

Collective Access Procedural Manual



CLHO: Wilton Historical Society

Created March 10, 2018

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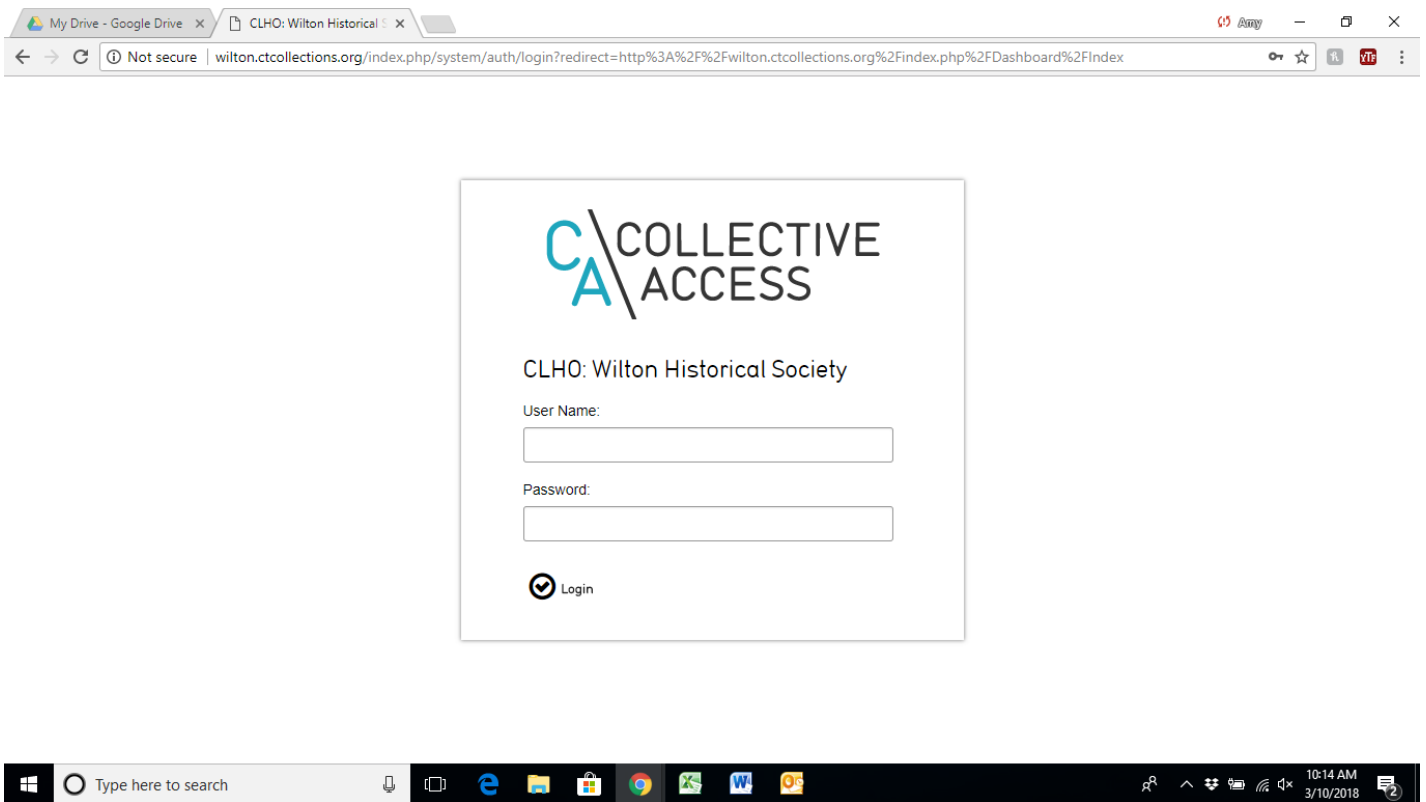
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Login

To log into the Wilton Historical Society’s “Collective Access” Database, open a web browser (Chrome, Microsoft Edge, Firefox, etc.) and go to the website:

wilton.ctcollections.org

That should bring you to a page that looks like this:



The image shows a screenshot of a web browser window. The address bar displays the URL: wilton.ctcollections.org/index.php/system/auth/login?redirect=http%3A%2F%2Fwilton.ctcollections.org%2Findex.php%2FDashboard%2FIndex. The page content features the logo for "COLLECTIVE ACCESS" with a stylized "CA" in blue and black. Below the logo, the text "CLHO: Wilton Historical Society" is displayed. There are two input fields: "User Name:" and "Password:". At the bottom left of the form area, there is a "Login" button with a checkmark icon. The browser's taskbar at the bottom shows the Windows logo, a search bar, and various application icons. The system tray on the right indicates the time as 10:14 AM on 3/10/2018.

On this page, enter your username and password, and click login

That should bring you to a page that looks similar to the page below:

The screenshot shows the CollectiveAccess dashboard homepage. At the top, there is a navigation bar with the logo and menu items: NEW, FIND, MANAGE, IMPORT. Below this is a search bar. The main content area is divided into several sections:

- Advanced search form:** Contains fields for Title, Object identifier (set to 2018), Related Entities (set to blackmar), Curatorial Description, Dates, Type, and Object status. There are search and reset buttons.
- Recent logins:** A table showing login activity:

Date/time	User	IP address
3/10/18, 10:44AM EST	Nick Foster (Nfoster)	148.75.114.228
3/09/18, 2:29PM EST	Nick Foster (nfoster)	75.127.174.218
- Notifications:** A message stating "You have no new notifications".
- Recent changes:** A section titled "Changes to objects from March 9 – March 10 2018" listing two entries: "Nick Foster edited Wilton Farmers Baseball Team Photograph" on March 9 2018 at 15:51:54, with a "More Info" link.

