed, or moved around while in editing view, and do not become functional until you click *Done*.

To move a widget around, while in Edit dashboard mode, click on the grey bar at the top of the widget and drag it to a different spot on the page.

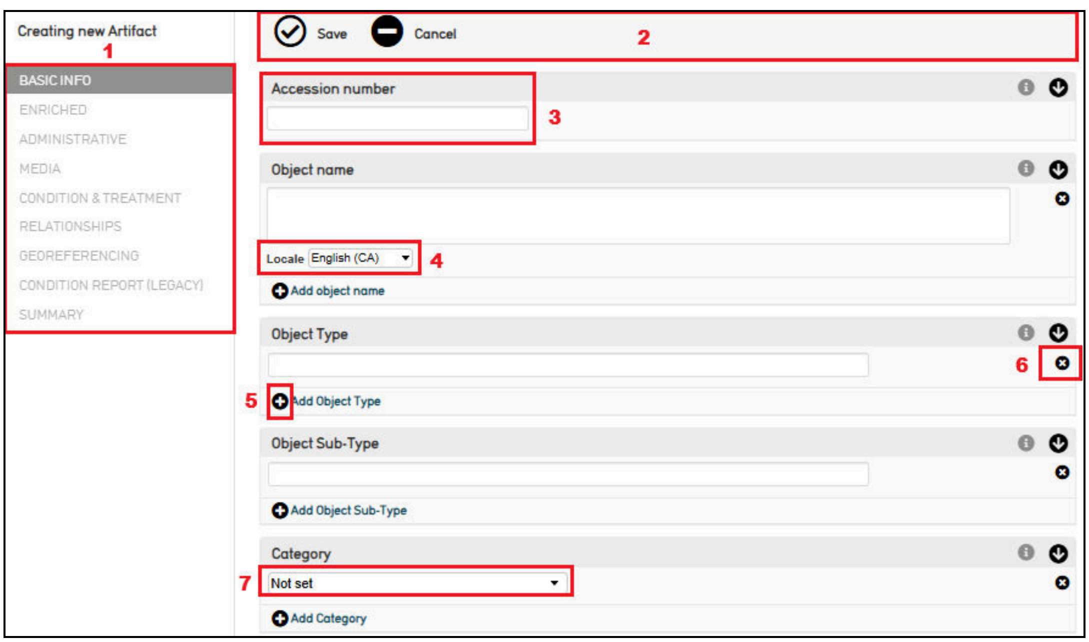
Global navigation bar

The global navigation bar is the main tool for interacting with the database. It contains five menu clusters - New, Find, Manage, Help, and History - and the quick search bar. Each of the five menus expands when the cursor is held over them, revealing more options.

1. **New** - contains options for creating new records. Use these options to create new object records, representations, entities, collections, condition & treatment reports, historic events, storage locations, and loans.
2. **Find** - contains options for finding records, including basic search, advanced search, or browse.
3. **Manage** - allows you to control the way you use CollectiveAccess, from user preferences to organizing how information is displayed. These options do not relate directly to your collection, but rather to how your database is administered. These are impacted by user level.
4. **History** - provides a list of recently viewed and/or edited records.
5. **Help** - allows you to view Frequently Asked Questions (FAQs), a list of Helpful Resources, and how to contact ANSM for support.

Records

Records are composed of a variety of menus, fields, and buttons. Records may contain all or some of the following features:



1. **Local navigation** - each record is divided into multiple screens, each of which contain entry points for different information. This section allows you to navigate between screens.
2. **Control bar** - displays options to *Save*, *Cancel*, or *Delete*. *Save* and *Cancel* affect changes made to the record, while clicking the *Delete* button will completely remove the record from the database. Records do not save automatically; you must remember to click Save after entering new information. The database will prompt you to save before navigating away from the page if changes were made. The *Delete* button is typically only available on cataloguer-level accounts.
3. **Field** - each record contains a series of named fields. Information to be entered in each field is explained by the built-in data dictionary, accessed by clicking the "i" button next to the name of the field.
    a. There are several types of fields used in the database:
        i. Basic text fields
        ii. Rich text fields - allow you to format text by bolding, italicizing, etc., using an in-browser text editor
        iii. Date fields, which only accept dates and date ranges
        iv. Measurements fields, which accept length and weight quantities using English or Metric units
        v. Web link (URL) fields
        vi. Dropdown menus
        vii. Lookup fields, which draw from a specific list, prompting you with items as you type.

    Restricted fields, like *Begin and End Dates* and *Measurements*, 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.
4. **Locale** - defines the language in which the content of the field is entered. The database supports English and French. Many fields, such as *Object name* and *Physical description*, allow only one entry in each language.
5. **Add button** - duplicates the associated field, providing an additional line for entering information.
6. **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 *Cancel* in the control bar.
7. **Dropdown menu** - allows you to select information from a pre-defined set of options.

Inspector window

The inspector window is the information that appears in the top left corner of an object record. When creating new records, this will only appear after the record is saved.

1. **Results** - navigate through your search results by clicking the arrows on the left and right. Return to the list of search results by clicking *Results*.
2. **Identifying information** - displays the object type, name, and accession number.
3. **Media thumbnail** - shows a thumbnail image of attached media. When there are multiple files attached to a record, arrow keys will appear on the left and right. Click the thumbnail to launch the Media Viewer, which allows you to zoom in, pan across the image, and download it in a range of sizes. The Media Viewer will also play audio/video and display documents.
4. **Watch/Unwatch this record** - click this to add/remove the selected object from your watch list, which can be accessed by selecting *Manage → My watched items* in the global navigation bar, or viewed by using the *Your Watched Items* widget. The icon turns red when the record is on the watch list.
5. **Change type** - allows you to change the record type from Artifact to Archival item or Artifact/Archival item (hybrid), and vice versa. Select the type from the dropdown menu and save. Note: as not all fields are available in each record type, ensure that all information is copied elsewhere to be transferred to new fields after the type has been changed before saving.
6. **Create a child record under this one** - add a new record that connects to the current (primary) record through a hierarchical order (i.e., parent > child). See also: CollectiveAccess Tutorial - Adding Child Records.
7. **See more information about this record** - collapses or expands the inspector window (i.e., hides or displays the "Created" and "Last changed" information).

Data Dictionary

CollectiveAccess Tutorial: Using the Help Text

Hovering your cursor over a field title, or clicking on the "i" button on the right side of the field, 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 using the CHIN Humanities Data Dictionary.

Entering Data

CollectiveAccess allows you to create records for three different types of objects: artifacts, archival items, and artifact/archival items (hybrid). In general, artifacts are 3-dimensional objects, while archival materials are 2-dimensional or digital objects (e.g., documents or records). 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.

For most fields, it is recommended to read the help text ("i" buttons) within the database for direction on information to enter. See: CollectiveAccess Tutorial: Using the Help Text. Links to YouTube tutorials are also provided throughout this manual.

Object records

This section will outline certain features of the database that require more context and/or instruction than is given in the "i" button text.

Adding an object

CollectiveAccess Tutorial - Adding an Object

1. In the global navigation bar, go to *New* → *Object* → then select the type of record to create (artifact, archival, or artifact/archival item [hybrid]).
2. A blank record will open to the Basic Info screen. Complete as many fields as possible. See also: CollectiveAccess Tutorial - Using the Nomenclature Website
3. Click *Save* at the top or bottom of the screen.

