

# Connecticut COLLECTIONS

A **Connecticut League of  
History Organizations** project in conjunction with



The open source collections management software

## INTRODUCTION

Connecticut Collections (CTCo) is a three-part collections management, access and digital preservation project created by the Connecticut League of History Organizations, based on a customization of the Collective Access collections management software.

CollectiveAccess is open-source software for managing and publishing museum and archival collections. It runs on any modern web browser, and is customizable through simple user interfaces — no complex programming required. Reporting tools can easily be generated and exported to spreadsheet-readable formats, PDFs, and finding aids. Mapping tools allow you to Georeference any asset, and integration with Library of Congress subject headings, Getty vocabularies, and others tag your records with standard terminology to aid in searching both within your collection, and also across several institutions on a public platform.

## About the Manual

This manual describes the various components and procedures of CTCo – our online cataloging interface for CollectiveAccess, and pertains specifically to the version developed for CLHO as Connecticut Collections.

Best practices will be encouraged, but it is up to individual groups to determine standards and practice within their own institutions. It is recommended that each member group create their own cataloging standards to reference within their system.

## Logging in

Accessing the database requires a username and password. Your CLHO/CTCo liaison will supply you with a main administrator login for your institution. You can create additional logins for your institution with different levels of access; for example, a volunteer-level log in, will only allow the user to edit basic information. On the other end, curator-level logins allow you to edit and change virtually anything in the database. Additional levels may be created or edited as needed.

To log into the system, launch your web browser and go to [yourinstitution].ctcollections.org. You will be presented with a login form (Figure 1) Enter the information supplied by CTCO coordinator and click on the “login” button.



The image shows a login form for 'CLHO: Sandbox' within the 'COLLECTIVE ACCESS' system. The logo at the top features a stylized 'CA' in blue and grey. Below the logo, the text 'CLHO: Sandbox' is displayed. The form includes two input fields: 'User Name:' with the value 'administrator' and 'Password:' with masked characters. A 'Login' button with a checkmark icon is at the bottom.

COLLECTIVE ACCESS

CLHO: Sandbox

User Name:

administrator

Password:

.....

 Login

Figure 1

## OVERVIEW OF DATABASE STRUCTURE AND TERMS

### Database Structure (Figure 2)

To work effectively with the software it is critical that you understand the fundamental components of a CollectiveAccess database. While CollectiveAccess provides great flexibility in terms of the specifics of your data model – you define your own fields, relationships and constraints – the general structure is fixed. CollectiveAccess defines types of entries that model the world that your collection exists in:

Objects	Assets within a collection. Typically these are the physical items you are managing.
Entities	People or organizations. These are the creators, artists, donors, publishers and others involved in some way with your collection. Once an Entity is created in CollectiveAccess, it can be linked to other records within the database.
Collections	A defined group of objects. Collections are primarily used for physical Manuscripts and Archival collections, but can also represent physical collections, or “virtual” collections of items associated by some criteria, or any other arbitrary grouping. Collections can handle complex cataloging, and therefore can be used for everything from simple grouping of objects to containers for collection-level finding aids.
Lots	Lots record basic intake information (donor, date of receipt, etc.) for a donation or acquisition, prior to Object- level cataloguing.
Sets	An ordered grouping of Objects defined by users for a specific purpose. Unlike Collections, Sets are ad-hoc groups of records created by a user for a practical purpose (e.g., a working checklist for an upcoming exhibition, or a set of Entities for which biographical information is needed). They are typically temporary groupings and thus not meant for collection-level cataloguing.
Media	Media (images, PDFs, documents, video, audio) that documents an Object. While Representations often consist of just the media itself, they can take additional cataloguing that is specific to that media. This allows the addition of captions, credits, access information, rights and reproduction restrictions or any other type of information on a Representation-specific basis, if needed.
Storage locations	Physical locations where Objects are stored. Storage Locations are hierarchical – you can nest Locations to allow notation at any level of specificity (building, room, cabinet, drawer).

Occurrences / Exhibitions	Occurrences have been customized to become the Exhibitions structure for CTCo. In some areas you will still see the work Occurrences rather than exhibitions. This area supports entries for tracking exhibitions, along with the objects and loans that may relate to it.
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Figure 2

## I. NAVIGATING THE DATABASE

### A. The Dashboard

The dashboard (Figure 3) 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 CollectiveAccess logo in the top left corner of the screen.

*NOTE: The Dashboard is customizable, so yours may not look exactly like Figure 3, but the main sections will be the same.*

### Navigating the Dashboard

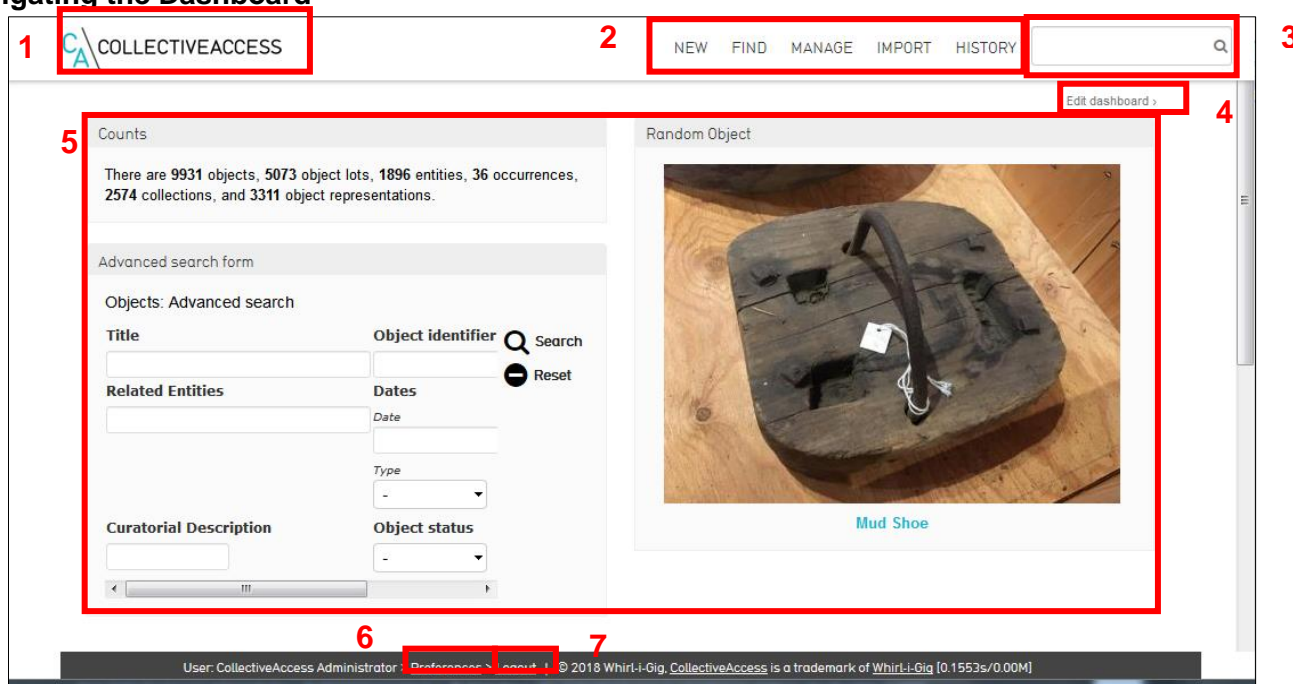


Figure 3

#### 1. The Top Logo

Clicking this logo will always be visible no matter where you are in the system, and when you click, it will bring you back to the dashboard, no matter where you are in the site.

#### 2. The Global Navigation Bar

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

### 3. The QuickSearch Form

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, collections, loans, and exhibitions. Focused searches and browses, operating on a single record type and 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 function, will be discussed in great detail later on in this section.

### 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. When you are done for the day, it is a good idea to log out, especially if you are on a shared computer.

## B. 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. (Figure 4) The set of widgets visible on your dashboard may be edited by clicking on the “edit dashboard” button. (Figure 3, no. 4)

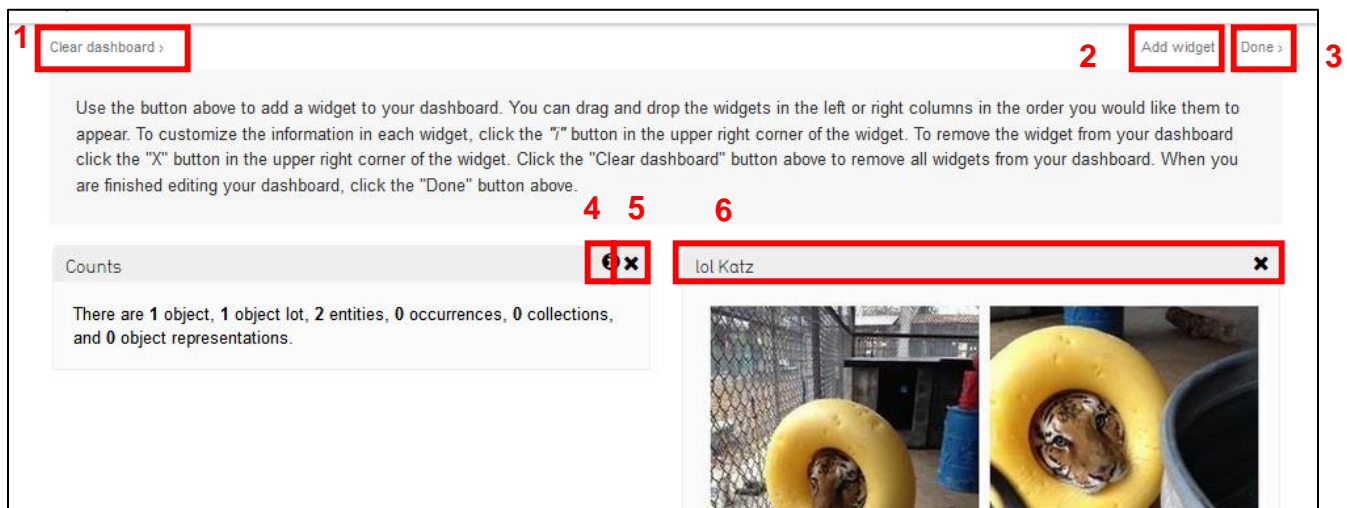


Figure 4

#### 1. Clear Dashboard

Clicking the 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. The different widgets and what they do will be discussed later in this section.

### 3. Done

Click this button when you are done editing to return to the regular view. Widgets may only be added to, remove from or moved around the dashboard while in editing view.

### 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 analog, 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 changed will be tracked.

### 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 using the mouse cursor. Simply click on the gray bar at the top of the widget window and drag it to the location in which you'd like it.

## C. Navigating the Global Navigation Bar and Main Screen

CollectiveAccess uses a simple interface so that you can easily navigate between creating, editing and searching for your records. In Figure 5 you will find what a typical screen looks like after a user has chosen to create a new object:

The screenshot shows the 'Creating new Physical Object' form in CollectiveAccess. The interface includes a top navigation bar with the logo (1) and a menu (2). A left sidebar (3) lists various categories. The main form area (4) contains fields for 'Object identifier', 'Title', 'Alternate Title', 'Other identifiers', and 'Dates'. A 'Save' button (5) is located at the top of the form area. The form is divided into sections: 'BASIC INFORMATION', 'PHYSICAL CHARACTERISTICS', 'ARCHEOLOGY', 'GEOGRAPHY', 'CULTURE/STYLE', 'VALUATION', 'PROVENANCE AND RIGHTS', 'CONDITION', 'SUBJECTS', 'MEDIA', 'RELATIONSHIPS', 'LOCATION', 'ADMIN INFO', and 'SUMMARY'.

Figure 5

### 1. Home Page

Clicking on the Collective Access logo will get you back to the main Dashboard for your login.

## **2. Global Navigation Bar**

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

## **3. Local Navigation**

This menu allows the user to navigate between Screens when editing records and preferences or when performing a search. (The options are grayed out until you create a save a record. Only one field needs to be filled out to Save a record.

## **4. Fields**

The boxes that allow the user to enter information freely. Fields can be customized to accept only certain data types such as text, numerical values, and date ranges.

## **5. Save/Cancel**

You must **SAVE** a record before navigating to another screen, otherwise you will get a pop up screen asking if you want to Stay or Leave. If you decide you do not want to save the record, you can select Cancel.

*NOTE: For a complete guide to the vocabulary and terms used in CollectiveAccess, please consult the Glossary in the Appendix for this manual.*

## OBJECTS

Objects are the artifacts in your collections. This section explains how to create new object records, find existing records, and edit information

### The Object Worksheet

Information about an object is entered on the object worksheet (Figure 6). Worksheets are the main way in which you enter your data into the Connecticut Collections system, and the worksheets for other types of data, like Entities, follow similar patterns.

The screenshot shows the 'COLLECTIVEACCESS' interface for editing a physical object. The left sidebar (1) contains a menu with categories like 'BASIC INFORMATION', 'PHYSICAL CHARACTERISTICS', 'ARCHAEOLOGY', 'GEOGRAPHY', 'CULTURE/STYLE', 'VALUATION', 'PROVENANCE AND RIGHTS', 'CONDITION', 'SUBJECTS', 'MEDIA', 'RELATIONSHIPS', 'LOCATION', and 'ADMIN INFO'. The top navigation bar (3) has tabs for 'Current location', 'Edit', 'Physical Object', and 'Basic Information'. The main form area contains the following fields and controls:

- Object identifier** (4): A text field containing '1976.79'.
- Title**: A text field containing 'Mary Fish Silliman'.
- Alternate Title** (6): A text field containing 'Oil painting'. A dropdown arrow (6) is visible to the right.
- Other identifiers** (7, 8): A table with two rows. The first row has 'Bin 038' as the 'Other identifier' and 'inventory number' as the 'Type'. The second row has '1976.79.' as the 'Other identifier' and 'previous number' as the 'Type'. A dropdown arrow (8) is visible to the right of the second row.
- Buttons**: 'Save' (checkmark icon), 'Cancel' (minus icon), and 'Delete' (X icon) are located at the top right.
- Image**: A portrait of Mary Fish Silliman is shown on the left side of the form.
- Part of lot**: A link to '1976.079' is displayed below the image.