At the bottom of the page, a dark navigation bar displays the user's name "User: Nick Foster", a "Preferences" link, and a "Logout" link. The footer also includes copyright information: "© 2018 Whirl-I-Gig, CollectiveAccess is a trademark of Whirl-I-Gig [0.4824s/10.00M]".

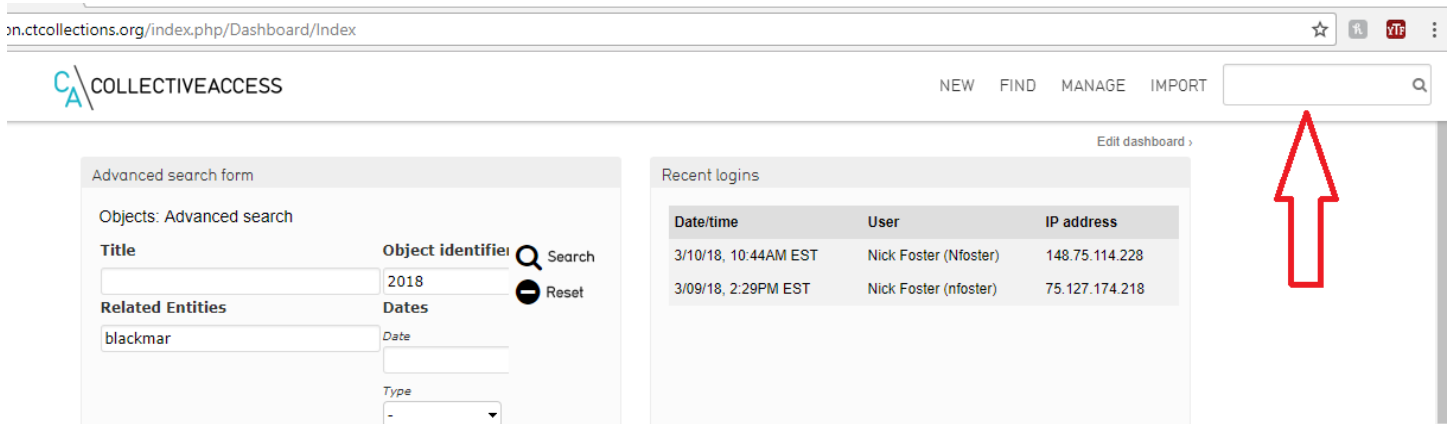
This is the homepage. If you go to wilton.ctcollections.org and it brings you to this page without having to login, make sure that you are logged in as the appropriate person. You can tell who is logged in at the bottom of the screen. If the name that appears is not you, click “Logout” and that will take you back to the login screen.

This annotated screenshot highlights the 'Logout' link in the bottom navigation bar. Two large white arrows point from the 'Notifications' and 'Recent changes' sections down to the 'Logout' link, indicating that clicking this link will take the user back to the login screen.