Screens

1. **Basic Info** - contains basic information about the object. Users should prioritize entering as much information here as possible.
2. **Enriched** - contains fields that can be completed if applicable.
3. **Administrative** - contains fields for internal use.
4. **Media** - upload images, audio or video recordings, and/or documents to a record.
5. **Condition & Treatment** - create condition reports, treatment proposals, and/or treatment reports.
6. **Relationships** - internally link records to other objects, entities, events, collections, or loans.

7. **Georeferencing** - link locations to records.
8. **Summary** - shows a summary of the information in a record, based on a chosen Display.
9. **Log** - displays changes made to a record by timestamp.

Public access

The *Access* field allows you to set whether or not a record is accessible to the public on NovaMuse. **Do not share records listed as loans on NovaMuse.**

When sharing records on NovaMuse, not all fields will transfer. It is important to put information in the correct fields so that confidential information does not become accessible. Below is a list of fields which do and do not display on NovaMuse:

Fields that DO display on NovaMuse	Fields that DO NOT display on NovaMuse
Accession number Alternate name Begin and End Dates Brand Category Culture File Fonds title Georeference Group History of use Made in Nova Scotia Manufacturing technique Marks/Label Materials Measurements Media representations (images) Military unit Model Narrative Object name Object subtype Object type Patent dates and/or numbers Physical description Scope and Content Serial numbers Series Signature Subject Sub-series Vessel name	Access Accession date Acquisition date Acquisition method Cataloguer Cataloguer date Catalogue reference Cataloguer remarks Check this box if you hold the copyright for this item Colour Condition reports Custodial history Deaccession Exhibit history External links Finding aid Initial condition Initial condition remarks Inventory history Location in hierarchy Notes Number of components Object nature Other numbers Quantity Photo number Related collections Related entities Related events Related loans Related objects Related storage locations Restrictions Scale

	Series information Sources Status Title Treatment proposals Treatments

Made in Nova Scotia database

CollectiveAccess Tutorial - Made in Nova Scotia

Allows the user to link the record to a Nova Scotian manufacturer, artisan, or maker, if they are listed in ANSM's separate database. Type the name of a person or organization into the field to see if a result appears below. If no result appears, contact ANSM to add the manufacturer/artisan/maker to the *Made in Nova Scotia* database.

Note: 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 dropdown menu that appears after the name has been entered.

Child Records

Adding a child record from primary record

CollectiveAccess Tutorial - Adding Child Records

1. Open the primary (i.e., parent) record.
2. From the inspector window, click on the *Create Child Record* (i.e., stick figure) button. This will open the *Create child record under this object* pop-up screen.
3. From the dropdown menu, select if the child record is an artifact, archival, or hybrid record.
4. Click *Save*.
5. The *Basic Info* screen for the new child record will open. Be sure to edit the accession number to reflect the accession number of the child object (i.e., add part numbers/letters - whichever system you use at your museum).
6. Complete as many fields as possible.
7. Click *Save*.
8. Repeat these steps as necessary to add additional records under the primary record.

Adding a child record from *Location in hierarchy* field

CollectiveAccess Tutorial - Adding Child Records Pt. 2

1. Open the primary (i.e., parent) record.
2. Navigate to the *Administrative* screen.
3. In the *Location in hierarchy* field, click *Show Hierarchy*.
4. Click *Add*.

5. Select the record type (Artifact, Archival item, Artifact/Archival item (hybrid)) from the first dropdown menu.
6. Select the hierarchical location (under (child) or above (parent)) of the new record from the second dropdown menu.
7. Click the plus sign (+) to add the new record.
8. A blank record will open to the *Basic Info* screen. Complete as many fields as possible.
9. Click *Save* at the top or bottom of the screen.

Changing a record type to child record

[CollectiveAccess Tutorial - Adding Child Records Pt. 2]

1. From an object record, navigate to the *Administrative* screen.
2. In the *Location in hierarchy* field, click *Show Hierarchy*.
3. Click *Move*.
4. Use the *Find* field to search for the primary (i.e., parent) record by accession number. Click the primary record from the search results.
5. A note saying *Will be moved under [primary record] after next save* will appear in red text. Click *Save* to complete the move.
6. Repeat these steps as necessary to add additional records under the primary record.

Removing a child record

[CollectiveAccess Tutorial - Adding Child Records Pt. 2]

1. From an object record, navigate to the *Administrative* screen.
2. In the *Location in hierarchy* field, click *Show Hierarchy*.
3. Click *Move*.
4. Click the scissors icon next to the child record within the hierarchy.
5. Click *Save*.

Media

The Media screen allows images, audio, video, and/or documents to be added to a record. Multiple files may be attached. Each file can be a maximum of 1.95 GB. Almost all file types can be uploaded.

Add media to a record

CollectiveAccess Tutorial - Attaching Media and Georeferencing

1. Click *Upload media*.
2. Navigate to the location on your computer of the file you wish to upload. Select the file, then click *Open*.
    a. The database will resize photos for you at various sizes; therefore, it is best to use the highest quality photos you have available.
3. A spinning circle with percentage complete status may appear under *Upload media* while the file is uploading. Wait until the file reaches 100% and the text changes to “1 selected” before saving.

4. To set the media to be visible on NovaMuse, select “access to public” from the *Access* dropdown menu.
    a. **If the object is on loan, do not make the media accessible to public.**
    b. Review the media/record for any copyright or privacy restrictions before setting it to “accessible to public”.
    c. If the museum deems that the material is sensitive, staff are advised to make an internal decision whether or not to set the media to “accessible to public”.
    d. This setting can later be changed by clicking *Edit* on the media representation.
5. To make the media appear on NovaMuse’s [Transcribe] page so the public can transcribe text from an image, select “Yes” from the *Transcribe?* dropdown menu. This setting can later be changed by clicking *Edit* on the media representation. See also:
    a. CollectiveAccessTutorial - Transcription Tool
    b. NovaMuse Transcribe Tutorial
6. To add an additional media file, click *Add representation*, and repeat the above steps.
7. To remove a media file, click the small X beside the media representation.
8. Click *Save*.
9. Depending on the size of the file and internet speed, “Image is being processed” may appear where the media thumbnail will show once the upload is complete. You can leave this page and continue with other work while this is processing. Use the “Processing status” widget to monitor the status of the file.
10. Click the image thumbnail to open the Media Viewer, which allows you to zoom in, pan across the image, and download it in a range of sizes. Close the Media Viewer by clicking “x Close” in the top right corner, or pressing the Escape key.

Add media to a record (using mobile device)

1. Login to CollectiveAccess on your mobile device (smartphone or tablet).
2. Access the record in which you are going to add media.
3. Click *Upload media*. A pop-up will appear that lets you select “Photo library”, “Take a photo”, or “Choose file”.
    a. **Photo library** - allow you to select an image/video from your device’s library.
    b. **Take a photo** - opens your camera app to allow you to take a photo, which will automatically upload.
    c. **Choose file** - allows you to select a file (i.e., document) from your device’s library.
4. Click *Save*.