Figure 6



### **1. Inspector Window**

After a record has been saved for the first time, the inspector window will appear in the top left corner of the record. (See Figure 6.1 for more detailed information.)

### **2. 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 the main window.

### **3. 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.

### **4. Field**

Each record is made up of a series of named fields. The information which is to be placed in each field is explained briefly by the built-in data dictionary, which can be accessed by hovering your mouse cursor over the name of the field. More detailed definitions, including cataloguers' rules and examples, can be found in References.

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 list fields which draw from a specified 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 date you have entered, the system will display the cause of the error and not allow you to save.

### **5. Add Button**

Adds an extra entry area for the associated field.

### **6. Field Hide/View**

To make more room on your screen, if you click on an arrow pointing down, the field will collapse, and the arrow will turn to up. To expand the field again, click on the Up arrow.

### **7. Drop Down Menu**

Allows you to select from a pre-defined set of options.

### **8. Delete Button**

Deletes a field. The main field type remains, 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.

## The Inspector Window (Figure 6.1)



Figure 6.1

### 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. Click RESULTS will take you back to your full list of search results.

### 2. Identifying Information

Displays the object type, title, and object identifier.

### 3. Location

Shows the current recorded location of the object.

### 4. Media Thumbnail

Shows a thumbnail image of attached media. When there are multiple items attached to a 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.

### 5. Watch List icon, Change type, Copy record, Less/More info button

### 6. Lot info

If a record is related to a Lot, the link to the lot appears here. You can go directly to the Lot record by clicking on the link.

## CREATING NEW RECORDS

### New Object Records

The Default profile has five initial Object Types defined for you in a pull-down menu.

To create a New Object Record, click or mouse-over the NEW tab in the Global Navigation Bar. Select Objects in the dropdown menu (Figure 7), and choose a Type (Still Image, Physical Object, etc.) to create a new record in the Object Editor.

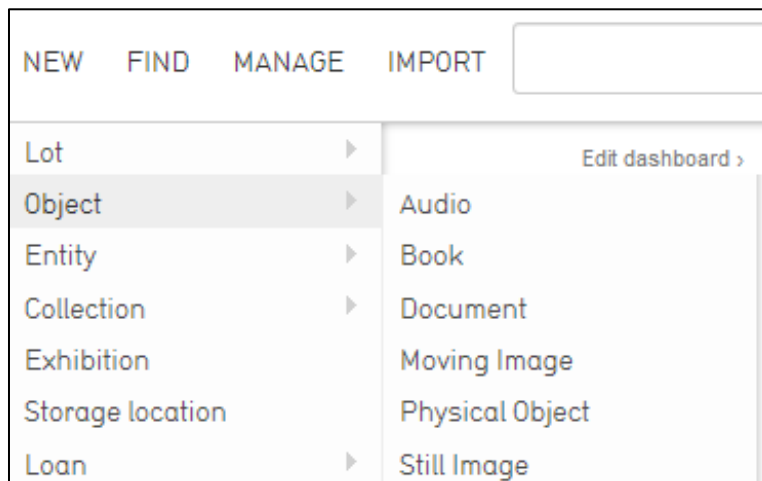


Figure 7

### CLICK SAVE

A record MUST BE SAVED FIRST to activate the local navigation menu. When a record has successfully been created, you will see a box (Figure 8) displayed in the Control Bar at the left, and once the record is created you are able to navigate to the following screens.

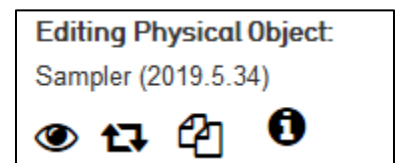


Figure 8

### SCREENS

The Object Editor includes eight screens that contain the fields that receive information about your new Object:

- BASIC INFORMATION
- PHYSICAL CHARACTERISTICS
- ARCHEOLOGY
- GEOGRAPHY
- CULTURE/STYLE
- VALUATION
- PROVENANCE AND RIGHTS
- CONDITION
- SUBJECTS

- MEDIA
- RELATIONSHIPS
- LOCATION
- ADMIN INFO
- SUMMARY
- LOG

## ENTERING DATA

Once you create a new record, it will open a new blank object worksheet. Each record contains a number of screens, each of which contains fields related to a different aspect of the object record. So, for example, the Basic Info screen contains the basic facts about an object, such as Title, or Accession Number (Object Identifier).


If you are unsure about what a particular field is used for, hovering your mouse cursor over the field title will reveal the data dictionary entry for that field, providing you with a definition of what the field is used for.

## BASIC INFORMATION

Contains the most basic information to start a new record.

- **Object identifier [required]**  
Enter in an alphanumeric identifier based on the naming conventions established by your institution.
- **Title**  
Record the object's title.
- **Alternate Titles**  
Enter any alternate titles for your Object.  
NOTE: Selecting "Alternates" from the drop-down menu will allow you to identify this title as a second title for your object (for example, if a painting has titles in English and German, or if you have a more common name, or nickname for your object)  
Selecting "Use For" will allow the system to identify your Object by this title, but it will never display it as an alternative. For example, if your painting, "Red No. 1" is commonly referred to as "Red Number 1", entering this as a "Use For" title will train the system to retrieve the correct record even when the misspelled name is entered.

Click the  to enter additional alternate titles.

If an alternate title is not needed, click the  to remove this field from view

- **Other identifiers**  
If your object has any other numbers related to it, such as old Inventory Numbers, enter them here. Choose Type from the drop-down to identify what this number is.

Click the  to enter additional Other identifiers.

- **Dates**  
This is where you enter any associated dates of your objects.

Enter your date, and select the appropriate Type (Figure 9). When

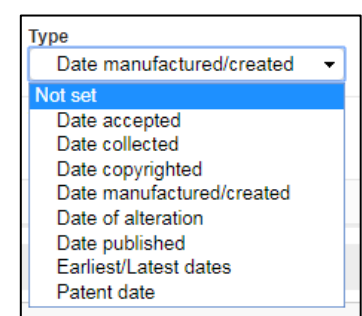


Figure 9

you Save, the system will format your date.

Click the **⊕** to enter additional Dates as needed.

- **Curatorial Description**

Enter the physical description of your item. Enter identifying features here, using keywords and descriptive terms that will help people search and find the record. The curatorial description contains more technical terminology, both to enable the record to be found in searches, but also to be useful to researchers or even to other museums in comparing or researching items.

NOTE: Do not to add any history or notes for the object here. Those can be entered into another field, and will make more sense in a display of the object record.

- **Public Access Description**

This is where you can add a description similar to what you would want to appear on an exhibit label. You can add text that will make send to a researcher who may not have be able to see an image, and you can also tell some of the history of the item.

NOTE: In the public portal, this is the description that will be seen first. If there is no Public Access Description, then the Curatorial Description will be displayed.

- **Related entities**

Use this field to establish relationships your objects may have to donors, publishers, owners, etc.

This field is displayed on the Basic Screen for easy reference, and is also displayed in the Relationships Screen with any other related records your Object may have. This is a lookup field where you can enter your related people or businesses to the object.

Begin typing the name you are looking for, and the system will start showing you suggestions. (It will also search by alternate name.)

If the name you are looking for doesn't show up, it will also give you the option to create the new record from here. See [insert section here for Quick Create instructions]

Once you have selected your Entity, select the type (see Figure 10)

Click the **⊕** to enter additional Related entities.

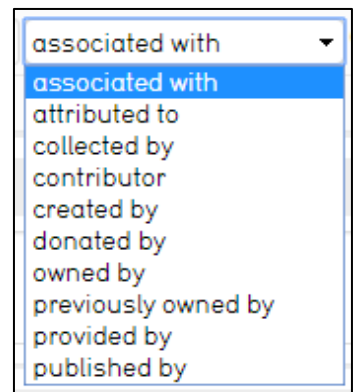


Figure 10

- **Credit line**

This is where you enter the official credit line for the item. (i.e.: Gift of John Smith; Gift of the Smith and Sons Company; Museum Purchase; Museum Historical Society Center collection)

This should be the official credit line agreed to on Deed of Gift, and should be what is used throughout the record of the item.

- **Exhibition label**

Label text can be entered here.

This will allow it to be part of any Exhibition label reports you generate. It can be for a

current exhibition, or a generic all-purpose label.

- **Notes**

Enter any additional information as determined by your institution.

## PHYSICAL CHARACTERISTICS

Contains specific physical information about your object, such as dimensions, and medium.

*NOTE: This page is dependent on the Object Type. Audio will have two fields available:*

**Duration:** to be recorded as hh:mm:ss

**Format:** the actual format of the audio file

*For type Books, there is no Physical Characteristics page.*

- **Dimensions**

You can specify separate sets of dimensions for the object itself overall, any components or accessories. (Figure 11)

When entering the number into the appropriate field, (i.e.: Height, Width) you must be sure to specify the unit of measurement used, such as inches or centimeters.

The system will understand markers such as “ or cm. Any additional notes about the measurements can be added into Measurement notes.  
i.e.: Dimensions taken from old worksheet; or To be confirmed.

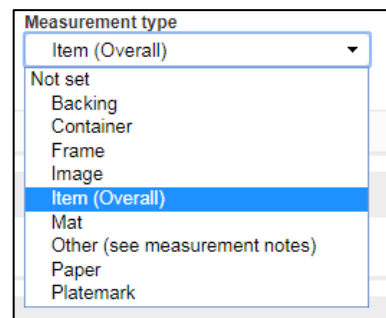


Figure 11

- **Count**

The number of components for your object.

i.e.: For a dress with a separate bodice and skirt, you would enter 2. For a teapot, where you have the pot with a lid, you would enter 2. You treat these items as one object, but they both have 2 parts to them.

- **Accessory**

This refers to any additional part or parts that belong to an object. Such as a frame that goes with a painting, or custom mount that goes with a particular object.

- **Material**

Type of material an object is made from. i.e.: Wood, silver, paint, cotton, paper, bronze, etc. It is acceptable to qualify that something is unknown, like 'Unidentified silver-tone metal', if you don't know if it is steel, aluminum, silver, gold, etc.

- **Technique**

Artistic technique of an artwork.

- **Medium**

Categorization of an item by the materials used, i.e.: Watercolor; drawing; sculpture, oil painting

- **Inscription**

A description of any markings, signatures or inscriptions on the object  
- Language.

Most commonly English. Should be noted if it is a different language.

- Position.

Location of the inscription on the item. On recto, lower left corner.

On verso at top. On verso at bottom.

- Technique.

How the inscription is placed on the item. i.e.: Handwritten in pencil.

Handwritten in ink. Printed in black ink. Stamped in blue ink.

- Text.

Exact transcription of what is written on the item. Use quotes to indicate that you are transcribing exactly what you see. If there is a spelling error, transcribe as written, using [sic] to indicate that it was original and not a cataloger mistake. Keep capitalization. If there is a symbol or signature, use [ ] to indicate this. i.e.: [manufacturer's symbol of an eagle with outspread wings within a circle]

- Translation.

Only if you have a foreign language. Will not be used often.

- Type.

If the Inscription is on something like a label in a garment. You can also use this for 'handwritten' or 'printed', but fine to use in technique.

- **Signature**

Used for an artist's signature. Mostly for paintings, but can also be used for prints where the printer or artist has printed their name on the paper.

- Signed name.

Enter exactly as signed.

- Signature location.

i.e.: Lower right; Lower left; Center at bottom, etc.

## ARCHAEOLOGY



[This section to be forthcoming]

## GEOGRAPHY

Tracking any geographic locations related to your object. Place the items was made, used, or place it depicts.

- **Georeference**

This is a lookup field (Figure 12) that allows you to map a geographical location related to your Object on a map. In the lookup field at the top right, enter your desired address, or just a town, or a zip code.

Click on the and you will see the turning gear, and the map will go to your location. If the location on the map is incorrect, add more detail to your lookup. i.e.: enter Fairfield, Connecticut rather than just Fairfield.

Once the map centers on your location, use the markers at left to 'drop a pin', or a circle to mark your location or general area.

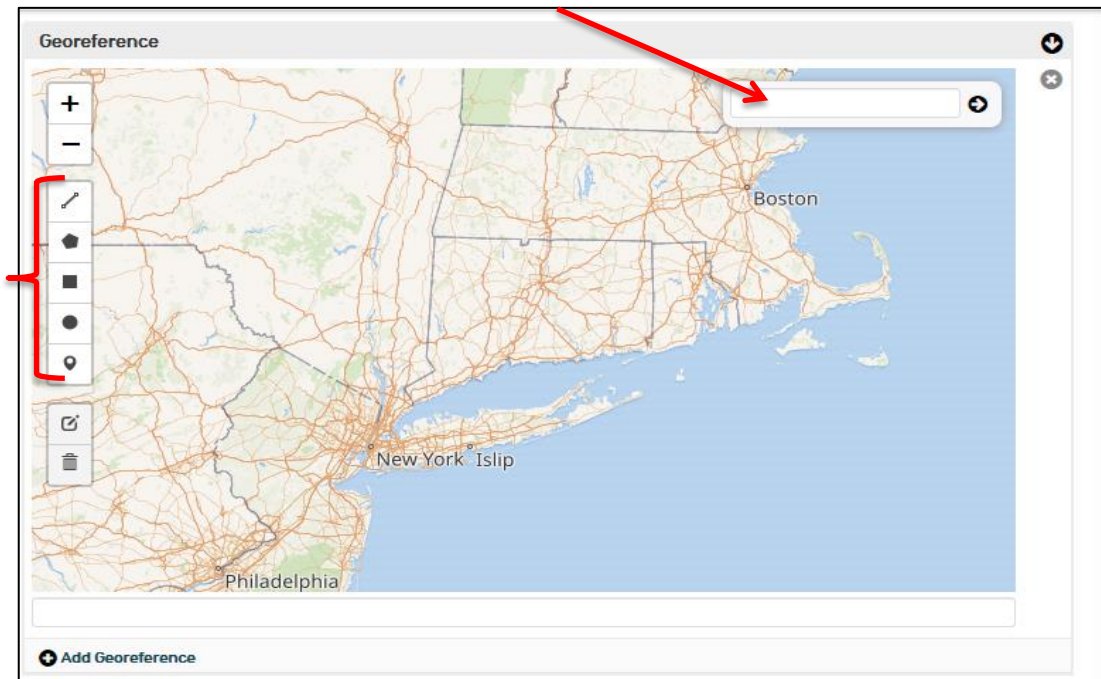


Figure 12

Upon saving this Screen, you will be able to search or browse geographical locations in search; Georeference will show you the geographical coordinates of the address you supplied and provide an aerial map of its location (Figure 13).