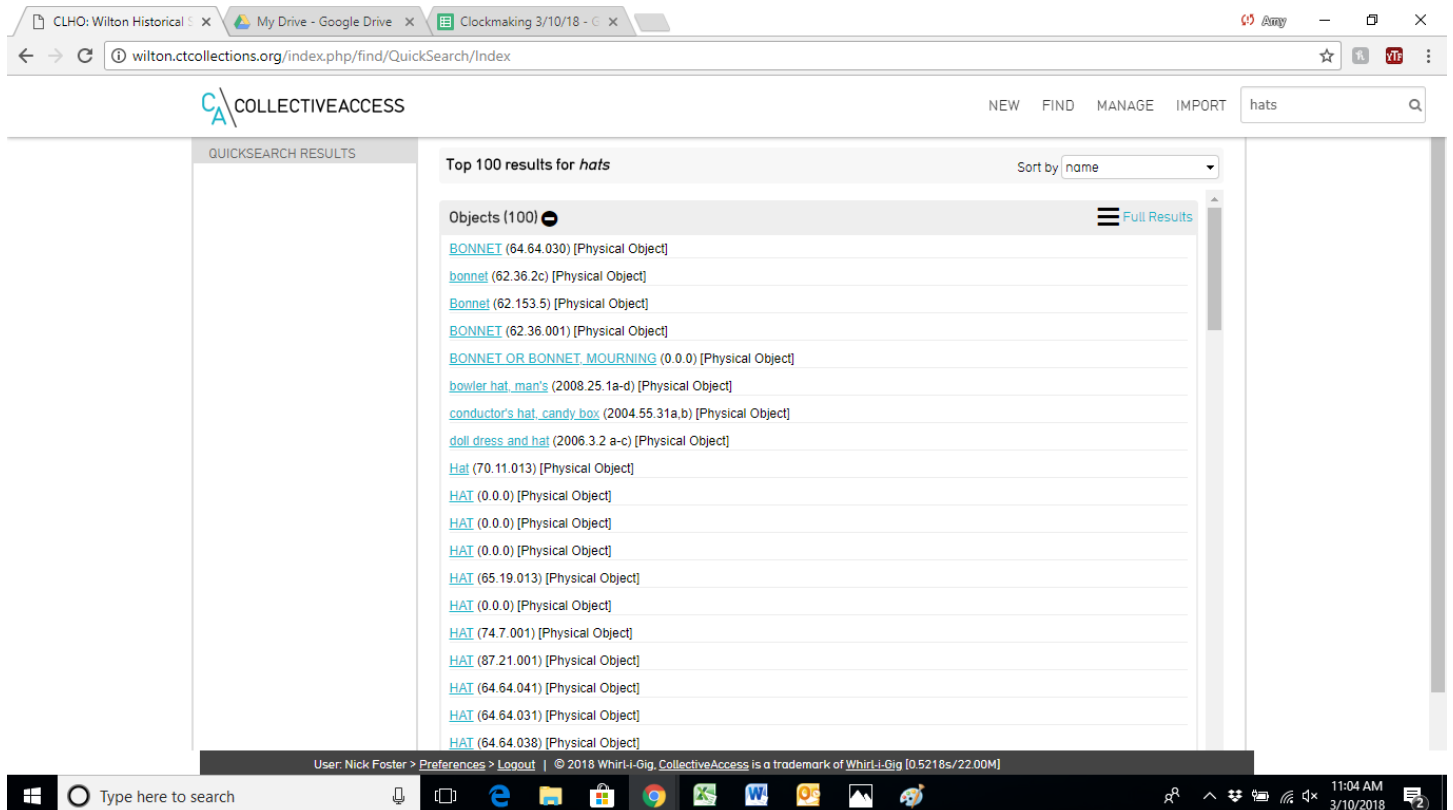
Searching for an Object

Searching for an object can be done in two ways.

First, you can use the basic search bar, located at the top right of the homepage:



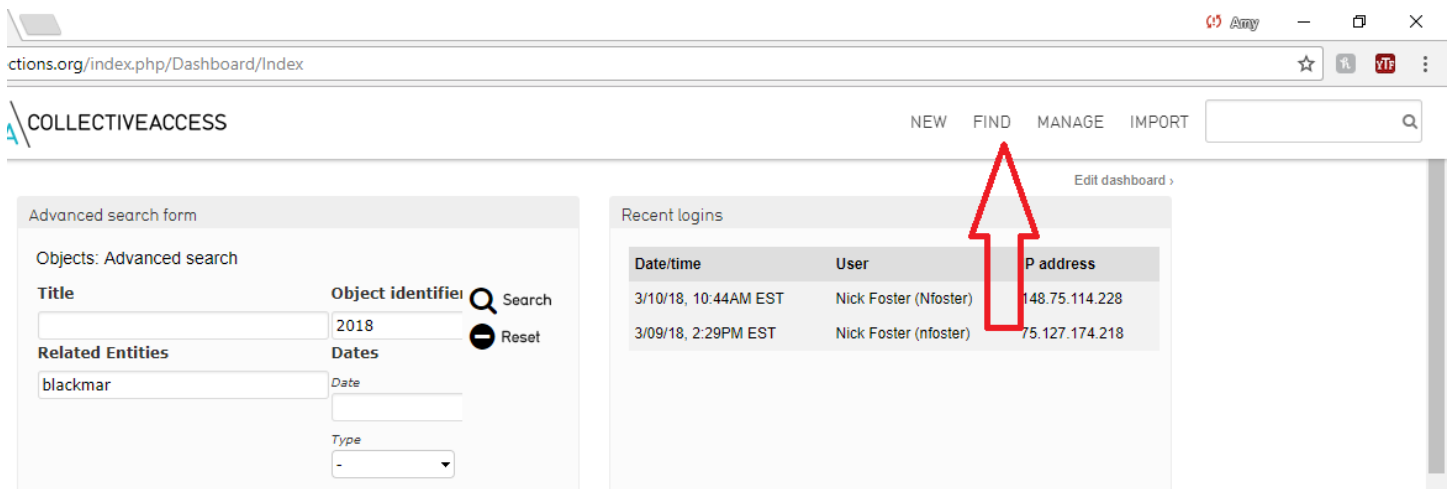
You can enter an accession number, donor name, keyword, etc. into this box and press enter, and it will bring you a results list that looks something like this:



This example search was for “hats”, which brings up over 100 objects. If you put in something more specific, like a donor name or an accession number, there will be fewer results.

Clicking on any of the objects, highlighted in blue, will bring you to that objects page.