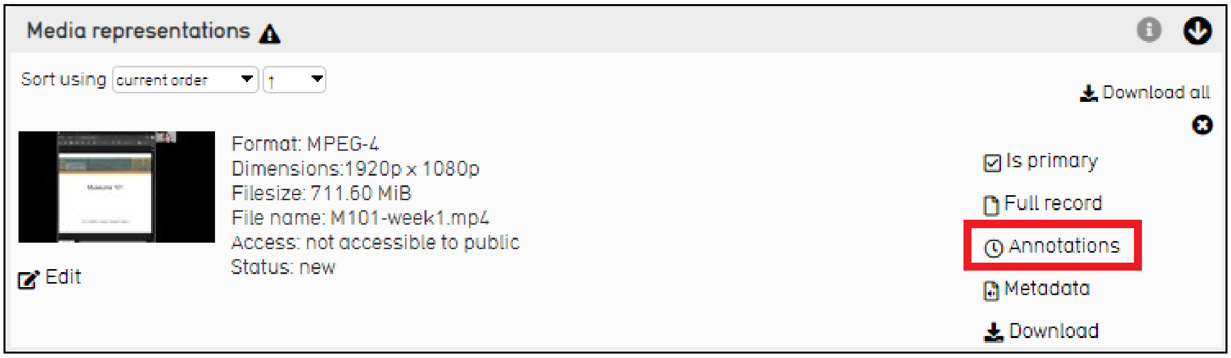
Media annotations

CollectiveAccess Tutorial: Media Annotations

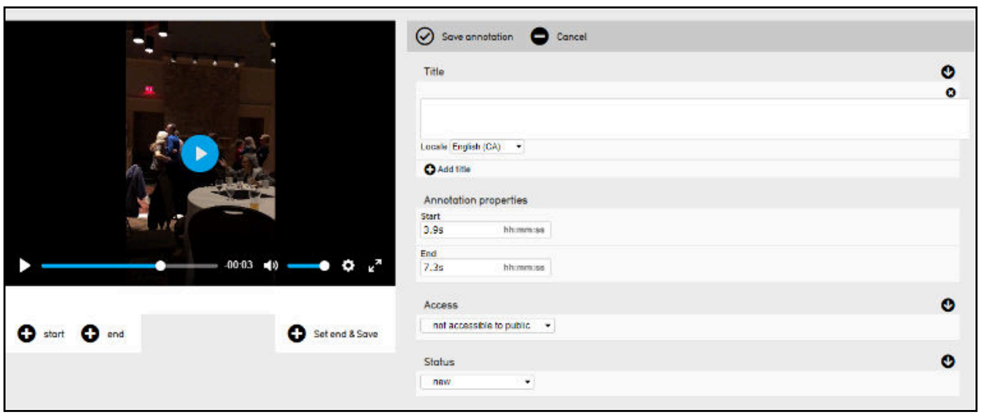
When uploading audio and/or video files, an *Annotations* button will appear on the media representation once the upload is complete. Use this function to highlight specific clips in the recording. For example, if the media is an oral history, you can identify what the interviewee is speaking about in different sections of the recording.

To add annotations:

1. Click *Annotations* in the right menu of the media representation. This will open a new window where you can play the file and set annotations in tandem.



2. To record an annotation, play the recording and click + *start* at the beginning of the section you want to capture.

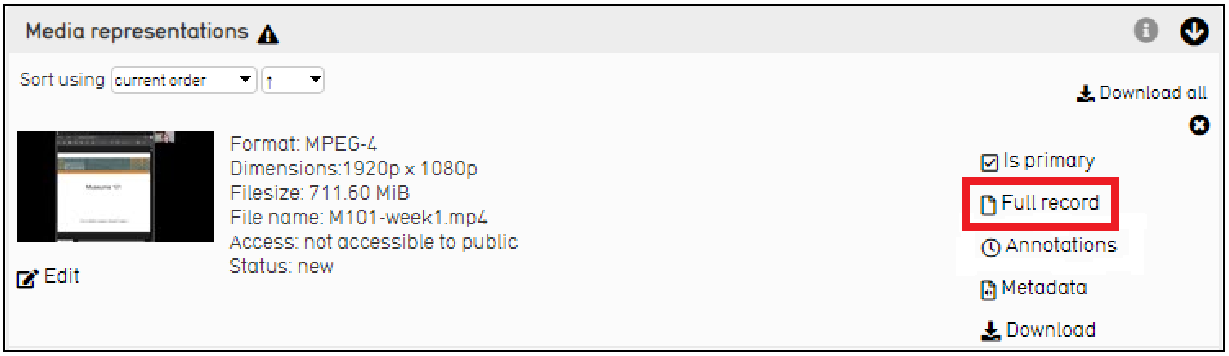


3. Click + *end* to stop capturing; this will pause the recording.
4. Add details to the annotation before continuing, including a Title, adjusting the start and end times, and/or the accessibility of the annotation (i.e., "(not) accessible to public").
5. Click *Save annotation* to finish; your annotation will appear at the top of the page.
6. Click *X Close annotations* to exit the annotations screen.

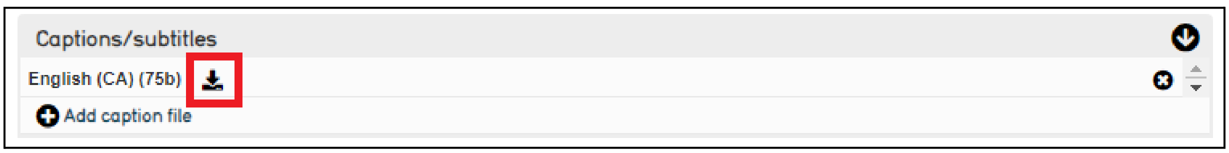
Captions/subtitles

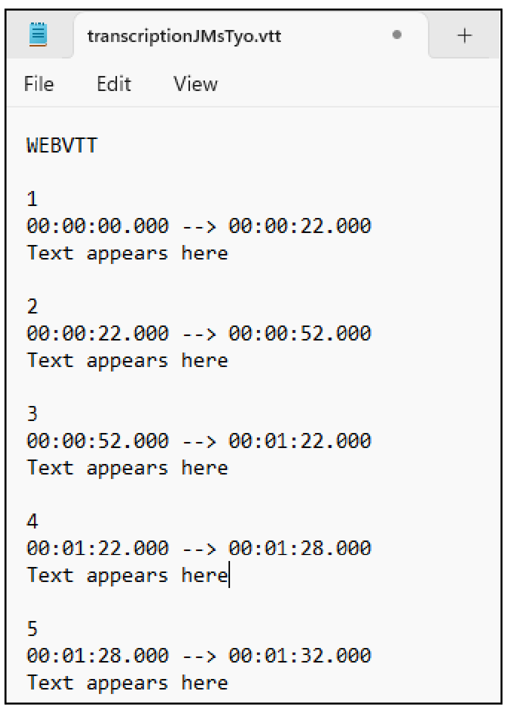
CollectiveAccess Tutorial: Using autogenerated captions on video recordings

When uploading audio and/or video files, a caption/subtitle file will automatically generate and be attached to the media's full record. Captions may take some time to generate depending on the size of the media file and the internet speed. To view the status of caption/subtitle generation, use the "Processing status" widget. Navigate back to the media representation's *Full record* to view the captions/subtitles field and download the newly generated text file.



The caption/subtitle file will appear as "English (CA) ([size of the file])" with a download button; the language in the label will be different if the caption generator detects a language other than English being spoken in the audio (for example, "French (CA)"). Download the file to read the captions/subtitles. The file will be downloaded in .vtt format; it is recommended to open the file in WordPad (if using a PC) to be able to make edits to the text if necessary and save the file in the same format (.vtt can be opened for viewing in other word processors but may not be able to be saved in the same format).





It is strongly recommended that all captions/subtitles be reviewed and edited if necessary before setting the media to be "accessible to public" to avoid publishing incorrect quotes and/or information to NovaMuse.