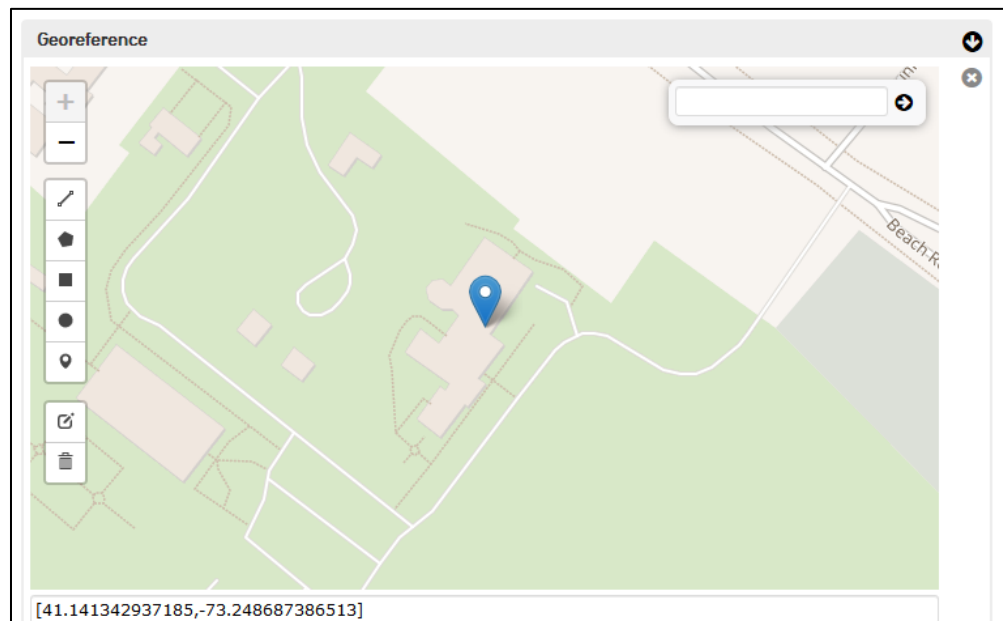


Figure 13

- Geographic Notes**  
 Any information about the Georeference you entered. Made in Fairfield, CT; Used in Hartford, CT; Originated in Paris, France.



## CULTURE/STYLE

Keep track of any related cultures or the school and style of an object.

- **Culture**  
The culture, nationality, or people that the object originates from. i.e.: Scottish; Native American; Pequot;
- **School**  
Group of people associated with the item. i.e.: Hudson River School;
- **Style**  
The distinctive or characteristic manner of expression. i.e.: Impressionism; Cubism

## VALUATION

Any related monetary assessment or value related to your object. Official appraisals can be added here, along with a purchase price, and the current insurance value.

- **Appraisal information**
  - Date of appraisal.
  - Appraised by.  
*NOTE: This is a free text field; this does not link to Entities.*
  - Appraisal amount.
  - Reason.  
Purchase price; Donor request
  - Notes.  
Enter any other relevant information to appraisal value here.
- **Price**  
The dollar amount is entered here. The system is set to U.S. Dollars.
- **Insurance value**  
The current insurance value should be entered here. This value will be used for any loans or travel insurance.
- **Valuation notes**  
Any additional notes related to the overall value information. Can be used for comparable items, such as items sold through auction houses.

## PROVENANCE AND RIGHTS

Noting the history of an object, along with any rights ownership, and where an item may have been published in its history.

- **Provenance**  
A detailed history of the past ownership of an item. Information should include ownership and successive transfers of ownership of an item. Ideally, the Provenance field will list the history of the item from its creation through subsequent owners, to the final transfer to your institution. The format will depend on your institutional preferences. Keep in mind that it should stay basic, extra narrative can go in Label Text or Public Access Description.

### Examples:

1805 Made by Eliphalet Chapin in Windsor, CT.

1873-1905 Passed to the children of Eliphalet Chapin, and down through the family.

1905 Sold at [insert auction house here] to Ellen Smith, grandmother of the donor.

1953-2015 Passed through the Smith family to the donor.  
2015 Donated to the [insert your museum here] by Samuel Smith, III, of Old Lyme, Connecticut.

OR

This desk was made by Eliphalet Chapin in Windsor, CT in 1805. At his death in 1873. It was passed to his children, and then to their descendants. In 1905 this was sold at auction by Christie's of New York, to the donor's grandmother, Ellen Smith of Old Saybrook, CT. It was passed to her son, Samuel Smith, II, and then to his son, the donor, Samuel Smith, III of Old Lyme. Donated to [insert your museum here] on 12 October 2015.

*NOTE: If an item was found in collections, and you do not have any history for it, it may be a good idea to note it there. Such as, 'Found in collections, October 12, 2019.'*

- **Ownership**

Look-up field cross-reference to entities. Begin typing the name of the past owners of the item, select person/business from the list. If your person/business does not show up, use Quick entry to create the entity. Select Type from the pull-down.

- **Rights**

- Rights/restrictions. If there are any restrictions to an item, it should be noted here.
- Rights holder. This will mostly be used for current artists who may have given you a work, but has not signed over the copyright.
- Copyright statement. For either your institution or the copyright holder.
- Notes. Any relevant notes related to the rights, such as when a copyright may end, or who to contact for rights permission.

- **Publication**

Record anywhere the object has been published. This could include books, documentaries, calendars, newsletters. Following a standard bibliographic standard will be helpful for consistency.

## **CONDITION**

Any related physical condition reporting of your item. Initial condition report when something enters the collection, before it goes out on loan, or any conservation treatment that is being considered, or has been done on an object.

- **Condition reporting**

Describe the condition of your object. Additional condition reports can be added at any time by clicking the + .

- Condition Notes. Free text field to describe the state of your item. Describe exact locations of damage as exactly as possible, along with size of damage area.
- Examined by. Not linked field to note who has examined the item.
- Date examined. Very important field to enter, even if you only know the year. This will help track the condition of the item over the years, and will tell you if damage is old, or has occurred over time.
- Documentation. This is where you can enter Media related to the condition of the item. Media could be an image of the damage or a document, like a scanned damage report.
- Condition rating. This dropdown menu allows the user to assign a controlled condition. Choices of Excellent, Good , Fair, Unstable, Poor. Discuss the rating system with your

staff to ensure you are all on the same page as far as what may need attention.

- **Has object been treated?**

Check box to indicate if any object has been treated.

- **Treatment Priority**

Check boxes listing High, Moderate, and Low. Like the Condition rating, discuss with your team what you consider all these terms to mean, so that everyone is on the same page.

- **Conservation**

Tracking any actual conservation proposals or treatment planned for or done on your item.

- Treatment Proposal. (Media related field) Upload any media related to conservation treatment here. Treatment Proposals, Reports, Media could be added here.

- Treatment date.

Date treatment was done, or report was done.

- Cost.

Cost of the proposal, treatment, or other related expense.

- Treatment performed by. Related entity that performs the work on the item.

- Notes.

Any related comments on the Conservation Treatment.

## **SUBJECTS**

Enter genres, subjects, and topics here that describe the object. This screen displays lookup fields only and includes standard authorities.

Selected authorities include:

- Getty Art and Architecture Thesaurus (AAT)
- Getty Union List of Artist Names (ULAN)
- Getty Thesaurus of Geographic Names (TGN)
- Library of Congress Subject Headings (LC)
- Library of Congress Name Authority File (NAF)
- Library of Congress Thesaurus of Graphic Material (TGM I)
- Legacy Nomenclature – the Legacy field is the only exception to standard authorities. For institutions having data migrated from a previous system or database, this field will contain any previous terminology that does not coincide directly with a CTCof field, such as Tags, or your own Type field.

*To find terms:*

Type the first three or more characters of your desired term to view the closest matches available from the selected authority.

Select your desired term and click Save to apply your changes.

Next to your field, a hyperlink labeled “More” provides a quick reference to the chosen term in the authority you are using.

If you can't find what you think you need, sometimes it is easier to go to the main website for the authority and search there. Then you can either copy/past the term, or the related number.

AAT: <http://www.getty.edu/research/tools/vocabularies/aat/index.html>

ULAN: <http://www.getty.edu/research/tools/vocabularies/ulan/index.html>

TGN: <http://www.getty.edu/research/tools/vocabularies/tgn/index.html>

LC: <https://authorities.loc.gov/cgi-bin/Pwebrecon.cgi?DB=local&PAGE=First>  
NAF: <https://authorities.loc.gov/cgi-bin/Pwebrecon.cgi?DB=local&PAGE=First>  
TGM: <https://www.loc.gov/pictures/collection/tgm/>

For more full explanation of the specific authorities and their uses, see Appendix.

## MEDIA

Files, images, video or sound clips representing your record. All of the currently common formats (such as TIFF, JPEG, MPEG-4, Flash Video, WAV, AIFF and MP3) are supported.

### Media Representations

The following metadata elements appear for each Media Representation that you upload. To upload multiple Media Representations for your record, click **+** Add Representation (Figure 14). Each Representation will appear as its own line-item on the screen.

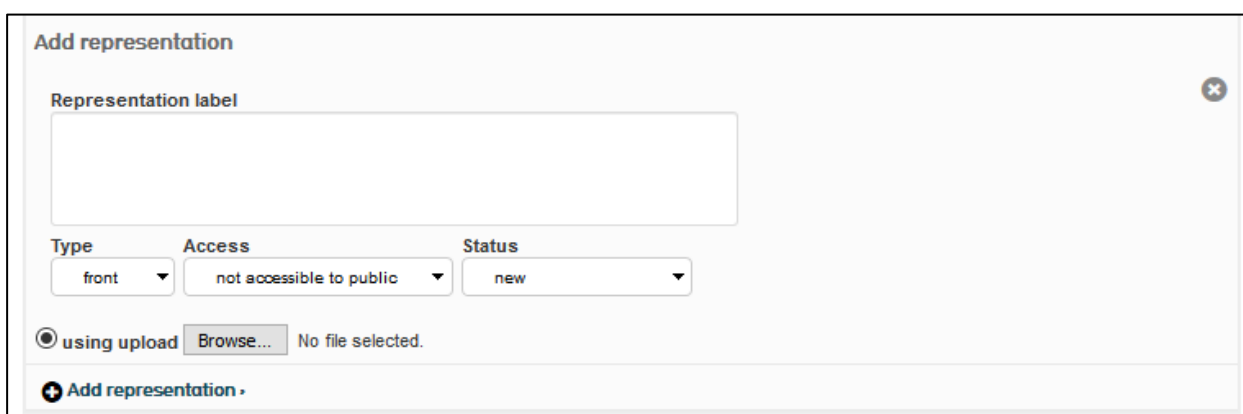


Figure 14

- **Type**  
If this is scanned media, you may use this dropdown to label the front and backside of your object
- **Access**  
Choose the access level of your Media.  
*NOTE: This access level can differ from the access level of the general record. When you create a Media records, if it will be accessible to the public at a later date, you can mark it as such now. It will not be visible until the entire is marked as Accessible; this will save you the time of going back and marking it.*
- **Status**  
You can assign a cataloging status to your Media.  
This status can differ from the status assigned to the general record.

### Media to Upload

This is where you will upload selected Media from your computer. CTCO will resize photos for you at various sizes as called for; for this reason it is best to use the highest quality images you have on hand.

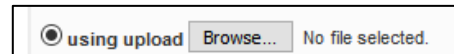


Figure 15

The “using upload” is automatically selected. (Figure 15) Click on the browse button to locate the desired media on your computer. Select the file and click “open”.

Once your file is selected you will see the filename rather than No file selected.

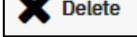
If you would like to upload more files, click the “add representation” button and repeat. When you are done adding files:

CLICK SAVE to view your uploaded Media.

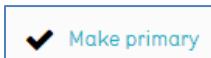
Upon saving, you will see the Media representations window open with a thumbnail of your media and brief file information (click Embedded Metadata to view additional information collected by CA).

You will see options to the right. (See Figure 16):

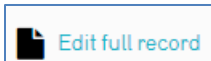
✕ Will DELETE your uploaded media, but keep other Media Representations and the general media fields intact.

**NOTE: DO NOT** use the  **Delete** at the very top of the page to delete a media record –this will delete the entire record rather than just that individual record.

The first image you add to the record will be treated as the Primary image and be the main representation of the record. If you load more media and prefer something else be primary, you can update this at any time.



Will change this representation to the Primary after you click Save.



The EDIT icon opens the Object Representation screen, allowing you to catalog additional information pertaining to your Representations on an individual basis, such as titles, captions and relationships. (See more detailed instructions below.)



Allows you to DOWNLOAD your uploaded media

To edit information about your Media representation, click on and this will open the Object Representation window.



will

## OBJECT REPRESENTATIONS (EDITING)

Allows you to catalog additional information for each media file that you upload. This is not necessary, but will give you more information about your media for publication and research.

Click Edit full record (Figure 16), and a screen will open (Figure 17).