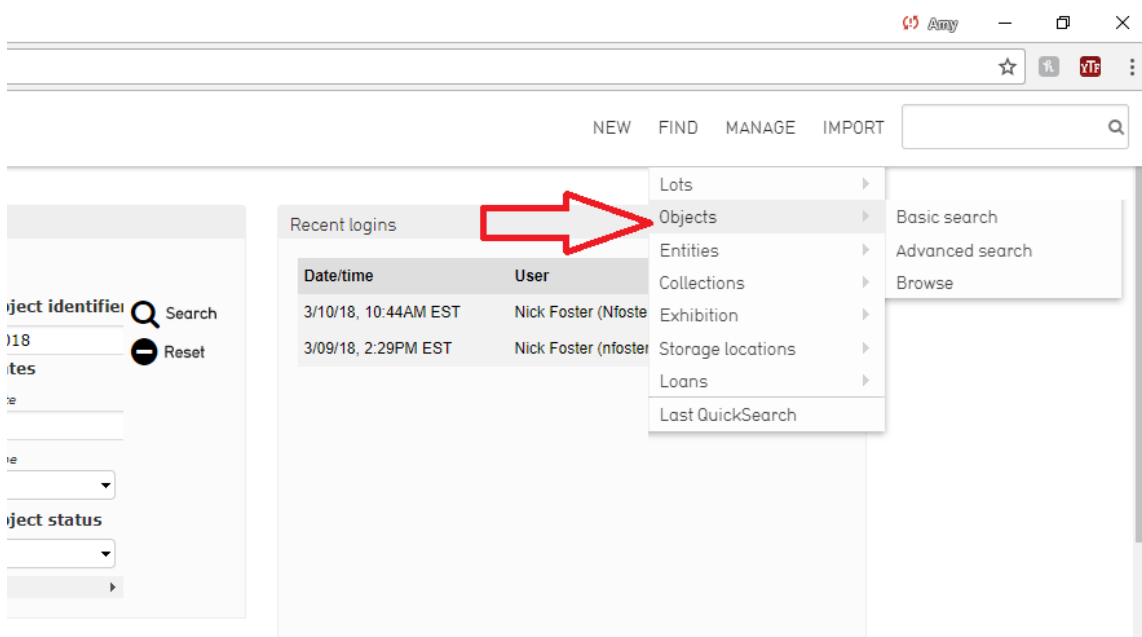
The second way to search for an object is using the “Find” menu, which is also at the top of the home page screen:



The screenshot shows the CollectiveAccess dashboard. At the top, there is a navigation bar with the following items: COLLECTIVEACCESS, NEW, FIND, MANAGE, IMPORT, and a search box. A red arrow points to the 'FIND' menu item. Below the navigation bar, there are two main sections: 'Advanced search form' on the left and 'Recent logins' on the right. The 'Advanced search form' includes fields for 'Title', 'Object identifier' (with a search icon and 'Search' button), 'Related Entities', 'Dates', and 'Type'. The 'Recent logins' section contains a table with the following data:

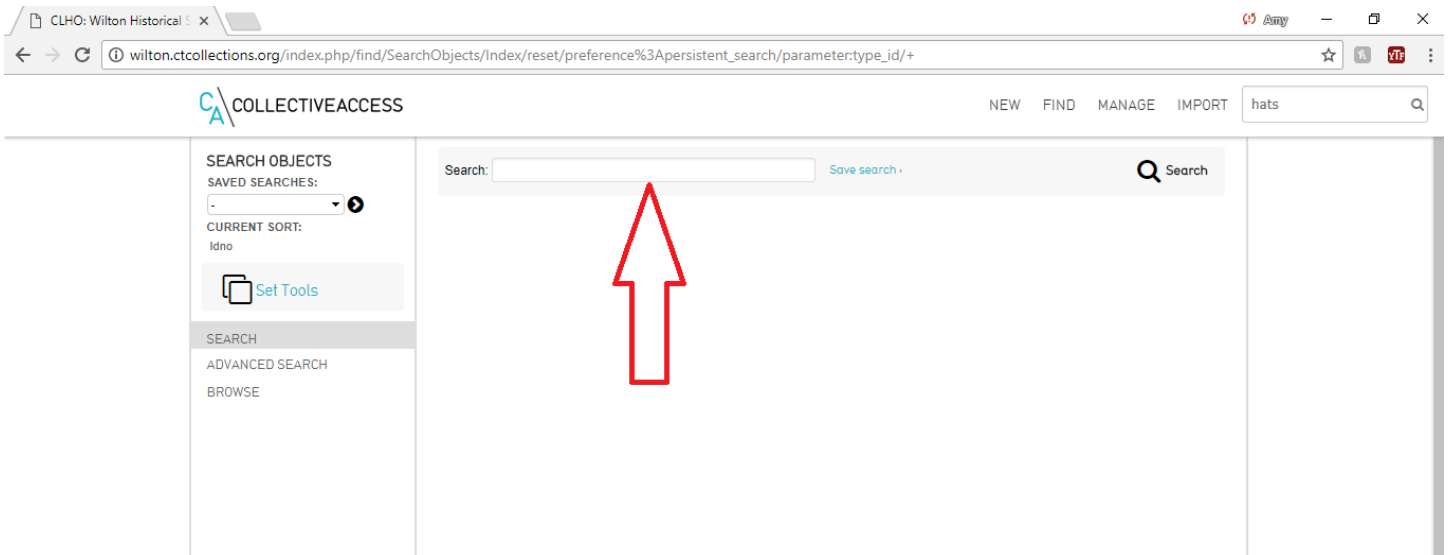
Date/time	User	IP address
3/10/18, 10:44AM EST	Nick Foster (Nfoster)	148.75.114.228
3/09/18, 2:29PM EST	Nick Foster (nfoster)	75.127.174.218

Place your cursor over the menu and it will give you a list of things you can find, including objects:



The screenshot shows the CollectiveAccess dashboard with the 'FIND' menu expanded. A red arrow points to the 'Objects' option in the menu. The expanded menu includes the following options: Lots, Objects, Entities, Collections, Exhibition, Storage locations, Loans, and Last QuickSearch. The 'Objects' option is highlighted in blue. The 'Recent logins' table from the previous screenshot is also visible in the background.