Here are some things to be aware of when reviewing captions/subtitles:

- Check for misspellings in all text, especially the names of people and/or places.
- Check that the language of the text is correct.
- Check that all lines and words are included (i.e., the text did not skip parts of the audio).
- Check that lines where there is no speech in the audio do not have text in the captions/subtitles.
- Check that the timestamps are correct.
- Check that punctuation and spacing are correct.
- If the audio includes music/singing, check if the text is repeating the same line that was spoken prior to or after the music/singing, if applicable.

Some factors in the audio that may cause errors in the captions/subtitles may include:

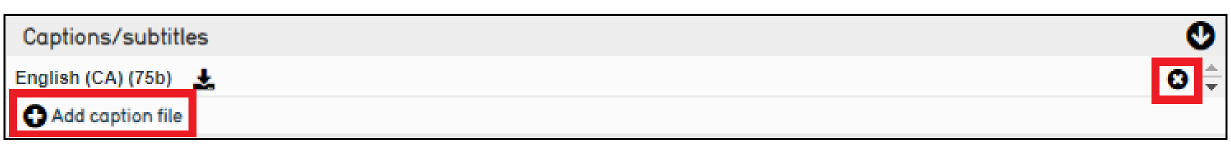
- Verbal accents, dialects, or enunciation of words
- Mumbling, disfluencies, or quiet speaking
- Multiple people speaking at once
- More than one language spoken in the same audio file
- Background noise or static
- Transitions between music/singing and speech

See the following resources for more information and guidelines on how to write/edit captions/subtitles:

- Humber College Captioning Style Guide
- Closed Captioning Standards and Protocol for Canadian English Language Television Programming Services
- Closed Captioning Best Practices - Video Accessibility Guide - Archer Library at University of Regina
- The CBC Captioning Style Guide

When editing caption/subtitle files, it is also important that the formatting of the file remains the same so that the captions/subtitles tool will be able to read the edited file and display it correctly on the video clip during play.

To upload a new or edited caption/subtitle file, delete the automatically-generated file by clicking the *X* button on the right hand side in the Captions/subtitles field. Then, click *Add caption file* to upload the new or edited file.



Condition & Treatment reports

CollectiveAccess Tutorial: Condition and Treatment Reports

Condition reports, treatment proposals, and treatment reports all contain the same fields; for the purposes of this example, we will use Condition reports:

1. Click *Add condition report* in the *Condition reports* field.
2. In the *Quick Add* screen that opens, add a *Short description* of the condition report. For reference, see the Condition Report and Glossary template on ANSM's website.
3. Type the name of the person who performed the examination or completed the condition report into the *Examiner(s)* field.
    a. If an Entity record for the person already exists, their name will appear in a dropdown menu. Select their name.
    b. If an Entity record for the person does not exist, the message "No matches found for "[name]"" will appear in the dropdown menu. You will need to create an Entity record for the examiner.
    c. To add an additional examiner, click *Add examiner* and repeat steps a - b.
    d. To remove a name, click the *x* at the right of the field.
4. Give the object a *Condition rating* by selecting its condition from the dropdown menu.
5. Enter the date the object was examined into the *Examination date* field.
6. If there are any documents or images that you want to attach to the condition report, upload them using the *Condition documentation* field.
    a. Enter the date the document/image was created/taken in *Date*.
    b. Choose the file to upload from your computer in the *Media* field.
    c. Enter a description of the document/image in the *Notes* field.
    d. To add additional documents/images to the condition report, click "Add documentation" and repeat steps a - c.
    e. To remove a document/image, click the *x* at the right of the field.
7. The *Objects examined* field will auto-populate with the accession number of the object you are adding the condition report to once the report is saved. If other objects were examined and documented on the same condition report, type their accession numbers in here.
8. Click *Add Condition report* at the top right of the *Quick Add* screen.
9. Click *Save* on the object record.

Relationships

Allows you to connect records to other objects, entities (i.e., people or organizations), historic events, loans, and/or collections.

1. Type in the accession or loan number, or name of the related object, entity, event, or collection.
    a. Objects can also be searched for by using other key descriptive words that may appear in their record(s).
2. Select the related item from the dropdown menu that appears.
    a. If no related item appears, click *Create [relation]?* or *[Relation] does not exist. Create?* to open the *Quick Add* screen.

    b. For objects, entities, collections, and loans, select the correct relationship type from the dropdown menu in the top left corner.
    c. Fill in as many fields as possible. After saving, you can open the new record to add more information in the future, if applicable.
    d. Click *Add [relation]*.
3. For objects, entities, and events, select the type of relationship to the object from the dropdown menu that appears to the right of the field.
4. To add another related item, click *Add relationship*, and repeat steps 1 - 2.
5. Click *Save*.

Alternatively, any of these relationship records can be created by selecting *New → Entity/Collection/Historic event/Loan* from the global navigation bar.

Georeferencing

CollectiveAccess Tutorial - Attaching Media and Georeferencing

This screen allows you to tag precise geographical location(s) associated with an object through a Google Maps interface, and identify how the location is related to the object.

1. Search for a location using the search bar in the top right corner of the georeference field. Searches can be for specific locations (i.e., street address or business name), or for a broader area (i.e., town, province, country).
2. If necessary, zoom in/out of the map by using your mouse's scroll or by clicking the plus and minus buttons in the top left corner of the map.
3. When you are ready to tag your location, click the *Draw a marker* button at the bottom of the menu.
4. Click the location on the map you wish to tag. Be as precise as possible. GPS coordinates for the location will appear in the row below the map.
5. Select the *Georeference type* from the dropdown menu below the map, depending on how the location is related to the object (i.e., if the object depicts the location, references the location, was made at/in the location, or was used at/in the location).
6. Click *Save*.
7. To add another georeference, click *Add Georeference* and repeat steps 1 - 6.

Summary

Several record types have a *Summary* screen available in the local navigation. The *Summary* produces a quick overview of the completed fields for a record in your chosen Display, which can be exported and downloaded as a report in Microsoft Word or PDF format by clicking the PDF button in the top right corner of the screen.

Logs

Several record types have a *Log* screen available in the local navigation. This allows you to view which accounts have made changes to records, when changes were made, and what the changes were.

Problems

Error Assessment tutorial

To view problems with data entered (e.g., missing critical information, incorrect formatting, etc.), select *Find → Objects → Browse*, then the "Problems" filter. There are several problems that the database will detect, including:

- **Acquisition method** - select the object's method of acquisition from the dropdown menu. This becomes your proof of ownership in the event of a loss of paper documentation.
- **Date should be set** - dates can be set for any object in the *Begin and End Dates* field; be as specific as possible, using information given through the acquisition process or additional research where necessary. If you cannot determine the date, use "before [the year the object entered the museum]".
- **Fonds title** - if you add the word "Fonds" in the *Fonds title* field, the database will only accept it if it is written with a lowercase f (i.e., "fonds").
- **Height of representation** - the image may be low quality/resolution and may appear blurry on NovaMuse; consider re-scanning or photographing the object.
- **Map scale ratio** - the ratio should be in the format "number:number".
- **Object name and type** - this means that the object name was duplicated into the *Object type* field. Remove the object name from the *Object type* field.
- **Object name capitalization** - capitalize all words entered in the *Object name* field.
- **Object name word count** - this means that too many words were entered in the *Object name* field. This generally indicates that nomenclature was not used to name the object.
- **Physical description word count** - this indicates that no information was entered in the *Physical description* field.
- **Set georeference type** - when adding a georeference to an object, be sure to select if the object depicts, references, was made at, or was used at the location from the dropdown menu.
- **Width of representation** - the image may be low quality/resolution and may appear blurry on NovaMuse; consider re-scanning or photographing the object.
- **You must set the access setting to "public" for these images to appear on NovaMuse.** - this means that images or other attachments will not display on NovaMuse. We understand that there are often copyright or privacy restrictions that prevent images from being published, but it's a good idea to review this "problem" to see if there is anything that can or should be made publicly accessible.