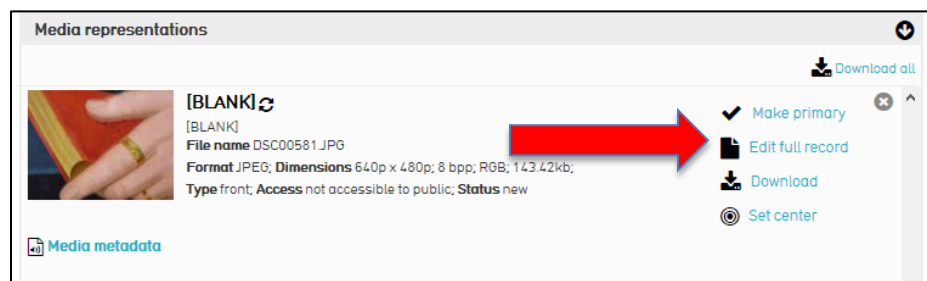


Figure 16

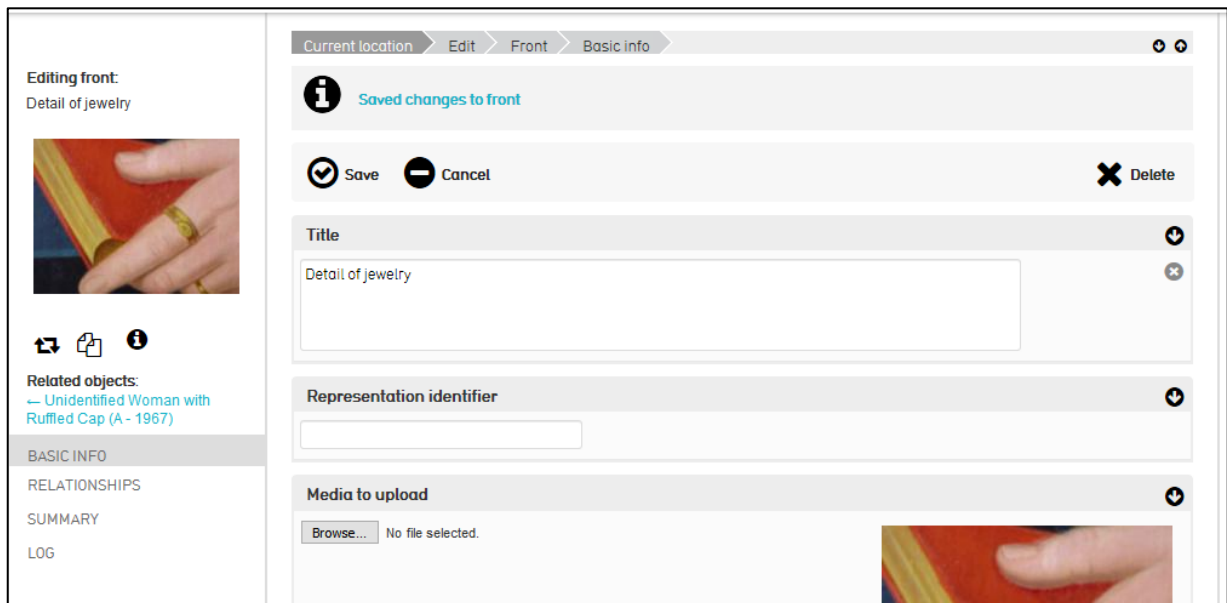


Figure 17

## Basic Info

- **Title**  
Give your uploaded Media a Title or Caption here.
- **Representation identifier**  
This is blank by default. If you have a system of recording the id, record this here.
- **Media to Upload**  
You may replace your uploaded media with a new file by uploading it here
- **Creator**  
Record the photographer or person who scanned an item here. This is highly recommended if you hire an outside photographer who may need to be credited in any images published. Related to Entities.
- **Rights**
  - Rights/restrictions  
Note any restrictions on using the media here. Note if a photographer needs to be credited, or if an image is privately owned and not to be published
  - Rights holder  
Record here anyone who may hold the rights to media if it is not your museum
  - Copyright statement  
Your copyright statement here. Follow copyright law and procedures to determine the best rights statement for your institution.
  - Notes  
Record any information here that is not covered by the above fields.
- **Notes**  
Record any other information about the media representation here.
- **Access**  
You may change the access level of your media here. (This field is displayed on the

Media Representation Screen and any changes you make will be reflected there.)

*NOTE: To display your media to the public, this field must be made Accessible to Public. Even if you're main Object Record is accessible to the public, if this is not checked off, it will not be shown. If an object/image is subject to copyright, you can leave the Media Record not accessible, allowing you to present a record to the public to let them know you have an item, without violating any copyright that may prevent you from displaying the actual image.*

*NOTE: As you are adding media records, if you know you that you will want media published online, check off Accessible to Public at this point, then you will not have to go back and retroactively update the record. The image will not display until the overall record is marked Accessible to Public.*

- **Record Status**

You may change the status of your record here. This field is also displayed on the Media Representation Screen and any changes you make will be reflected there. To track if the record is New, Editing in Progress, or Completed, among other choices.

## Relationships

- **Related entities**

Lookup Entities that are related to your Media Representation. Related entity types on the pull down include: Rights held by, was created by

- **Related objects**

The Objects related to the Media record; if you want to link this image to another record, you can add them here. This is useful when taking documentary shots of a set of items, or a room where there are several items in situ. You can attach the media record to all of the individual object records.

## Summary

Shows a quick report of the Title, the Representation Identifier, and the Representation Label (usually the same as the Title).

## Log

This screen tracks the changes made to your Media Representation record.

CLICK SAVE to update the changes to your Representation.

To return to the main record, click the Related objects title hotlink that appears in the left-hand choices. (Figure 18)

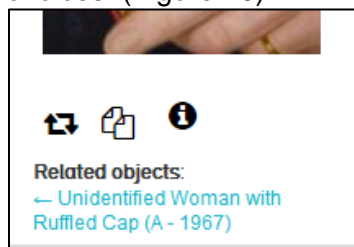



Figure 18

## RELATIONSHIPS

Create, view and edit Relationships to Lots, Entities, Collections, Exhibitions, Loans, and Objects.

- **Related Lot**

Only one lot can be related to an object

All other fields: Enter the desired related item in the field, and the gear will turn while looking up the connection. If you are adding more than one connections, click on the  [Add relationship](#) to add as many relationships as you need.

## LOCATIONS

The physical location of your object. This tracks where your object is currently stored and a history of where your object has been stored in the past. For creating and organizing locations, see Location section of this manual.

- **Location in hierarchy**

Click on Show Hierarchy as one of the ways to move the object, or add another layer of location. This is object related, so if any item is stored within another item, such as a hat in a hat box.

- **Location history**

This shows the location trail of an object, including if the item was moved to a location for an exhibition, including the date of the move. The most recent (usually current) location is at the top of the list. Click on the location link to see that location in the Location hierarchy. This is useful if you need to move that location – such as moving a box to another shelf.

- **Related storage locations**

Locations that you have linked to an object as either permanently located or temporarily located.

- **Location Notes**

Any additional information about a location.



## ADMIN INFO

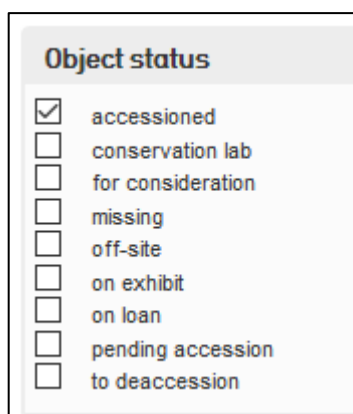
Information about the Object for Internal Use, including record status and deaccession information.

- **Collection source**

Pull-down to select the Connecticut Collections institution that owns the item.

- **Object Status**

This list (Figure 19) allows you to mark your progress in the cataloging process. Choose from:



The image shows a form titled "Object status" with a list of checkboxes. The first checkbox, labeled "accessioned", is checked. The other checkboxes are labeled "conservation lab", "for consideration", "missing", "off-site", "on exhibit", "on loan", "pending accession", and "to deaccession".

Figure 19

You may not be able to check off more than two boxes at a time; if you have need of checking off additional boxes, please contact the system coordinator.

- **Record Status**

Choose from the drop-down the current status of the record.


Choices include: completed, editing complete, editing in progress, new, review in progress.


This is useful when several people are working on a project and/or when determining what items are ready to be published online.

- **Access**

This dropdown defines whether your record is published to the web and accessible by the public.

- **Related Sets**

Any sets that an item is part of will display here. You can remove an object from a set by clicking .

You can also add it to an existing set by clicking  [Add relationship](#)

*NOTE: If a set does not exist, it will ask if you want to create it, but it is usually easier to add the set first, then link it.*

*See more on Sets in Appendix.*

- **Deaccession status**

By default this field just shows a blank checkbox next to "Deaccessioned?" When the box is checked, an assistant field will open with more fields to record information about the deaccession. (See Figure 20)

The screenshot shows a web form titled "Deaccession status" with a downward arrow icon in the top right corner. The form contains the following elements:

- 1**: A red box highlights the "Date of deaccession" field, which includes a calendar icon.
- 2**: A red box highlights the "Date of disposal" field, which also includes a calendar icon.
- 3**: A red box highlights the "Type" dropdown menu, which currently shows "- NONE -".
- 4**: A red box highlights the "Notes" text area.

Other visible elements include a "Deaccessioned?" checkbox and a small "17" in a box next to the "Date of disposal" field.

Figure 20

### 1. Date of deaccession

The formal date that an item was approved for deaccession per the institution's deaccessioning policy

### 2. Date of disposal

The actual date that an item physically leaves the institution.

### 3. Type

Choose the way the item was disposed of from the drop-down menu:

Auction  
 Disposed  
 Exhibit prop  
 Teaching use  
 Transfer

### 4. Notes

Any relevant notes you may have for this deaccession. i.e. Transferred to Museum of Fancy Hats, Sometown, Anystate; Items disposed of due to poor condition after flood

- **Cataloged by (Legacy system)**

This field will track any cataloger information you may have had in a former system, using Cataloged by and Date cataloged.

- **Updated by (Legacy system)**

Tracks information from a former system that related to records that were updated using Updated by and Date updated.

*NOTE: The Cataloged by and Updated by fields are free text fields, and do not relate to your Entity records.*

## SUMMARY

A report page that will pull together select fields to display the information you need in one place, with the ability to download and/or printout. Standard displays are included; Custom Displays can be created as needed through Manage>My displays

## LOG

Tracks all changes associated with a record from the creation of the record, including the data changed, the date of the change, and the user.

# Collections

Collections are primarily used for Manuscripts and Archival collections, but can also represent physical collections, or “virtual” collections of items associated by some criteria, or any other arbitrary grouping. The primary difference is that Collections are used to describe a collection as a whole, rather than each individual document or object. This can be used for everything from simple groupings, to ‘containers’ for collection-level finding aids.

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.

## CREATING A NEW COLLECTION RECORD

(Manuscripts and Archives)

To create a new collection, select “New > Collection” from the Global Navigation bar. This opens up a blank Collection Worksheet.

Enter a collection identifier (must be unique), and a Title.

The pages at the left will be in gray and not accessible until you Save your new collection.

Collections fields are structured to create a standard Finding Aid format summary. The parts of a Collection can be related to each other in a hierarchy of series or boxes and files; and individual Objects can also be incorporated into this relationship.

## CATALOGING – COLLECTION LEVEL

### Identity Elements

The main page of Collections is the Identity Elements page (Figure 21), which contains the most basic information to start a new record. These fields represent the primary components of an archival finding aid. Most of these fields are required for the Finding Aid format, but remember that you are not obligated to use all the fields that are available to you if you do not have the information. It can always be added later.

See Appendix for examples of a finished Finding Aid.

- **Location in hierarchy**

Shows the location of the record in the Collection>Series>Sub-series>File

The hierarchy will follow the physical organization of the collection, as it has been organized into Series, Sub-series, and Files. You can move items from one place to another within the hierarchy, and add levels here, such as new files.

- **Collection identifier (Reference code)**

A unique alphanumeric identifier for the collection. Many institutions use “MS”

The screenshot shows the 'Identity Elements' page in the CollectiveAccess system. The page is titled 'Editing Collection: Roger Minott Sherman Papers (MS 2)'. It features a sidebar on the left with a menu of 'IDENTITY ELEMENTS' including Content and Structure, Conditions of Access and Use, Acquisition and Appraisal, Related Materials, Notes, Subjects, Relationships, Admin, Summary, and Log. The main content area has a breadcrumb trail: 'Current location > Edit > Collection > Identity Elements'. Below this are 'Save' and 'Cancel' buttons, and a 'Delete' button. The 'Location in hierarchy' section shows a tree structure: 'Roger Minott Sherman Papers' (Collection) containing 'Box 1: Personal correspondence 1793-1844 (MS 2: Box 1) Series', 'Box 2: Business Correspondence 1794-1823 (MS 2: Box 2) Series', and 'Box 3: Business correspondence 1825-1844 (MS 2: Box 3) Series'. Below the hierarchy is a 'Collection identifier (Reference code)' field with the value 'MS 2'. The 'Repository' section includes fields for 'Repository name' (Fairfield Museum and History Center) and 'Repository location' (370 Beach Road, Fairfield, CT 06824). The 'Title' field contains 'Roger Minott Sherman Papers'.

Figure 21

followed by a number to denote a manuscripts, or MC for a whole manuscript/archival collection, i.e., MS 10; MC 201.

- **Repository**

The name and physical location of the repository or institution that holds the material.

- Repository name, i.e.: Fairfield Museum and History Center
- Repository location, i.e.: 370 Beach Road, Fairfield, CT 06824

- **Title**

Enter the name or title of the Collection. i.e.: Roger Minott Sherman Papers; or Portrait Photography Collection

- **Date**

Enter date information related to the Collection. Connecticut Collections accepts a variety of dates, and will convert the date to the database standard.

There are several date Types, click on the pull down to select the date type. You can add as many dates as are relevant to your collection by clicking the +.