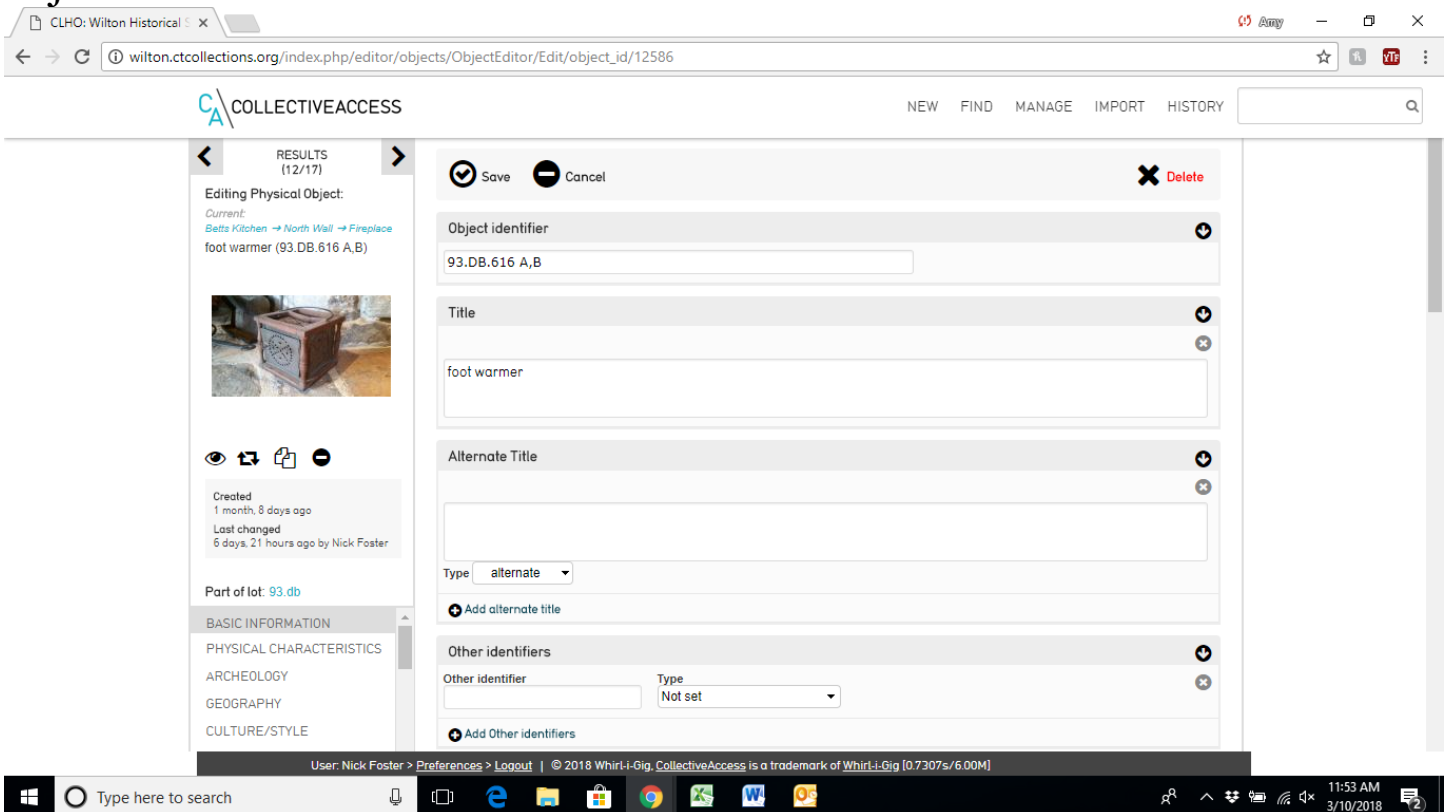
If you click basic search, it brings you to this screen:



This search bar which works the exact same way as the previous search.