Editor alerts

CollectiveAccess Tutorial - Editor Alerts

While on an object record, if you see a yield sign at the bottom of your inspector window, this indicates that there is a problem with the data entered on the record. Hovering over this symbol will show you the problem(s) on the record. A yield sign will also appear beside the field that the problem is in.

To have the database highlight the problem field(s) for you, click *Show editor alerts* at the top of the object record. This will show you the problems on the specific screen you are on; navigate to other screens to view additional problems (if applicable).

Entity records

CollectiveAccess Tutorial - Adding an Entity

Entities are families, individuals, or organizations associated with objects in your collection. They can be related to objects as authors, cataloguers, collectors, conservators, creators, examiners, manufacturers, merchants, original owners, publishers, sources (i.e., donors), technicians, or in general.

Entities can be added by selecting *New → Entity* in the global navigation bar, or by typing a name into a field on the *Relationships* tab of a record and using the *Quick Add* screen. Entities can later be accessed by clicking their hyperlinks, or selecting an option under *Find → Entity.*

When adding new entities, do not enter multiple names (e.g., Bob & Barb Smith) on one record. Each individual should have their own record, and then the records can be linked using the *Relationships* tab.

Screens

- **Basic Info**
    1. **Preferred labels** - record the name of the entity in the forename, middle name, and/or surname fields; the database will autogenerate a display name after saving, which can be edited if needed.
    2. **Lifetime** - record the lifetime of the entity in dates, if known. The date can be recorded as "before [year]" or "after [year]" to narrow down the date range if unknown.
    3. **Sex** (Individual records only) - record the sex/gender of the individual, or select "Unknown".
    4. **Nationality** (Individual records only) - record the nationality of the individual, if known.
    5. **Description** - record a short biography of the entity.
    6. **Source of description** - provide references to where information written in the description was found.
    7. **Brand names** (Organization records only) - click *Add brand name* and type in the brand used, if known/applicable.
    8. **Date founded** (Organization records only) - record the date the organization was founded, if known.

9. **Date incorporated** (Organization records only) - record the date the organization was incorporated, if known/applicable.
10. **Date of liquidation** (Organization records only) - record the date the organization was liquidated, if known/applicable.
11. **Notes (internal use only)** - record any additional notes. Information in this field must not be shared with the public.

- **Alternate Names** - to add an alternate name (i.e., a maiden name), use this page. Enter the Preferred labels for the alternate name, then select "alternate" or "use for" from the *Type* dropdown menu, and the *Effective date* if known.
- **Contact Info** - record contact information, including the address, telephone/fax number, and/or email for the entity, if known.
- **Relationships** - see Relationships screen.
- **Links** - enter the URL and a description of any external links related to the entity.
- **Summary** - see Summary screen.
- **Log** - see Log screen.

Collection records

There are two types of collection records available: archival and administrative. These records can be created to group together objects that arrived at the museum as a collection (i.e., archival collections), or if they are grouped for museum administrative purposes (i.e., a working or teaching collection).

Collections can be added by selecting *New → Collection* in the global navigation bar, or by typing a name into the *Related collections* field on the *Relationships* tab of a record and using the *Quick Add* screen. Select either *Administrative collection* or *Archival collection*. A blank Collection record will open.

Screens

- **Basic Info**
    1. **Names** - assign a name to the collection (e.g., "John Doe Collection", "Jane Doe Fonds", "Teaching Collection", etc.)
    2. **Collection identifier** - assign a unique identifier (i.e., alphanumeric code) to the collection.
    3. **Status** - select the completion status of the record from the dropdown menu.
- **Alternate Names** - allows you to assign an alternate name to the collection.
- **Relationships** - see Relationships.

Historic Event records

Screens

- **Basic Info**
    1. **Title** - assign a title to the event (e.g., "Halifax Explosion", "Second World War", etc.
    2. **Identifier** - assign a unique identifier (i.e., alphanumeric code) to the event.
    3. **Description** - provide a brief description of the event.

4. **Status** - select the completion status of the record from the dropdown menu.
- **Alternate Names** - allows you to assign an alternate name to the event.
- **Relationships** - see Relationships.
- **Links** - enter the URL and a description of any external links related to the event.
- **Summary** - see Summary screen.
- **Log** - see Log screen.

Storage Locations

CollectiveAccess Tutorial - Storage Locations

Storage locations are recorded in a hierarchical format, which means you can define buildings, rooms within those buildings, and units within those rooms. The hierarchy can extend to be as detailed and/or deep as needed (i.e., rooms can be created within rooms, units can be created within units).

Screens

- **Basic Info**
    1. **Name** - assign a name to the location (e.g., "[Museum name]", "Storage Room A", "Shelf 5", "Box 4", etc.).
    2. **Description** - provide a brief description of the location.
    3. **Location identifier** - assign a unique identifier (e.g., alphanumeric code) to the location.
    4. **Status** - select the completion status of the record from the dropdown menu.
- **Location** - displays the location's position in the overall storage location hierarchy. Click *Show Hierarchy* in the *Location in hierarchy* field to view more, and open the *Explore*, *Move*, and *Add* tabs.
- **Contents** - lists the objects associated with the location. Note: this does not display objects associated with the location's sub-units (i.e., if Storage Room A contains Shelf 5, only objects assigned to Storage Room A will display, not objects within its Shelves).
    - **Add relationships** - objects can be added to the location here rather than from the object's record
- **Alternate Names** - allows you to assign an alternate name to the location.
- **Summary** - see Summary screen.
- **Log** - see Log screen.

Adding Storage Locations

From Global Navigation Bar

1. Go to *New → Storage location*.
2. Browse where to add the new location by clicking through the hierarchy, or searching for the parent location in the *Search* field.
    a. If using the hierarchy, click on the arrow beside "Storage locations", then continue clicking through arrows until you find the parent location.
        i. Once the parent location is found, click on iits name to select the location.

    b. If using the *Search* field, type in the parent location and wait for it to appear in the dropdown menu, then click on it.
3. Select the type of location (Permanent Building, Permanent room, or Permanent unit) to add from the "Add under new" dropdown menu.
4. Click the + button beside the dropdown menu.
5. The *Basic Info* screen for a new Permanent location will open. Complete the fields as described above, and click *Save*.

From *Location in hierarchy*

1. From the location record for the parent location, open the *Location* screen.
2. Click *Show hierarchy* in the *Location in hierarchy* field.
    a. The parent location name should then be in **bold**.
3. Click the *Add* tab.
4. Select the type of location (Permanent Building, Permanent room, or Permanent unit) to add from the "Add a new" dropdown menu.
5. Click the + button beside the dropdown menu.
6. The *Basic Info* screen for a new Permanent location will open. Complete the fields as described above, and click *Save*.

From an object record

1. Locate the *Related storage locations* field on the *Basic Info* screen.
2. Type the name of the new location into the field.
    a. If the field already has a location listed, click *Add storage location* to open a blank field.
3. Click "Create [location name]?" from the dropdown menu that appears. This will open the Quick Add screen.
4. Select the type of location (Permanent Building, Permanent room, or Permanent unit) to add from the dropdown menu at the top of the screen.
5. Select the position of the location by browsing through the hierarchy using the arrows.
6. Enter a description and location identifier.
7. Click + *Add Permanent [location type]*.
8. Click *Save* on the object record.