Date types (Figure 22):

- Bulk date(s): Dates of the vast majority of the collection. i.e.: Dates in a collection run from 1900-1988, but the MOST material relates more specifically to 1961-1987, so the entry for this would be 1961-1987.
- Circa date(s): Use circa dates if you do not have an exact start/end date to the collection.
- Date(s) of broadcast: to be used for audio/video material if it was broadcast over radio/television
- Date(s) of creation: Date the collection was created. [Collection may include items from 1700, but the as a Collection it was not actually created until 2001. Note this here.]
- Date(s) of publication: It any item was published, such as a newspaper or article, it should be noted here.
- Date(s) of record-keeping activity: Dates material may have been collected, or processed.
- Date available: [date material is available to be accessed]
- Inclusive date(s): Earliest and latest dates of materials in the collection.
- Normal date(s): [no idea]

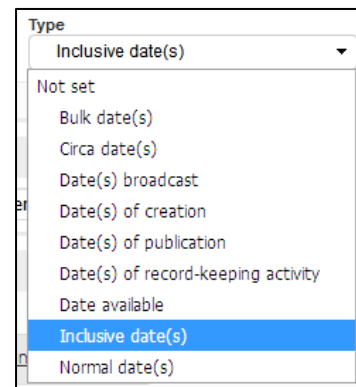


Figure 22

- **Extent**

The physical number of boxes or linear feet the collection take up on a shelf. (Figure 23)

Figure 23

NOTE: Use this handy link to help calculate what you have.  
<http://beinecke.library.yale.edu/linear-footage-calculator>

- **Creators**

The author of the material or creator of the collection. This field will link to the Entities, so you can search for an existing entity, or create a new entity from here. The only Type available is 'created by'.

- **Administrative/Biographical History Element**

Provide narrative descriptive text about the collection here. (Figure 24) This is where you enter a description of the context in which the materials being described were created, assembled, and/or maintained. For instance, if the collection contains the paper of an individual this is where you would give some relevant information about that person's biography and significance. This section will give an overview of the history of the collection, and is as important as the description of the materials themselves.

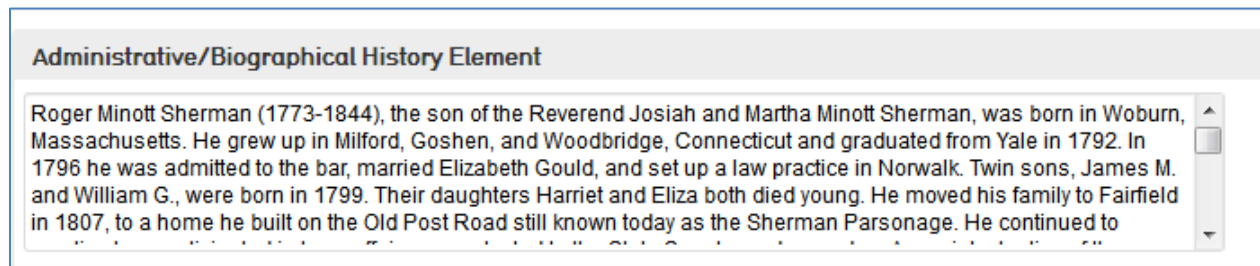
A screenshot of a web form titled "Administrative/Biographical History Element". The form contains a text area with the following text: "Roger Minott Sherman (1773-1844), the son of the Reverend Josiah and Martha Minott Sherman, was born in Woburn, Massachusetts. He grew up in Milford, Goshen, and Woodbridge, Connecticut and graduated from Yale in 1792. In 1796 he was admitted to the bar, married Elizabeth Gould, and set up a law practice in Norwalk. Twin sons, James M. and William G., were born in 1799. Their daughters Harriet and Eliza both died young. He moved his family to Fairfield in 1807, to a home he built on the Old Post Road still known today as the Sherman Parsonage. He continued to". The text area has a vertical scrollbar on the right side.

Figure 24

- **Access\***

Option to make a collection Accessible to the public or not.

\*as of 2018, Collections/Finding Aids are not yet being published to the portal, but there are plans to do so in the future.

## CONTENT AND STRUCTURE

- **Scope and Content**

This provides information about the nature of the materials in the collection. The description will enable users to judge its potential relevance. For instance, you might say that the collection consists mainly of photographs, or correspondence between J. Smith and J. Doe, or includes diaries and memos.

- **System and Arrangement**

This identifies the various aggregation of archival material, their relationships, or the sequence of documents within them. (Figure 25)

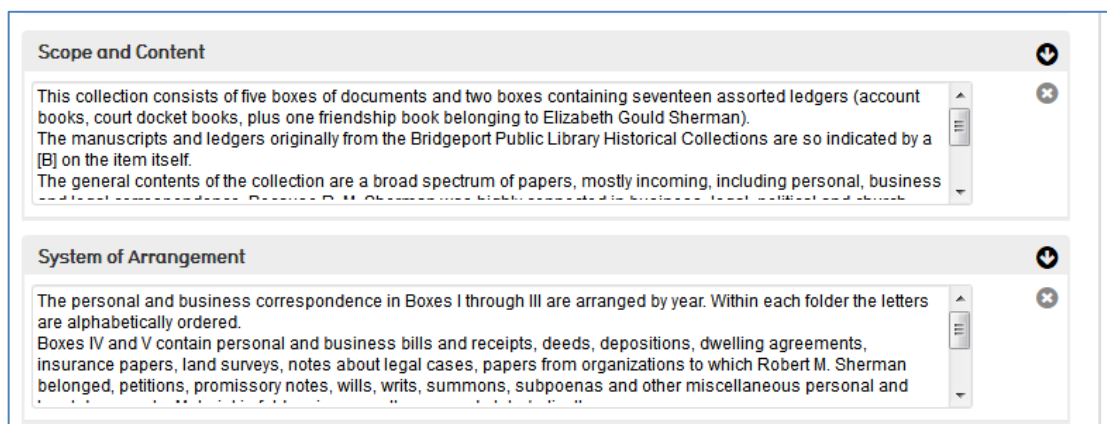
A screenshot of two web forms. The top form is titled "Scope and Content" and contains the following text: "This collection consists of five boxes of documents and two boxes containing seventeen assorted ledgers (account books, court docket books, plus one friendship book belonging to Elizabeth Gould Sherman). The manuscripts and ledgers originally from the Bridgeport Public Library Historical Collections are so indicated by a [B] on the item itself. The general contents of the collection are a broad spectrum of papers, mostly incoming, including personal, business and legal correspondence. Robert M. Sherman was highly successful in business, legal, political and church". The bottom form is titled "System of Arrangement" and contains the following text: "The personal and business correspondence in Boxes I through III are arranged by year. Within each folder the letters are alphabetically ordered. Boxes IV and V contain personal and business bills and receipts, deeds, depositions, dwelling agreements, insurance papers, land surveys, notes about legal cases, papers from organizations to which Robert M. Sherman belonged, petitions, promissory notes, wills, writs, summons, subpoenas and other miscellaneous personal and". Both forms have a vertical scrollbar on the right side.

Figure 25

## **CONDITIONS OF ACCESS AND USE**

- **Conditions Governing Access**

For any restrictions on access of the collection, either due to the nature of the information in the materials, including restrictions imposed by the donor, by the repository, or any statutory/regulatory requirements.

- **Physical Access**

Any physical access restrictions due to any physical characteristics, or storage locations that may delay access to the material, such as materials being very fragile, and having a digital surrogate, or are physically located off-site, and are not able to be accessed without prior notice.

- **Technical Access**

Any restrictions due to technical requirements, such as the item only being available on 3" floppy disk, or 16mm film.

- **Conditions Governing Reproduction**

Any restrictions on reproduction due to copyright, or publication after access has been provided.

- **Languages and Scripts on the Material**

Notes the language and/or script used in the materials.

- **Other Finding Aids**

List any other related Finding Aids that may be related and of interest to the user.

## **ACQUISITION AND APPRAISAL**

- **Custodial History**

This provides information on the ownership and change of custody of the collection. Can be from the time it left possession of the creator until was acquired by the repository that is significant for its authenticity an interpretation. Basically a provenance of the collection.

- **Immediate Source of Acquisitions**

Record any additional information about changes of ownership of the collection that do not involve direct acquisition by the repository and that are significant for its authenticity and interpretation in the Custodial History Element.

- **Appraisal, Destruction, and Scheduling Information**

Information about the rationale for appraisal decision, destruction actions, and disposition schedules that are relevant to the understanding and use of the material in the collection.

- **Accruals**

Information about anticipated additions to the collections being described. An accrual is an acquisition of archival materials in addition to that already in the custody of the repository.

## **RELATED MATERIALS**

- **Existence and Location of Originals**

This field is used to indicate the existence, location, and availability of originals when the materials being described consist of copies, and originals are not held by the repository. (For instance, a donor gives you a copy of an ancestor's journal, and currently desires to keep the original but would like to share the information it contains – that information should be noted here.)

- **Existence and Location of Copies**

This field indicates the existence location, and availability of copies or other reproductions of the material in the collection, when they are available for use in an institution or for loan or purchase, or available electronically. DO NOT mention copies in private hands or copies made for personal use. (For instance, the above example of the donor and the journal – they have also given copies to 5 other local institutions – note that here so researchers are aware they are all copies of the same item.)

- **Related Archival Materials**

This indicates the existence and location of archival materials that are closely related to the materials being described by provenance, sphere of activity, or subject matter, either in the same repository, in other repositories, or elsewhere.

- **Publication Note**

This field identifies any publications that are about or are based on the use, study, or analysis of the materials being described.

## **NOTES**

- **General notes**

Any information not accommodated by any other of the defined elements of description.

- **Conservation notes**

Describe any conservation treatment here.

- **Processing Information**

Information about actions of the archivist, custodians or creators of the records or conventions in the finding aid that may have an impact on a researcher's interpretation of the records, or understanding of the information provided in the finding aid. Actions and conventions including construction of provenance, maintenance, alteration of original order, devising titles for materials, weeding, maintenance of control or container numbers. Also notes about where the collection is in the process of sorting and organization.

- **Preferred Citation**

This is where you indicate the preferred style for the citation of the collection being described.

This usually follows the standard of:

Name of Collection, (Collection #), Holding Institution Name, Location of Institution.

Travel Ephemera Collection, (BM-MSS 015). Barnum Museum, Bridgeport, Connecticut.

Or

Roger Minott Sherman Papers, (MS 2). Fairfield Museum and History Center, Fairfield, Connecticut.

## **SUBJECTS**

- Enter genres, subjects, and topics here that describe the Collection. Refer to Lists of Vocabularies section in the appendix manual for more details about managing subjects and keywords.

Thesauri included are:

- Getty Art and Architecture Thesaurus
- Getty Union List of Artist Names
- Getty Thesaurus of Geographic Names
- Library of Congress Subject Headings
- Library of Congress Name Authority File
- Library of Congress Thesaurus of Graphic Materials
- Legacy Nomenclature

## **RELATIONSHIPS**

Create, view and edit Relationships between the Collection as a whole and Entities, Objects, Lots, and Locations.

- **Related entities**

Individuals or companies related to your collection. You can select from an existing entity within your database, or you can create a new one. Types of relationships in this field include: collected by; created by; donated by; and is related to.

- **Related objects**

Create Object Relationships to add Objects to your Collection. Objects could include any object record items that are a part of the collection (for a physical collection) or relate to a 'virtual' collection through topic. To define this hierarchical relationship, simply choose "contains" from the relationship selector (the Collection "contains" your chosen record).

- Related lot

Any lots related to your collection. Type is 'contains' by default.

- Related storage locations

The physical location of the collection through the Location Hierarchy.

## **ADMIN**

- Record Status

The status of the records, choices include: completed, editing complete, editing in process, new, review in progress. This is useful when several people are working on a collection, and you would like to be able to track which level the record is at in processing.

- Access

Indicates if collections information is accessible to the public or not. [Same field as under Identity Elements. Included here for ease of access when checking status of a record.]

## **SUMMARY**

This is where you can pull together selected fields for you collection, usually your Collection Finding Aid. Reports can be downloaded as PDFs from here.

Other reports can be created through Manage>My displays as needed.

## **LOG**

Tracks all changes associated with the record.

## **CLICK SAVE**

A record **MUST BE SAVED FIRST** to activate the left-side local navigation tabs when creating a record; it is recommended so save often while working on catalog records to ensure there is no disruption in data entry. The system will remind you to Save prior to being able to navigate away from a page.



## Storage Locations

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

## Storage Locations Search and Hierarchy Page

Selecting either “New > Storage Location” or “Find>Storage Location” will open the Storage Location search and hierarchy page. (Figure 26)

When searching, any search results will appear below the hierarchy viewer with the number of results.

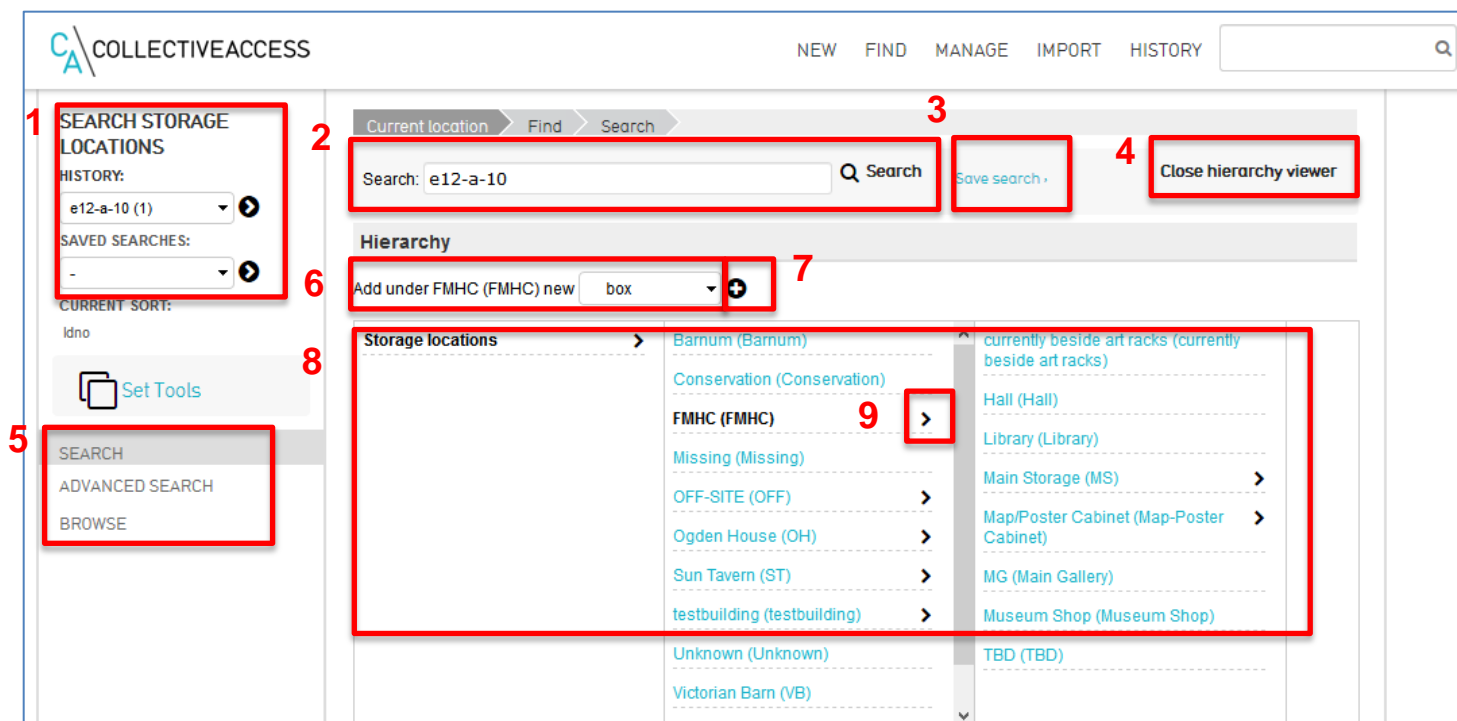


Figure 26

### 1. Search Options

Contains drop-down menus that allow you to access your saved searches and search history. This section changes depending on if you are on the Basic, Advanced or Browsing pages [see #5].