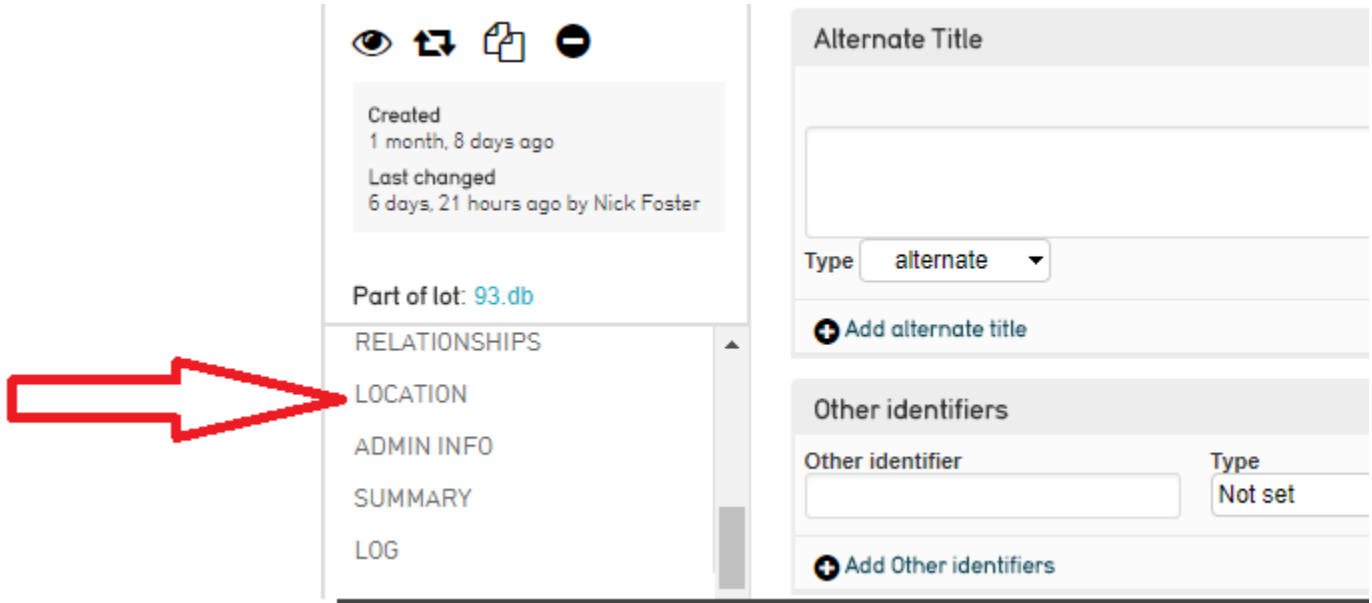
Object Pages

Below is a sample of what the page looks like when you click on a specific object:

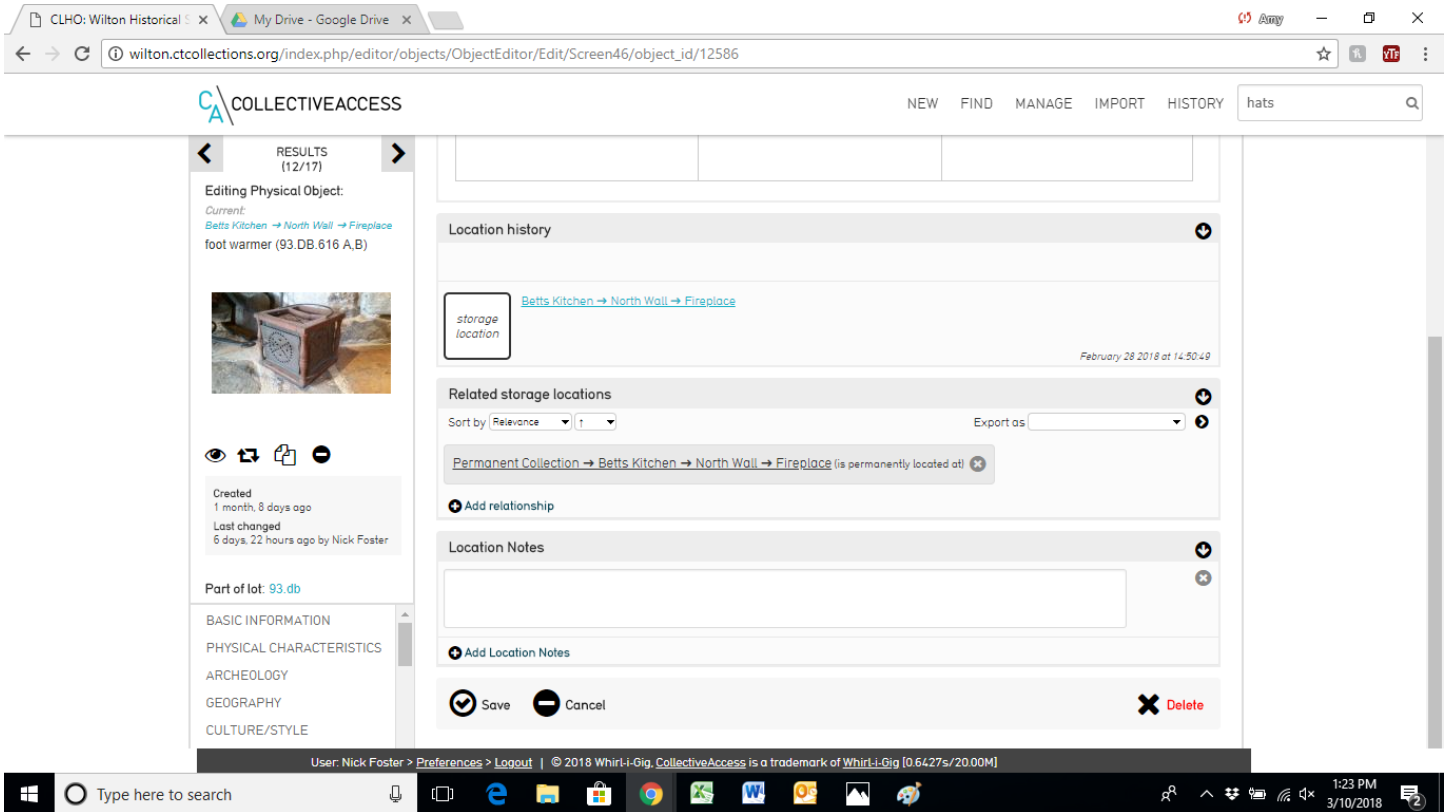


Object Locations

Locations of objects can be changed by clicking on the “Location” menu. It is located in the bottom left corner of the object page. You might have to scroll down to see it.