Moving Storage Locations

1. Open the record for the location you want to move.
2. Navigate to the *Location* screen.
3. In the *Location in hierarchy* field, click *Move*.
4. Navigate through the location hierarchy by clicking the arrows, or search for the location you want to move the current location under.
5. Click on the location you want to move your current location under. It should now be bolded. A pop up message saying "Will be moved under [storage location] after next save" will appear to confirm where you are moving the location.
6. Click *Save*.

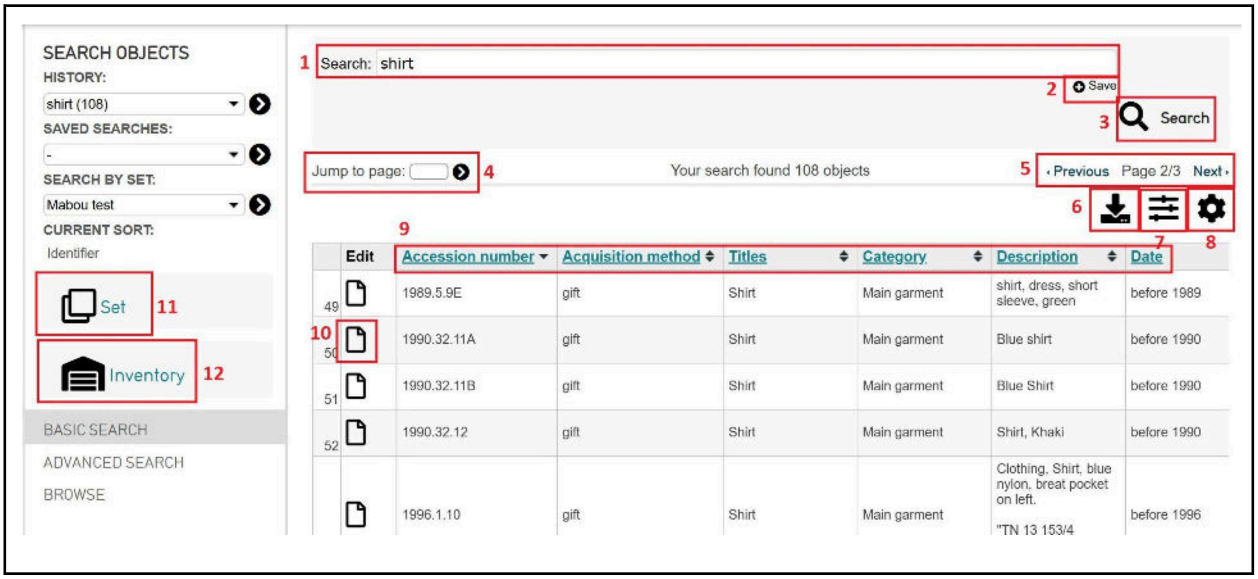
Loans

Loans can be 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.

Finding Records

CollectiveAccess Tutorial - Finding Objects

The easiest way to search for a record is to use the search bar in the top right corner of the global navigation bar, using accession numbers, object names, or keywords. Records can also be found using the *Find* menu, selecting the type of record you are looking for, and then clicking on either: Basic search, Advanced search, or Browse.



1. **Search field** - enter keywords or accession numbers here.
2. **Save Search button** - click to save the results of the search. Saved searches can be accessed from the *Saved searches* dropdown menu on the left-hand side of the page, or in [Manage → My search tools](#).
3. **Search button** - search for the information entered in the Search field.
4. **"Jump to Page" navigation** - move to a specific page of the search results.
5. **Page browsing** - move from page to page of search results.
6. **Export tools** - download the results of your search.
7. **Refine results** - filter search results by the different fields of an object record. Results can be refined more than once to create more customized search results.
8. **Display options** - change how search results are displayed from a number of custom or pre-configured display options. For more information, see [My displays](#).
9. **Sort results** - click on a heading to sort the search results by that field.
10. **Edit Record button** - opens the selected object record.
11. **Set tools** - create a new set from your search results, or add items to an existing set. "Add all" adds all search results to the chosen set, while "Add checked" adds

items selected via checkbox, and “Add random” selects random objects from the search results to add. “Create set” allows users to create a set after choosing items and then assigning a name to the set. For more information, see My sets.

12. **Inventory tools -** create a new inventory from your search results, or add items to an existing inventory. “Add all” adds all search results to the chosen inventory, while “Add checked” adds items selected via checkbox, and “Add random” selects random objects from the search results to add. “Create inventory” allows users to create an inventory after choosing items and then assigning a name to the inventory. The “Exclude inventoried” box will exclude any objects from the search results that have been inventoried in the past 2 years. For more information, see Inventories.

Basic Search

Allows you to search for records by keyword. It searches across all fields in the record; for example, if you are searching for object records with the word “chair”, it will not only return objects that are chairs, but also those which mention the word “chair” anywhere in their record.

After performing a search, you can save your search terms by clicking *Save* in the bottom right corner of the *Search* bar at the top of the results page. A pop-up will appear to confirm that your search was saved.

Advanced Search

CollectiveAccess Tutorial: Advanced Searches

Allows you to search for records by narrowing your search using stricter criteria, or by using a pre-made search form. Each record type has its own set of search form criteria, according to fields that appear on the record type. For example, if you use advanced search to search for “chair”, you can also specify that the record should be an “artifact” record, and “accessible to public” to narrow your results.

To save your search terms, type a name of the saved search into the *Save search as* field at the bottom of the search form. Then, click the arrow button beside the field. A pop-up will appear to confirm that your search was saved.

Browse

Allows you to browse all records of a particular type (i.e., object, entity, collection, etc.) and narrow your search using filters. Filters are related to fields that appear on the record. All record types allow you to browse by *Types*, *Statuses*, and *Access Statuses*, while object records can be browsed by many more filters.

Export search results

1. After completing a search, click the *Export Tools* button.
2. Ensure that your search results are shown in your desired display.
3. From the *Download results using* dropdown menu, select the format in which to export your results.

4. Check any boxes of items you would like included in your report (i.e., logo, result count, current date, etc.)
5. Click the arrow beside the dropdown menu.
    a. Your search results will download to your computer.
6. Click the button in the bottom right corner (straight line) to collapse the *Export Tools* screen.

Search tips

CollectiveAccess Tutorial - Progress Reports

- Search “*” to show all records in the database.
- Add an asterisk (“*”) to the end of any letter combination to find all results starting with those letters. For example, searching for *farm** will give you results for farms, farming, farmed, etc.
- To search for records within a specific range of dates, use the following keywords:
    - **created: “before/after [month] [day] YYYY”** - search for all records created after the listed day/month/year. For example, *created: “after july 15 2024”*.
        - *created: "April 12 2025”* will display all records created on April 12, 2025.
        - *created: "April 2025”* will display all records created during April 2025.
        - *created: “after July 15 2024”* will display all records created after July 15, 2025.
    - **created.[username]: “before/after [month] [day] YYYY”** - search for all records created by a specific user in a specific date range. For example:
        - *created.student1: 2025* will display all records created by user student1 in 2025.
        - *created.student1: “after July 15 2025”* will display all records created by user student1 after July 15, 2025.
    - **modified: “[month] [day] YYYY”** - search for all records modified on a certain date. For example:
        - *modified: "April 12 2025”* will display all records created on April 12, 2025.
        - *modified: "April 2025”* will display all records created during April 2025.
        - *modified: “after July 15 2024”* will display all records modified after July 15, 2024.
    - **modified.[username]: “before/after [month] [day] YYYY”** - search for all records modified by a specific user in a specific date range. For example:
        - *modified.student1: 2025* will display all records created by user student1 in 2025.
        - *modified.student1: “after July 15 2025”* will display all records created by user student1 after July 15, 2025.
- Contact ANSM staff for assistance with searching for more specific results, such as results from within a certain field only.