### 2. Search Bar

Allows you to search for storage locations by name or keyword. Search results appear below the hierarchy viewer; clicking on the hierarchical link shows you the location in the hierarchy. Clicking on the specific location will take you to the location's worksheet.

### 3. Save Search Button

Saves the results of a search. Saved searches can be viewed through Local Navigation menu, through the Manage>My Search Tools on the menu.

### 4. Close/Open Hierarchy Viewer

Closes or opens the hierarchy viewer.

## 5. Local Navigation

Allows you to switch between Search, Advanced Search and Browse.

## 6. Add Storage Location Drop Down Menu

Allows you to select the type of storage location to be created – either a building, room, unit, etc. (See Figure 27)

The containing location is selected by clicking on it in the hierarchy viewer.

*NOTE: Be sure that the location you want to edit is what is selected.*

## 7. Add Storage Location Button +

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

## 8. 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.

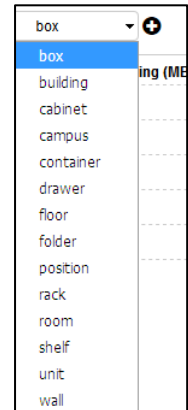


Figure 27

## 9. Edit Storage Location Button

Click on the arrow to view the locations below that location. (Click on the actual location name to get to that location's worksheet.)

## Adding a New Storage Location

Adding a new storage location can be done from the Global Navigation Bar. Click or mouse-over the New tab in the Global Navigation Bar and choose Storage Location in the dropdown menu to open the Hierarchy/Storage Location Editor. (Unlike other sections, there are no additional choices from here, you will be sent to the Location Editor.)

To add a new location, first select the place you are adding the new location. Select the type of location you are adding from the drop down menu, and click on the + to the right of the menu to open the storage location worksheet. (Figure 28)

The Storage Location Worksheet is very similar to the other worksheets, and contains the following screens that receive information about your Collection:

- Basic Info
- Contents (this replaces the "Relationships" screen)
- Summary
- Log

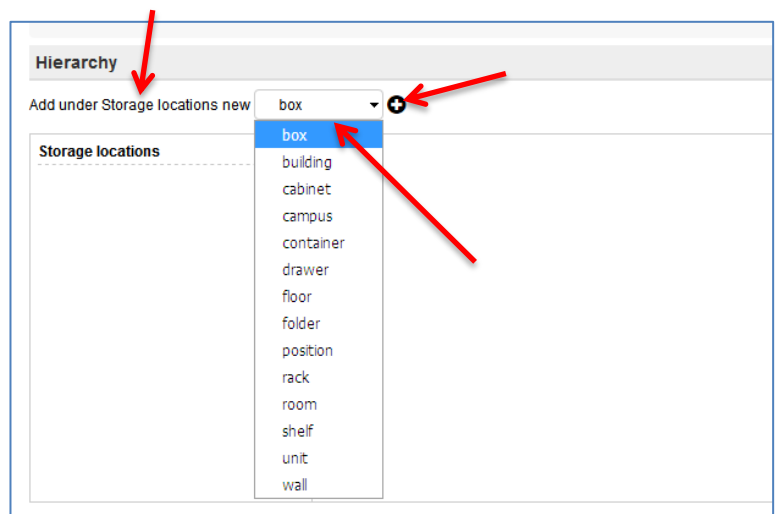


Figure 28

## BASIC INFO

### Location in hierarchy

This will initially show up as uneditable light blue text (Figure 29), and options at the right will be gray until you enter a name, and click Save.

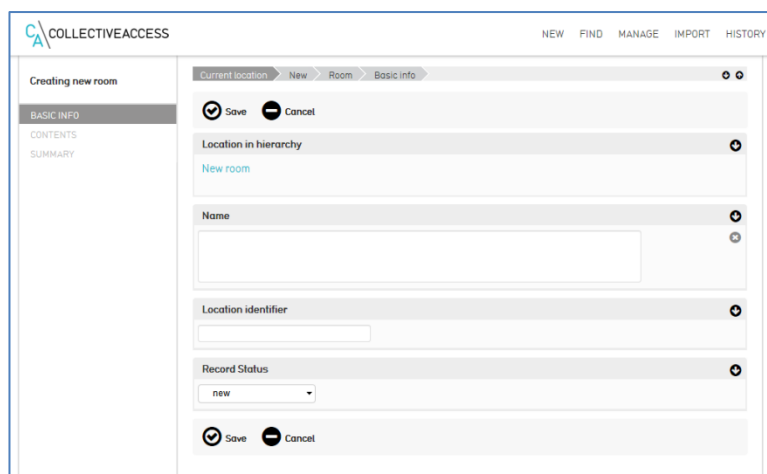


Figure 29

Once saved, this will show you the selected location's place in the hierarchy. (Figure 30) Those locations can be Moved, or Added to from here. The sheet options on the left will now be 'unlocked'.

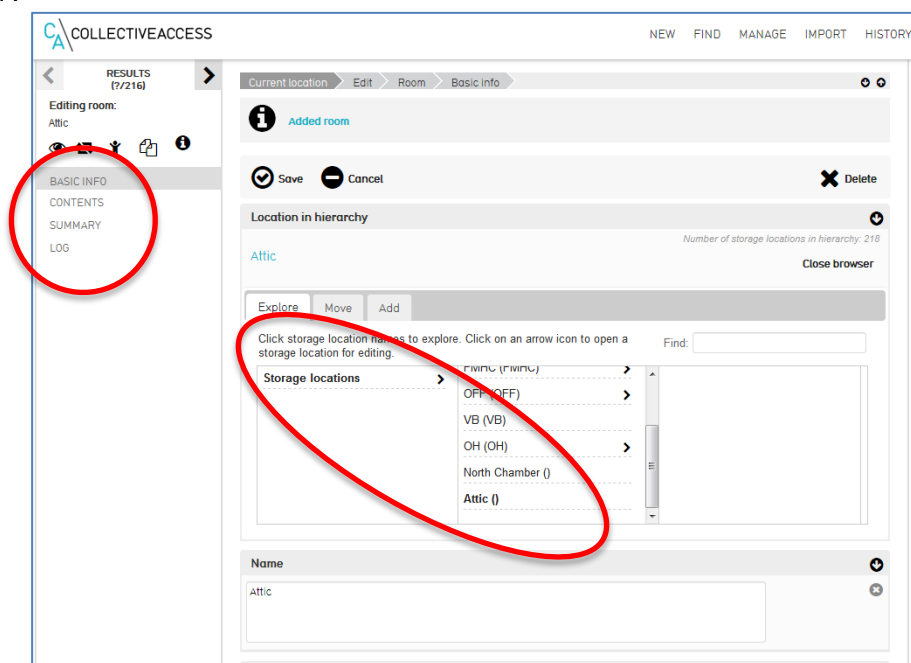


Figure 30

*Note: To hide the hierarchy box, click on Close browser at the right of this section; to view the hierarchy again, click Show Hierarchy*

### Name

The full name of your location. Such as "Main Storage".

**Location identifier.**

A shortened version of the location name, such as “MS” for “Main Storage”. You can keep the full name here if you’d like, but it will make for a long location name string.

**Record Status**

Select from the drop down whether this location is New, Editing in Progress, etc.

## CONTENTS

This screen is similar to the Relationships page in other modules, where you can add, delete and view the Objects located at your particular Storage site.

This will only show you a list of the objects by Title, and if it is in a permanent location or temporary location. To go to a particular object, click on the linked Title.

You can add an object to a location from here by clicking the ➕ Add relationship.

## SUMMARY

This will give you a Summary of the location. There are two canned locations available. You can create your own Custom Displays through Manage.

## LOG

Summary of this record and any edits or changes from the time it was created.

*NOTE: When you are creating locations, they will not currently automatically sort alphanumerically.*

## MOVING A STORAGE LOCATION

You will most likely encounter a time when you will need to “move” a storage location. Whether it is during a data migration clean-up, or you decide that you are moving a Box to a different location, this will involve a Move. **NOTE: any object related to a location WILL move with the location.**

When you Move a location, the system DOES NOT have a way to automatically put something back to a previous location.

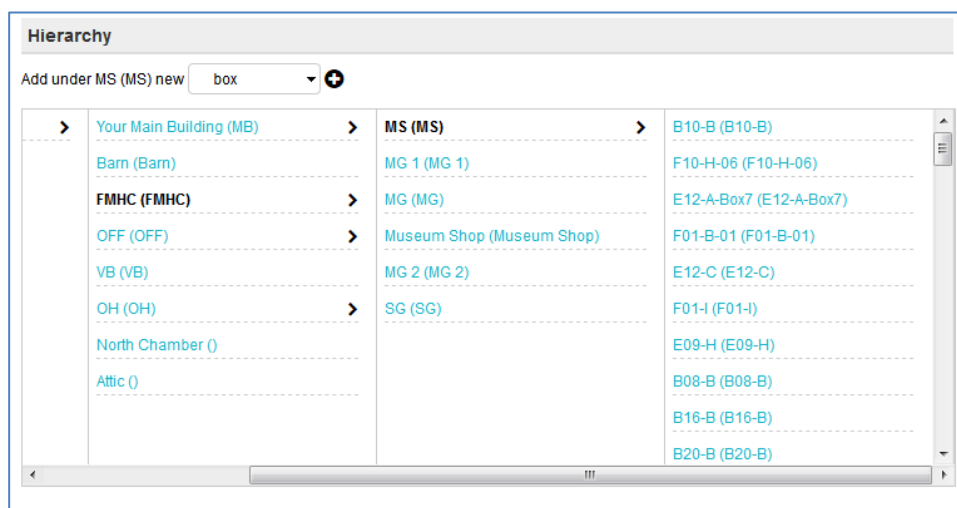


Figure 31

In this hierarchy example (Figure 31), there is MS (main storage in this case), and below that any of the other locations that would normally be subdivided into groups by A, B, C, D, etc. are all mixed together. For ease of use in this case, we want to group them together under their position.

Begin by being sure you have selected the correction section you want to edit/move/add to. The selection will be in bold, and it will show up under “Add under” next to the pull down. Once you are sure the correct area is select, and you’ve selected the desired type – in this case “position”, then click the **+**. (Figure 32)

Hierarchy			
Add under <b>MS (MS) new</b> position <b>+</b>			
>	Your Main Building (MB)	<b>MS (MS)</b>	>
	Barn (Barn)	MG 1 (MG 1)	
	<b>FMHC (FMHC)</b>	MG (MG)	
	OFF (OFF)	Museum Shop (Museum Shop)	
	VB (VB)	MG 2 (MG 2)	
	OH (OH)	SG (SG)	
	North Chamber ()		
	Attic ()		

Figure 32

We’ve Named this ‘F Range’ and made the Location identifier MS-F. Click Save.

☒ Save ☐ Cancel

**Location in hierarchy**

FMHC → MS → New position

**Name**

F Range

**Location identifier**

MS-F

**Record Status**

new

Figure 33

Once you’ve saved, it will now look like this (Figure 33):

**Location in hierarchy**

FMHC → MS → F Range

Number of storage locations in hierarchy: 219

Close browser

Explore Move Add

Click storage location names to explore. Click on an arrow icon to open a storage location for editing.

Find:

MS (MS)	E08-B (E08-B)
MG 1 (MG 1)	B13-C (B13-C)
MG (MG)	B01-M (B01-M)
Museum Shop (Museum Shop)	F02 (MS-F02)
MG 2 (MG 2)	<b>F Range (MS-F)</b>
SG (SG)	

**Name**

F Range

**Location identifier**

MS-F

Now to organize the other locations, you will want to be in the Location editor (Figure 34), and use the Tabs at the top of the hierarchy window.