The location page looks like this:



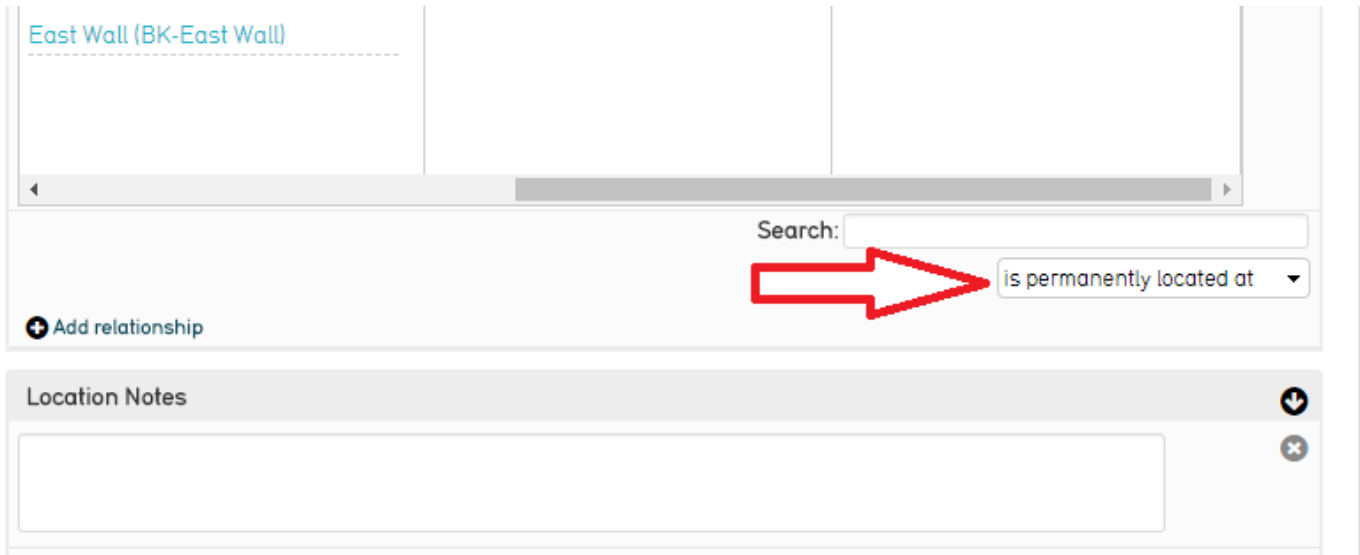
To change an object location, click on the “Add Relationship” plus sign:

The screenshot shows the 'Current' location of a 'foot warmer (93.DB.616 A,B)'. The current location is 'Betts Kitchen → North Wall → Fireplace'. Below this, there is a 'storage location' box. To the right, the 'Location history' section shows the current location. Below that, the 'Related storage locations' section has a dropdown menu set to 'Relevance' and an 'Export as' button. A search bar contains the text 'Permanent Collection → Betts Kitchen → North Wall → Fireplace (is permanently located at)'. Below the search bar is a red arrow pointing to a plus sign icon next to the text 'Add relationship'. Below this is the 'Location Notes' section.

Which will bring up this search bar:

The screenshot shows the search bar interface. The search bar contains the text 'Permanent Collection → Betts Kitchen → North Wall → Fireplace (is permanently located at)'. Below the search bar is a red arrow pointing to the search bar. Below the search bar is a plus sign icon next to the text 'Add relationship'. Below this is the 'Location Notes' section.

Simply search for the location you wish to move the object too. For example, Betts Kitchen -> North Wall -> Fireplace. Click on the location, make sure the box below the search bar says “is permanently located at”:



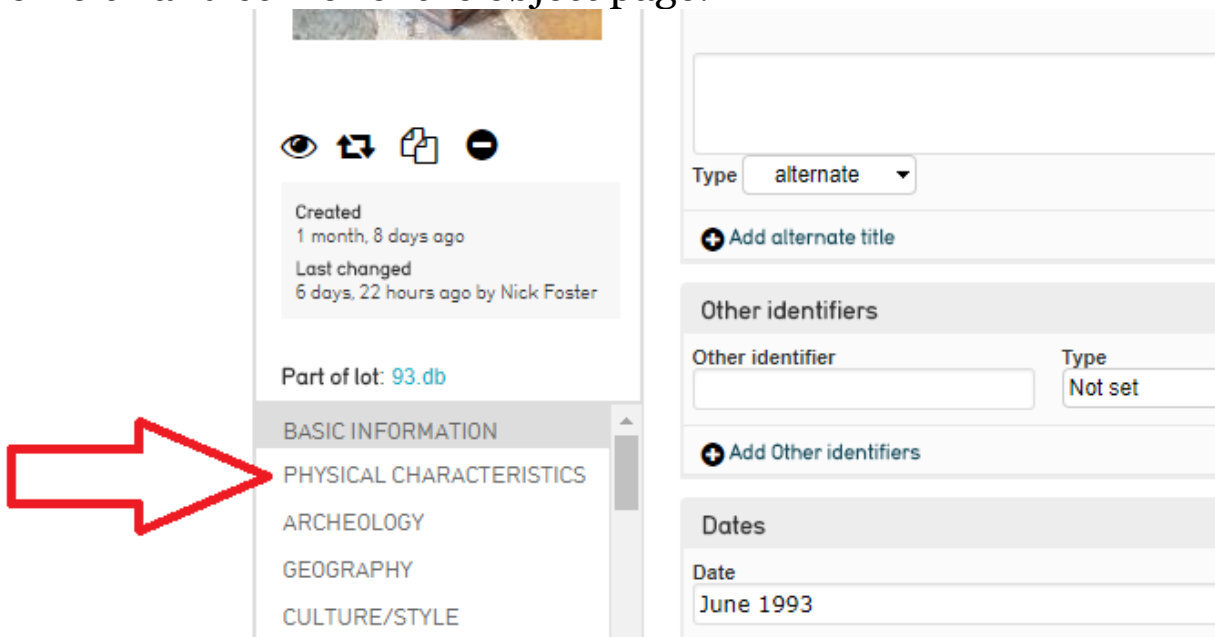
As always, click “Save”!