Manage

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, and setting preferences for how you would like the system to operate.

My preferences

The primary preferences you may consider customizing include the following. Contact ANSM staff for information about other preference options.

1. General
    a. **User interface locale -** change the language in which you use CollectiveAccess. Select “français (Canada)” to use the database in French.
    b. **Show current location as 'breadcrumb' trail** - if set to “yes”, the path of menu options taken to reach the current screen will be displayed at the top of every screen.
    c. **Autoclear previous Quicksearch** - determines if the previous Quicksearch terms clear automatically when a new search is performed, or if the search terms remain editable for the next search.
    d. **Remember last search or browse** - determines if the last performed search, basic or advanced, or browse is retained after navigation away from results display.
    e. **Auto-delete old sets? -** automatically remove sets older than the specified age threshold.
    f. **Auto-delete setting default for new sets -** set newly created sets to auto-delete.
    g. **Auto-delete sets older than (days) -** age, in days, after which set should be deleted when auto-deletion of sets is enabled.
    h. **Auto-delete set age mode** - method used to calculate age of set. Age may be calculated as the number of days since the set was created, or the number of days since the set was last edited or used in a search or for a report.
2. Editing
    a. **Default cataloguing locale** - set default language when entering data in certain fields (i.e., if set to French, all fields where you have the option to change the language from English to French will automatically be set to French).
3. Units of measurement
    a. **Display measurements in** - determines units used to display measured quantities. Select “units as entered” to display measurements in the form in which they were entered into the system (i.e., if this is set to “metric units”, measurements have been entered in inches, the database will automatically convert them to cm).
4. Inventory
    a. **Preset inventory fields? -** selects which fields should be preset when recording inventory. Values will be copied from the nearest previously inventoried item.
5. Search builder - allows you to drag and drop your preferred options to include in the *frequently used* list of the search builder for each of the record types.

My watched Items

View and delete items from the Watched Items list. Items are added to the watched items list by clicking on the eye icon in the record’s inspector window.

My project teams

Allows you to create access-restricted projects for users of your database. These teams can collaborate on Displays, Searches, and Sets.

My displays

Displays can be used to view search results in different ways. Each display contains data from different fields from records, allowing you to generate detailed and customized reports.

Pre-Configured Displays

The following displays come pre-configured with the system:

1. **Full Report (Artifact and Archival)** - best used on the summary page of the object in question. Shows all 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.
2. **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.
3. **Location Report** - best used with the results of a search. Shows the object accession number, name, type, sub-type and location.
4. **Condition Report** - also used with searches. Shows object accession number, name, location, initial condition and condition remarks.
5. **Research Report** - shows object accession number, name, type, location, title, relevant dates, author or maker, and description.
6. **Entity Report** - used with entity searches and worksheets. Displays all the objects that an entity is associated with and the nature of the relationship (i.e. source, author).

Creating Displays

CollectiveAccess Tutorial - Creating a Display

1. Select *Manage → My displays.*
2. From the *New display for* dropdown menu, select “objects”.
3. Click the + button.
4. Assign a name in the *Display List Name* field.

5. Assign an alphanumeric code in the *Display Code* field.
6. If you would like other database users to be able to use your display, assign access by clicking *Add group access*, then typing "cataloguers" or "students" into the *Group* field.
7. Click *Save*.
8. Navigate to the *Display List* screen.
9. Drag and drop the fields you would like to appear in your display from the *Available information* column to the *Information to display* column. The order in which you drop the field names is the order that they will appear when using the display. You can rearrange the order of the fields by dragging them around inside the column.
10. When you are finished, click *Save*.

My sets

Sets are informal and not intended to be collections-level groupings. Sets are created for practical or administrative purposes rather than representing a formal grouping within your collection.

Creating Sets

CollectiveAccess Tutorial: Creating and Using Sets

From *Manage*

1. Select *Manage → My sets → All sets.*
2. From the *Create new* dropdown menu, select "User set".
3. From the *containing* dropdown menu, select the type of records to include in the set.
4. Click the + button.
5. Assign a name in the *Set Title* field.
6. Assign an alphanumeric code in the *Set Code* field.
7. Describe the set in the *Introduction* field. If the set is to be used on the public website, this serves as an introduction.
8. *Access* field - setting this to "accessible to public" will show the set on the Featured Galleries page of NovaMuse.
9. If you would like other database users to be able to use your set, assign access by clicking *Add group access*, then typing "cataloguers" or "students" into the *Group* field.
10. Click *Save*.
11. Navigate to the *Items* screen.
12. Enter an accession number or name of an object (if the set was created for objects) into the *Add object* field, then select the desired object to add to the set from the dropdown menu.
    a. Continue adding as many objects as desired by repeating this step.

From search results

1. Conduct a search to find the (initial) records to add to your set.
2. Click *Set* on the left side of the search results screen.
3. From the *Add to set* dropdown menu, select one of the following options:
    a. Add all - adds all search results to the set.

    b. Add checked - click the check boxes beside the desired objects to add to the set from the search results to include them using this option.
    c. Add random - this will trigger the *Limit to x objects* option to appear. Enter the desired number of objects to include in the set from the search results for the database to randomly select for inclusion.
4. To add records to an existing set, select the name of the set from the second dropdown menu.
5. To add records to a new set, click *Create set*.
    a. Enter the name of the new set in the *New set name* field.
6. Click *Save*.

Inventories

CollectiveAccess Tutorial: Using the Inventory tool in CollectiveAccess

Create inventory containing random objects

1. Select *Manage → Inventories.*
2. Click on the plus button to the right of “Create new **inventory** containing objects”.
3. After creating an inventory, the set up (Basic Info) screen will open.
    a. Assign an *Inventory Title* to the inventory. An *Inventory Code* will automatically generate upon saving.
    b. Write a description of the inventory in the *Description* field.
    c. If you would like other database users to be able to view and edit the inventory you’ve created, assign *Group Access*.
        i. Click *Add group access*.
        ii. Type “Inventory” into the *Group* field.
        iii. Select “can read”, or “can edit” from the dropdown menu on the right, depending on the permissions/restrictions you want to set for the group.
        iv. Type the date range of how long the permissions/restrictions will apply into the date field, if applicable. Leaving this blank will allow for unlimited access.
        v. **Note:** In order for other users to view inventories they did not create themselves, their accounts must be assigned to the “Inventory” group. Please contact ANSM staff with the name(s) of the user(s) you’d like to be assigned to the Inventory group.
    d. Click *Save*.
4. The inventory record will now open to the *Basic Info* screen.
5. To add objects to the inventory, click the crossing arrows icon on the lefthand side of the page.
    a. The *Add random to inventory* pop-up window will appear. The default number of objects that will appear in the inventory is 100; you can change this by erasing 100 and typing in the desired number of objects to inventory.
    b. Click the + *Add* button.

        i. The inspector window will automatically refresh to reflect the change in the count of objects added to the inventory.
    c. You can add more random objects if necessary by repeating the above steps; note that this will add to the total count of objects, not replace the existing ones in the inventory list.
6. You can also add more specific objects to the inventory list on the *Inventory* screen.
    a. Note: If you try to add objects to the inventory list while on the Inventory tab using the *Add random objects* button, they will not appear right away - you will need to refresh your page to see the objects added.
    b. Add objects by accession number by typing them into the *Add to inventory* field and selecting them from the dropdown menu that appears. They will appear at the bottom of the list.
    c. Click *Save*. The database will remind you to click save before you leave the page if you do not.