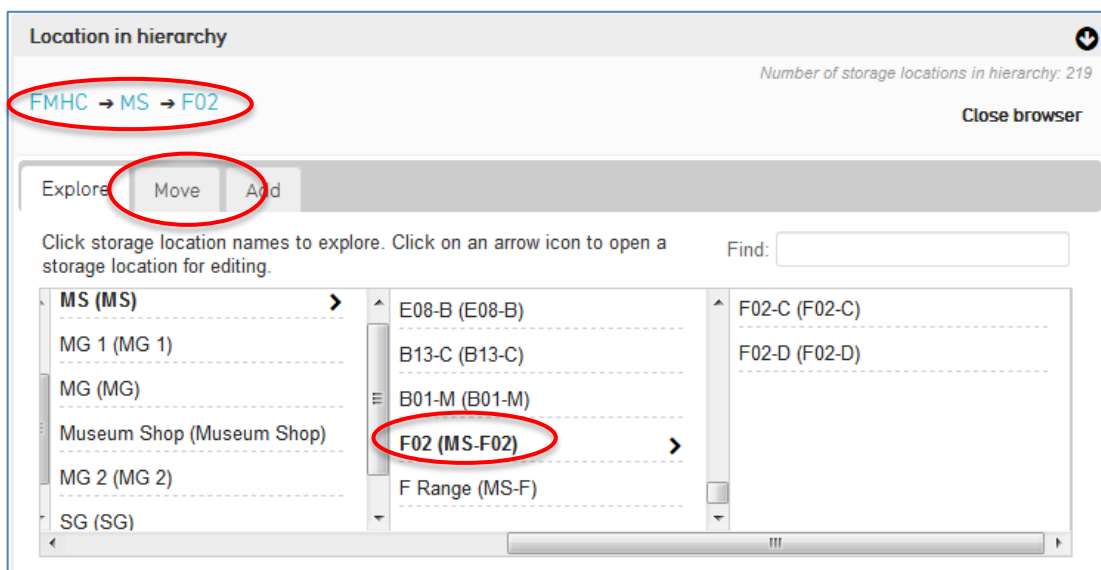


Figure 34

Be sure that the location you want to move is selected and appears in **bold**.

Click Move on the tab. It will then ask you to select the section you want to move it to – in this case we are moving to “F Range”. Once that is selected (note it becomes bold), then a message will appear in red (Figure 35) that your original selection “Will be moved under F Range (MS-F) after next save.” – this is make sure this is where you want to go, and to remind you to click Save.

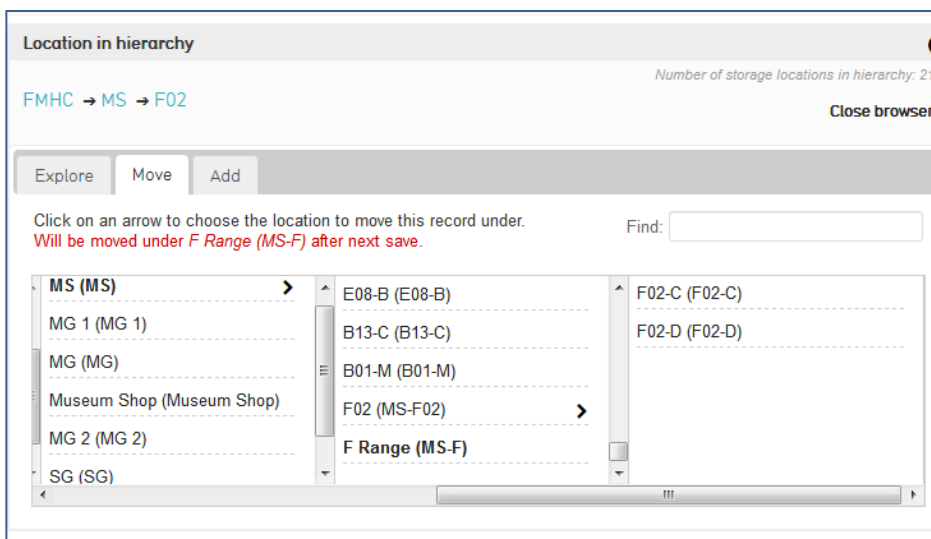


Figure 35

Now F02 is nested below F Range in the Location Hierarchy. (Figure 36) Note: the locations that were under the original F02 have been moved along with that location, keeping that hierarchy. Repeat this process until your locations are organized that way you want them.

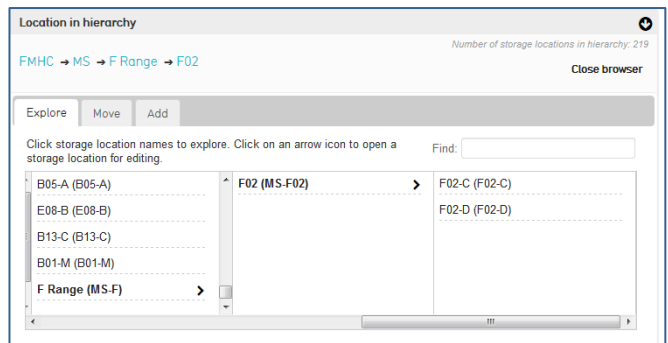


Figure 36



## LOTS

Lots are the way to catalog administrative information about Items entering your collection as part of the permanent collection or under consideration for the permanent collection. You can link both Objects and Collections to Lots. Along with general information, you can track information about the entire group, such as whether the Deed of Gift has been sent, and if it has been signed. You do not have to use the lots if your institution does not have this information, but it is useful for an overview of the status of an accession group.

## NAVIGATION

### To Create a New Lot

Click or mouse-over the New tab in the Global Navigation Bar.

Choose Lot in the dropdown menu to open the Object Lot Editor.

Select the Type (Bequest, Found in collection, Gift, Purchase, Transfer) from the Drop Down. (See Figure 37)

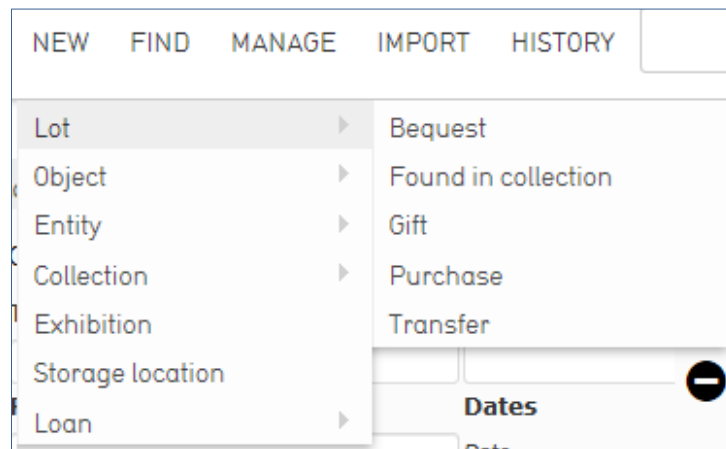


Figure 37

## SCREENS

The Object Lot Editor contains the following screens that receive information about your Lot.

*NOTE: You must click SAVE before the screens listed at left are available.*

- Basic Info
- Contents
- Admin Info
- Summary
- Log

## CATALOGING:

### BASIC INFO

This screen contains the basic overall information about your Lot.

#### Accession Title

This can be a collection or group title, or this could be the number assigned to this Lot.

## Accession number

Assign a unique alphanumeric accession number for your incoming group of items. (i.e.: If you use the tri-part numbering system, you would use the year and lot number only, 2018.100)

If you are tracking a potential incoming Lot, and have not yet accessioned it, you can assign a temporary number. You can either follow any of your internal tracking numbers, or use something such as TR.150 (TR for Temporary Receipt), or even just a T for Temporary.

## Dates

Enter a Date and then choose the Type from the pull-down at the right. (See Figure 38)  
Choices include: Date accessioned, Date appraised, Date cataloged, Date inventoried, Date received.

The most common (and probably the most important) date to track is Date accessioned. If you have more than one date available to track, click on the ➕ Add Dates to add as many as you need.

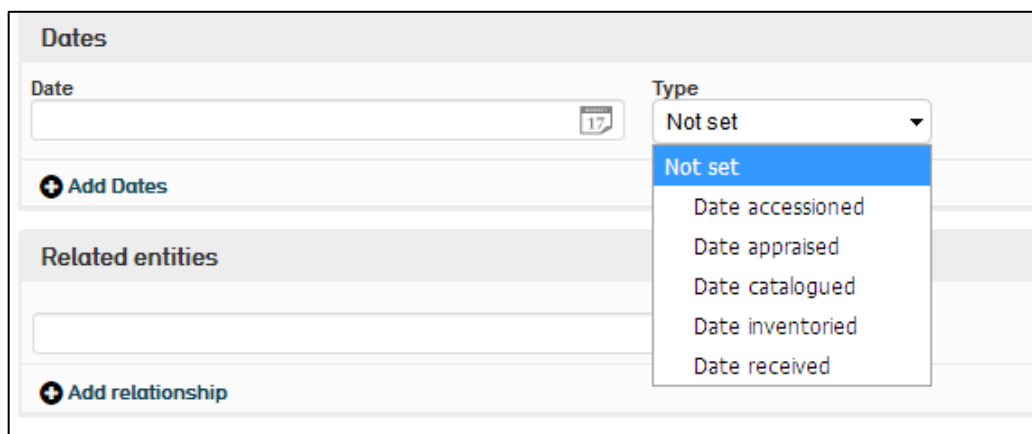


Figure 38

## Related entities

This is a Lookup field for Entities related to your Lot. This links directly to the Entities module, and cross-references, so you do not have to link again from Entities to Lot.

After you select or create your entity, you can choose the Type of relationship from the pull-down. These choices differ slightly from the Objects module, and choices include: accessioned by, contact, donated by, received by, and received from. (See Figure 39)




Figure 39

**Credit line**

Enter Credit line text for your Lot – this should be where the official credit line agreed on by the donor and the institution is recorded. Usually something similar to “Gift of Samuel Adams”, or “Gift of the Lacey family”. Any individual records created from this lot should have this credit line.

**Curatorial Description**

Enter a description of your Lot. As this is not a record that will be seen by the public, it is whatever information will be most useful to you. You could use this for a simple list of items in the lot, or where the donation came from and why it's of interest.

**Deed of gift sent? (if lot is a gift)**

Check box to denote if the Deed has been sent

**Deed of gift signed? (if lot is a gift)**

Check box to mark if the Deed has been signed and returned

**Instructions**

Enter any instructions regarding the lot, whether it related to the donor, or to next steps in processing the collection

**Price (if Lot is a purchase)**

Enter the price paid for the lot here.

**Restrictions**

Any related Restrictions on the collection as designated by staff or by the donor. It is generally not a good idea to accept restrictions on gifts, but may be applicable in cases like a diary by a living person who would like access restricted for a given number of years.

**Notes**

Enter any additional Notes about your Object Lot here if they do not apply to one of the other fields.


**Accession Status**

When creating a new Lot, at the very bottom of the Basic Info screen there is a pull down field to select where the lot is in processing. Choose from accessioned, non-accessioned, pending accession, or potential acquisition.

**CONTENTS**

Objects and/or Collections that are part of a Lot can be viewed here, and existing Objects or Collections added here.

**Related objects**

All of the Related objects will be visible here. Also, if you want to relate an additional existing object to the Lot, you can click on  and type in the Accession number. As you type suggestions will appear. Choose the correct one, and click Save. (You can also search by a title, but the accession number would be more specific.)

## Related collections

All of the Related collections will be visible here. Also, if you want to relate an additional existing collection to the Lot, you can click on **+** and type in the Accession number. As you type suggestions will appear. Choose the correct one, and click Save. (You can also search by the collection name.)

## ADMIN INFO

### Record Status

Use the pull-down to select the status of the lot record. Choices include Completed, Editing Completed, Editing in Progress, New, Review in Progress

### Access

Choose the access level of your Media, whether it is accessible to the public or not.

### Update by (Legacy system)

If you have migrated from an old system, any information about who cataloged information in a record will show up here. This will be automatically generated in the migration.

If you are entering old cataloging records, you could enter the person's information here.

### Updated by

Cataloger's name is entered here. It is a free-text field and doesn't link to Entities.

### Date updated

The date the record was updated.

## SUMMARY

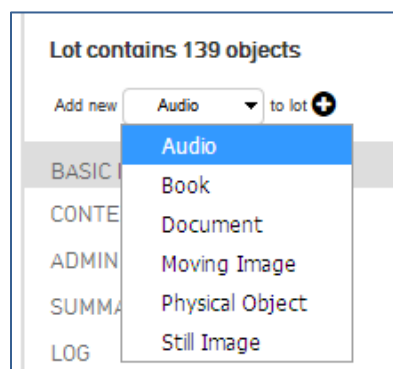
Display view that pulls together information about your accession lot in one place. Includes the Lot number, Related Entities, Credit Line, Dates, Accession Status, Related Objects, Notes, status of the Deed of Gift Signed and Deed of Gift Sent, also Source, and the CollectiveAccessID [internal system number]

This display can be customized to what the user needs by creating Custom Displays in Manage>My Displays.

## LOG

Tracks all changes associated with that record.

### To create New related objects from a Lot.



At the left, you will see how many object are related to the lot. If you want to create a NEW object (not just link an existing record), click on the Pull-down next to Add new, and make your selection. Once you have picked a type, then click the **+** to create the record. (Figure 40) You will get a new object record that will be the same as if you were creating it on its own, but it will be linked to the Lot, and the Object identifier will already be filled in from the Lot record. Follow the same steps as a new Object record.

Figure 40

## SEARCHING FOR RECORDS

There are four ways to search for records in CollectiveAccess: Find, Browse, Advanced Search, and QuickSearch. The following sections will go through how each type of search method works and how to manage them.

### QUICKSEARCH

QuickSearch is what it sounds like: a quick way to search all the records in your collection. This type of search runs a full-text query across the entire database, and organizes results according to Primary Types (Objects, Entities, Places, Occurrences, and Collections, Storage Locations and Object Lots).


The QuickSearch tab is located on the right side of the Global Navigation bar. (Figure 41). Enter a keyword or phrase, and click Enter or  search.



Figure 41

Results will display for all the records containing that keyword or phrase. Records are organized by Primary Type (Objects, Entities, Occurrences [Exhibitions], Collections, Object Lots, Storage Locations and Loans), with the number of records retrieved listed next to the heading for each Type (Figure 42). If the number is 100, that means the results are greater than 100 records.

Click on the hamburger symbol  or [Full Results](#) at far right to get all the results.