If a location does not exist in the search bar, make a note of where the object is located, and Nick will create the location for it.

If you’re not sure what the location is, consult the map with room names. (Room name map is forthcoming).

Object Dimensions

To add object dimensions, click on the “Physical Characteristics” menu in the lower left hand corner of the object page:



The Physical Characteristics page looks like this:

The screenshot shows the CollectiveAccess interface for editing a physical object. The browser address bar shows the URL: `wilton.ctcollections.org/index.php/editor/objects/ObjectEditor/Edit/Screen36/object_id/12586`. The page title is "COLLECTIVEACCESS". The main content area has a "Save" button, a "Cancel" button, and a "Delete" button. Below these are sections for "Dimensions", "Count", and "Accessory". The "Dimensions" section has two identical sets of input fields for Height, Width, Depth, Length, Weight, Diameter, and Circumference. The first set has "Measurement notes" that read: "CM: A: h: 19.7 /? :23.3square B: int cup H: 7.6 D(w/handle)17.7". The second set has "Measurement notes" that read: "IN: A: h: 7.75 /? :9square B: int cup W: 6 7/8 H: 3 D(w/handle)7". There is an "Add Dimensions" button below the second set. The sidebar on the left shows "RESULTS (12/17)", "Editing Physical Object:", "Current: Betts Kitchen -> North Wall -> Fireplace foot warmer (93.DB.616 A,B)", a photo of the foot warmer, and a list of categories: "BASIC INFORMATION", "PHYSICAL CHARACTERISTICS", "ARCHEOLOGY", "GEOGRAPHY", "CULTURE/STYLE". The bottom of the screenshot shows a Windows taskbar with the system clock at 1:38 PM on 3/10/2018.

Simply type in dimensions into the corresponding Height, Width, Depth, etc. boxes. If the dimensions are only listed in “Measurement Notes”, please move them into the appropriate boxes (it makes it easier to search later).

Object Condition Report

To add edit an object’s condition, click on the “Condition” menu in the lower left hand corner of the object page:


The screenshot shows the "Condition" menu in the lower left hand corner of the object page. A red arrow points to the "CONDITION" menu item. The main content area shows the "Alternate Title" section with a text input field, a "Type" dropdown menu set to "alternate", and an "Add alternate title" button. Below this is the "Other identifiers" section with an "Other identifier" input field and an "Add Other identifiers" button. The sidebar on the left shows "RESULTS (12/17)", "Editing Physical Object:", "Current: Betts Kitchen -> North Wall -> Fireplace foot warmer (93.DB.616 A,B)", a photo of the foot warmer, and a list of categories: "BASIC INFORMATION", "PHYSICAL CHARACTERISTICS", "ARCHEOLOGY", "GEOGRAPHY", "CULTURE/STYLE". The bottom of the screenshot shows a Windows taskbar with the system clock at 1:38 PM on 3/10/2018.

The condition page should look like this:

The screenshot shows the CollectiveAccess web application interface. The browser address bar displays the URL: `wilton.ctcollections.org/index.php/editor/objects/ObjectEditor/Edit/Screen42/object_id/12586`. The page title is "COLLECTIVEACCESS". The main content area is titled "Condition reporting" and contains the following fields and sections:

- Save** and **Cancel** buttons at the top left, and a **Delete** button at the top right.
- Condition notes**: A text area containing the word "fragile".
- Examined by**: A text input field.
- Date examined**: A date input field.
- Documentation**: An "Upload" section with a "Choose File" button and the text "No file chosen".
- Condition rating**: A dropdown menu currently set to "Not set".
- Add Condition reporting**: A button with a plus sign icon.
- Has object been treated?**: A checkbox section.
- Treatment Priority**: A section with three radio buttons labeled "High", "Moderate", and "Low".

On the left side of the interface, there is a sidebar with the following information:

- RESULTS (12/17)**: Navigation arrows.
- Editing Physical Object:**
 - Current:* [Betts Kitchen](#) → [North Wall](#) → [Fireplace](#)
 - foot warmer (93.DB.616 A,B)
 - 
 - Created: 1 month, 8 days ago
 - Last changed: 6 days, 23 hours ago by Nick Foster
 - Part of lot: [93.db](#)
 - BASIC INFORMATION**
 - PHYSICAL CHARACTERISTICS**
 - ARCHEOLOGY
 - GEOGRAPHY
 - CULTURE/STYLE

The Windows taskbar at the bottom shows the system tray with the date and time: 2:16 PM, 3/10/2018.

Enter condition notes into the blank box, type your initials into the “Examined by” box, and enter the date that you performed the report. Click “Save”!

Each new condition report should be added by clicking on the plus sign reading “Add Condition Reporting”, and following the steps above.