Create inventory containing select objects

1. Go to *Find → Objects → Browse.*
2. Browse the filters to select which objects you want to include in your inventory. There are many options and this is highly customizable.
3. Once the desired filters are selected, click the Inventory button in the top-left of the screen.
4. From the *Add to inventory* options, select either "Add all", "Add checked", or "Add random" from the first dropdown menu. This may depend on the number of objects in your search results; if there are hundreds or thousands of objects, you may want to select a smaller number to add to the inventory.
5. From the second dropdown menu, select an existing inventory name if you have already created one, or click *Create inventory* under the dropdown menu..
    a. If you choose to create an inventory, enter the name of the new inventory into the field. You can also go back to the dropdown menu by clicking *Choose inventory*.
6. Keep the "Exclude inventoried" option checked to exclude objects that have been recently inventoried (i.e., within the past 2 years).
7. Click *Save*.
    a. A pop-up will appear that will tell you how many objects were added to the inventory, and how many were excluded due to having been previously inventoried.
8. Access the new inventory by:
    a. Going to *Manage → Inventories*, and selecting the inventory from the list.
    b. Refreshing the page and then clicking on the inventory name.
    c. Clicking the inventory name in the inspector window.

Create inventory from an object record

1. Access the record of an object you wish to include in an inventory.
2. Go to the *Administrative* screen.

3. In the *Inventory history* field, begin typing the name of the new inventory into the blank field, or click *Add to inventory* first to open a new blank field if the object has already been inventoried.
    a. Click the "[inventory name]" does not exist. Create?" message that appears in the dropdown menu.
4. The *Quick Add Inventory* screen will open. Fill in the details and click + *Add Inventory*.
    a. A pop-up message will appear to confirm that the inventory has been created.
5. Click *Save*. The inventory name will now appear in the *Inventory history* field.
6. Access the new inventory by:
    a. Going to *Manage* → *Inventories*, and selecting the inventory from the list.
    b. Refreshing the page and then clicking on the inventory name.
7. You can also edit the object's relationship to the inventory from the *Inventory history* field.
    a. Click on the paperclip icon to edit the object's inventory information.
    b. See Conducting an Inventory for further instructions.
8. To remove an object from an inventory, click the *x* beside the inventory name in the *Inventory history* field.
    a. Click *Save*.

Conducting an Inventory

1. Click the *Inventory* tab to view the contents of the inventory (i.e., object list).
    a. Use the *Sort* dropdown menu to sort the list by Accession number, Title, or Date (i.e., date of object).
    b. Use the *Filter* search bar to type in a keyword to search for objects from within the inventory list.
2. From here, you can carry your laptop/mobile device through the museum as you (attempt to) locate the objects in the list.
    a. Click the question mark (?) button beside an object to open its inventory options.
    b. Select if the object was "Found" or "Not found" from the dropdown menu in the *Object Found?* field.
    c. In the *Date* field, click the current date from the calendar that appears, or type in the date.
    d. Enter the name of the person who conducted the search for the object in the *Inventoried By* field, and select their name from the dropdown menu.
        i. If no name appears, click "Create [name]?" and fill in the *Quick Add Entity* screen to create a new Entity record for that individual.
    e. Enter any additional important/useful information in the *Notes* field.
    f. Click *Done*.
3. After making any changes to an object's inventory information, an "Unsaved changes" alert will appear in the top right of the inventory list. This is to remind you to save the page before you leave.
    a. The list number will also highlight in red to show you which record(s) has/have the unsaved changes.

4. The header in the *Inventory contents* field will also update once objects have been inventoried so that the number of *Found* and *Not checked* objects will reflect changes made. Click on any of these terms to filter the content list to show you a selection of objects. Click *All* to return to the full inventory list.

Editing an object record from within an Inventory

1. Click the title of the object to open its record.
2. This will open the object record, from within the inventory list. This allows you to make any changes to the record as you normally would, in order to address any problems, and update or fill in fields as needed.
3. Once changes have been made, you can either:
    a. Click *Save* to save changes and stay on the object record within the inventory list.
    b. Click *Save and return* to save changes and return to the main inventory list.
        i. When you return to the inventory list, your last position in the list will be automatically saved.
4. You have the option of going directly to the next object record in the inventory list to review its record by clicking the arrows in the *Results* section of the inspector window.
    a. To return to the full inventory list without making any changes, click *Results*.

Inventory reports

1. To view/print a PDF report of the inventory, click the PDF button in the top right corner of *Inventory contents*.
    a. Select the type of display you want the object list to appear as from the *Download* dropdown menu.
    b. Select either “PDF” or “PDF (checklist)” in the *Format* dropdown menu.
    c. Check/uncheck the boxes of any additional options you’d like to appear in your report (“Include logo?”, “Include page numbers”?, etc.).
    d. Click *Download*.
2. Use the *Log* screen to view changes made to the inventory, including the date and by which user.

My search tools

Search Forms

Allows you to create advanced search forms for each of the record types. To create a new search form:

1. From the *New search form for* dropdown menu, select the record type for which to create the search form.
2. Click the + button beside the dropdown menu.
3. Type in a name for your search form in the *Form name* field.

4. In the *Search form contents* field, drag and drop the fields you want to include in your search form from the *Available search items* column to the *Items to search* column.
5. The *Search form settings* suggest a default of 3 columns in the search form; this means the template will display the search form fields in 3 columns.
6. If you would like other database users to be able to use your search form, assign access by clicking *Add user access*, then typing in the username of the person in the *User* field.
7. If you would like a group of users to be able to use your search form, assign access by clicking *Add group access*, then typing in the name of the group (e.g., "cataloguers", "students") in the *Group* field.
8. Click *Save*.

Saved searches

This screen displays search terms that have been saved from either a Basic Search or an Advanced Search.

1. Click on the search term to view the results.
2. To delete a saved search, check the box to the right of the search term, then click *Delete selected*.

My downloads

If you are exporting a report in the background for a large data set, it will appear here once it is finished generating. The report can then be downloaded to your computer.

Logs

CollectiveAccess Tutorial - Using the Change Log

Allows you to monitor which accounts have been logging into the database and any changes to records for a selected date range.

1. From the *Show* dropdown menu, select an option for the type of changes made to a record.
2. From the *to* dropdown menu, select the type of record.
3. In the *from* field, enter a date range for when the changes were made (e.g., "July 2025", "April - June 2025", "2024", etc.).
4. From the *by* dropdown menu, select the user who made the changes.

Statistics

CollectiveAccess Tutorial - Managing Statistics

Allows you to monitor overall statistics for records in the database, including accessibility, types of records, types of changes made, media, and which users are logging in.

Help

CollectiveAccess Tutorial - Help Menu

- **Frequently Asked Questions (FAQ)** - answers questions regarding documentation standards, digitization, searching, and work flow.
- **Helpful Resources** - provides links to resources from the Association of Nova Scotia Museums (ANSM), and other resources.
- **Contact ANSM for Support** - provides contact information for ANSM staff who can respond to questions about CollectiveAccess.

Resources

- Canadian Users Group - CollectiveAccess
- Collections & Access resources and templates on ANSM website
- CollectiveAccess tutorials
- Nomenclature for Museum Cataloging
- NovaMuse
- Nova Scotia Subject Headings Authority