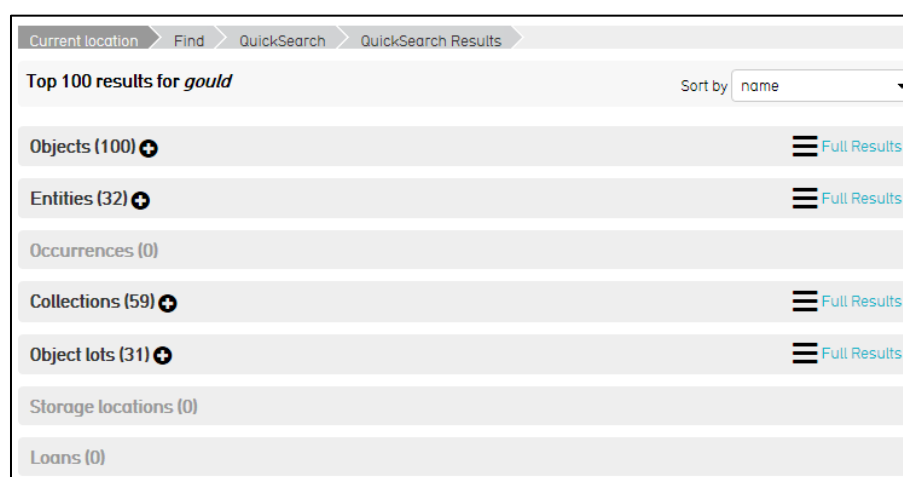
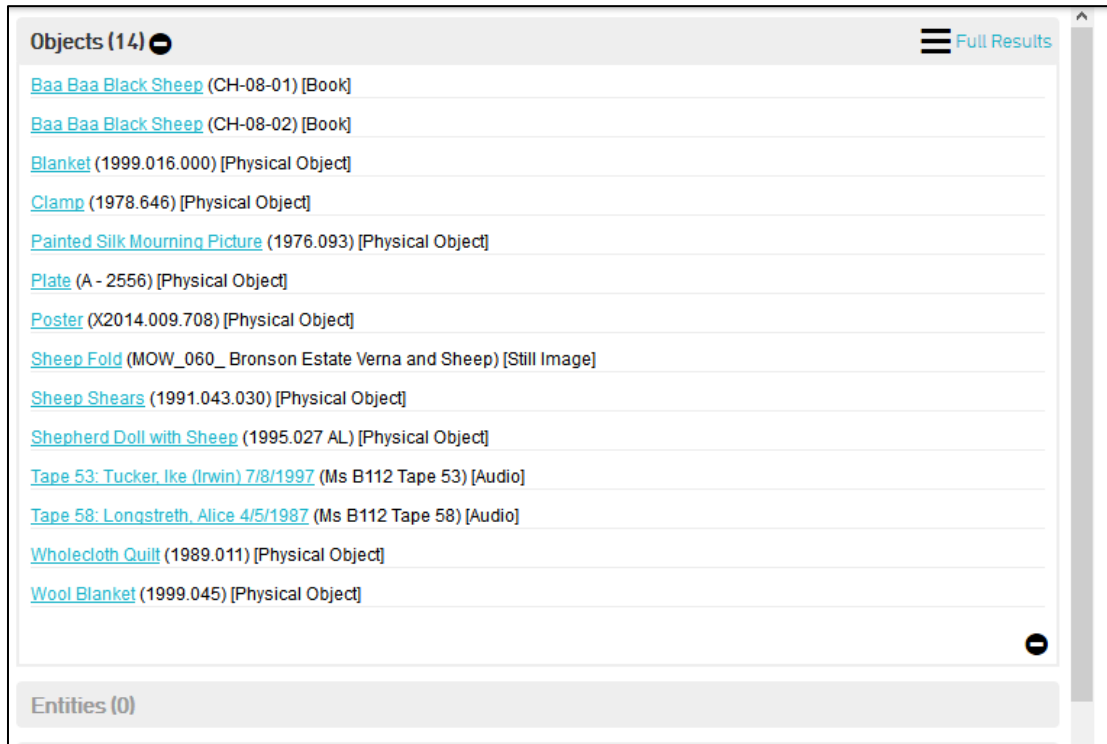




Figure 42

Each record is listed with its Title and Identifier. (See Figure 43) To view the full record for a result, click on the hyperlinked Title. To return to your search results from a record, click on the RESULTS link in the upper left-hand corner of the Inspector. Results can also be sorted by Name and Identifier (displays as “Idno”) by selecting an option from the Sort by dropdown menu in the Control Bar.



Objects (14) 		 Full Results
<a href="#">Baa Baa Black Sheep</a>	(CH-08-01) [Book]	
<a href="#">Baa Baa Black Sheep</a>	(CH-08-02) [Book]	
<a href="#">Blanket</a>	(1999.016.000) [Physical Object]	
<a href="#">Clamp</a>	(1978.646) [Physical Object]	
<a href="#">Painted Silk Mourning Picture</a>	(1976.093) [Physical Object]	
<a href="#">Plate (A - 2556)</a>	[Physical Object]	
<a href="#">Poster (X2014.009.708)</a>	[Physical Object]	
<a href="#">Sheep Fold</a>	(MOW_060_ Bronson Estate Verna and Sheep) [Still Image]	
<a href="#">Sheep Shears</a>	(1991.043.030) [Physical Object]	
<a href="#">Shepherd Doll with Sheep</a>	(1995.027 AL) [Physical Object]	
<a href="#">Tape 53: Tucker, Ike (Irwin) 7/8/1997</a>	(Ms B112 Tape 53) [Audio]	
<a href="#">Tape 58: Longstreth, Alice 4/5/1987</a>	(Ms B112 Tape 58) [Audio]	
<a href="#">Wholecloth Quilt</a>	(1989.011) [Physical Object]	
<a href="#">Wool Blanket</a>	(1999.045) [Physical Object]	

Entities (0)

Figure 43

## BASIC SEARCH USING FIND

Using Find allows for a targeted search for records of a known Primary Type (Objects, Entities, Places, Collections, Exhibitions). It provides a little more control than a QuickSearch.

The Find option is the second tab of the Global Navigation bar. Click or mouse-over the Find tab to activate the dropdown menu (Figure 44).

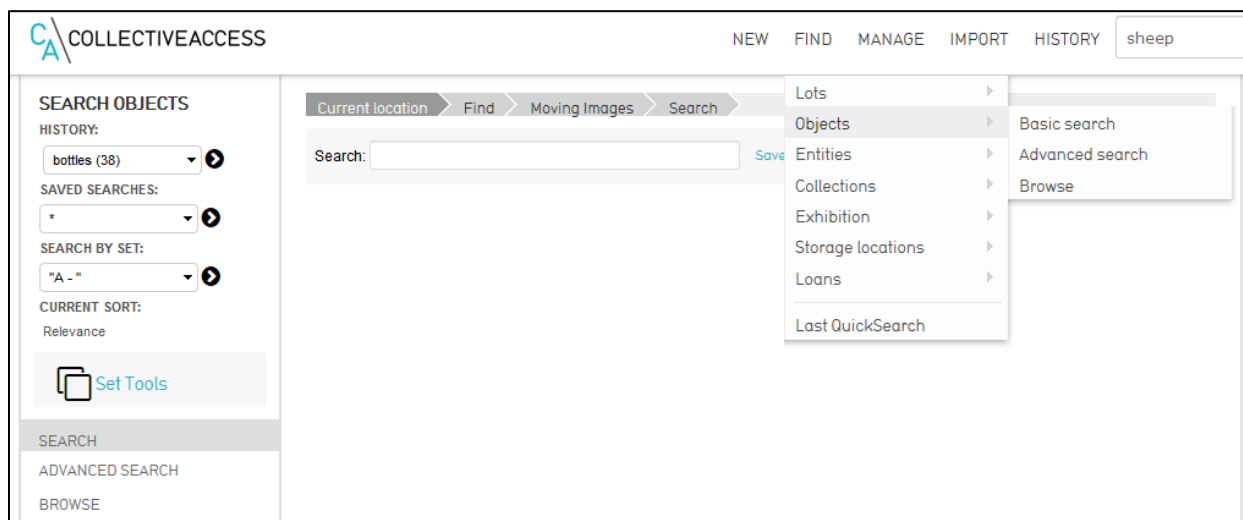



Figure 44

Next select a Primary Type from the dropdown menu. For example: if the record you are looking for is an Object, select Objects; if you are looking for a person, select Entities, and so on. Once the Type is selected, the results for the last search performed will automatically display. Clicking on the Find screen will open a Basic Search by default. If another search type (browse, advanced search) is open, select Search from the Local Navigation column. To run a new search, type a keyword, phrase or search-string into the search field and click the Search button in the Control Bar. Results will display with an image (if available), title, and identifier.

There are several sorting options to better view your search results:

- Sorting by relevance, title, type and identifier (idno)
- Selecting how many results will display per page
- Choosing a layout for your results (thumbnail, full or list)
- Choosing a default or custom display for your results
- Options also exist to export your search results as printed labels or as a delimited file for use in Excel and other programs (See Appendix)

To select a record, click on its image or hyperlinked identifier if the search is in tiled layout. If the search is in full layout, the image, identifier, or the Edit > link will open the record.

The list layout includes an Edit icon  that will take you to the full record. To return to your search results from a record, click on the RESULTS link at the top of the Inspector.

## **ADVANCED SEARCH IN FIND**

The Advanced Search function in CollectiveAccess gives you the ability to create as many customized search forms as needed for a project. It is possible create complex cross-table search forms, simple forms to access unique data, or a general-purpose form for any collection management project. (See Appendix for instructions for creating an Advanced Search form.)

### **Using an existing Advanced Search form**

Hover your mouse over the Find tab in upper right global navigation and select a Type (objects, entities, places, etc) to open the Find page.

Click on the Advanced Search option in the Local Navigation column.

First select which Form you would like to use from the dropdown menu in the upper right corner. There you will see all the advanced search forms in your system.

Click on the desired form.

Enter your search terms in the appropriate fields and click Search to run the query.

Results will display below the search form. Click on Hide search form > to collapse the form for easy viewing of search results. Click on Show search form > to return to the form.

## **BROWSE**

The Find interface also includes a Browse search utility. This is the third Search option in the local navigation bar after Basic Search and Advanced Search. Browse is a method for viewing all records in the database and allows you to sort and filter records based on designated attributes.

Click or mouse-over the Find tab in the Global Navigation and select a Primary Type.

Select the Browse option from the Local Navigation bar.

Choose from a selection of information types provided in the dropdown menu. For example, Browse by: type.

This activates the Browse window that displays all objects records according to your specified attribute.

Adjusting how your records are grouped in the Browse window. The Group by menu in the upper right hand corner provides viewing options for your results.

Select a term from the Browse window, and all objects related to that term will display. If your Browse can be further refined by another attribute, a second drop-down menu of applicable terms will display in the Control Bar. Repeat the above steps to further refine your Browse.

To Modify your Browse terms, click the [X] symbol to remove the attribute and select a new one from the dropdown menu

When no more applicable terms exist to refine your search, you can click Start Over to begin a new Browse

Click on an object's identifier to go to the full record. The <- RESULTS -> link in the upper-left hand corner allows you to navigate your Browse results. Click the arrows for the next and previous records, or click the word Results to return to the full list.

### **TIPS: Getting the most from your search**

Basic and Advanced Searches in CollectiveAccess support Boolean operators and wildcards. To use Boolean operators, simply add the following terms (in all caps) along with your search terms.

Boolean operators



AND – narrows the search to only records that includes the two terms that are separated by the AND.

OR – broadens the search by retrieving records that contain either terms separated by the OR.

NOT – narrows the search by eliminating a term from a search.

() – parenthesis combine phrases to be searched together.

“search term” – quotation marks combine terms to create a phrase.

### **Wildcard**

Using \* [asterisk] will search for truncated terms.

Example: “tree\*” will search for “tree” and “trees”

### **EXAMPLES:**

“George Washington” AND “riding horse\*”

Searches for only records containing the terms “George Washington” and “riding horse” or “riding horses.”

Warhol NOT “Marilyn Monroe” searches for all records relating to Warhol that do not contain the terms “Marilyn Monroe.”

Mondrian OR Malevich

Searches for records that contain either Mondrian or Malevich in their records

Warhol AND (“tomato soup” or “Brillo box”)

Searches for all records containing Warhol with either tomato soup or Brillo box in the record.

## SETS

Connecticut Collections allows you to create unique Sets to organize and manage your 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 collections.

Through Sets you can curate possible content for an exhibition, manage cataloging workflows, group objects together for really any kind of purpose. Many organizations use Sets informally as a simple "shopping cart" for planning and brainstorming. They are also used to design online exhibits for viewing by the public on the public website.

Under the Admin Info page, there is a Related set section that lists the Sets that your Object belongs to, if any. (Figure 45) Initially, this screen displays all of your existing Sets in a dropdown menu. If you have not created any Sets, this section will be blank.

The screenshot shows the 'Editing Physical Object' interface. On the left, a sidebar lists navigation options: RESULTS (13/35), Editing Physical Object, Part of lot: 1974.029, BASIC INFORMATION, PHYSICAL CHARACTERISTICS, ARCHEOLOGY, GEOGRAPHY, CULTURE/STYLE, VALUATION, PROVENANCE AND RIGHTS, CONDITION, SUBJECTS, MEDIA, RELATIONSHIPS, LOCATION, ADMIN INFO, and SUMMARY. The main content area is titled 'Editing Physical Object' and shows a thumbnail of a dress. Below the thumbnail, it says 'Part of lot: 1974.029'. The right side of the form contains several sections: 'Collection source' with a dropdown menu set to 'Fairfield Museum and History Center'; 'Object status' with checkboxes for 'accessioned', 'conservation lab', 'for consideration', 'missing', 'off-site', 'on exhibit', 'on loan', 'pending accession', and 'to deaccession'; 'Record Status' with a dropdown menu set to 'new'; 'Access' with a dropdown menu set to 'not accessible to public'; 'Related sets' with a 'Sort by' dropdown set to 'Relevance' and a list of existing sets: 'all physical objects (all physical objects)', 'Flapper Fashion (Flapper Fashion)', 'Flapper grant objects (Flapper grant objects)', and 'Objects with media (Objects with media)'; and 'Deaccession status' with a checkbox for 'Deaccessioned?'. At the top right of the form, there are buttons for 'Save', 'Save and return', 'Cancel', and 'Delete'.

Figure 45

## Create a New Set

There are a couple different ways to create a set. The more straightforward way is to do it after a search, when you have a set of results.

At the left under Search Objects (Figure 46), there is a Set Tools option.

Once you click on Set Tools, it will expand to either create a new Set, or add results to an existing set.

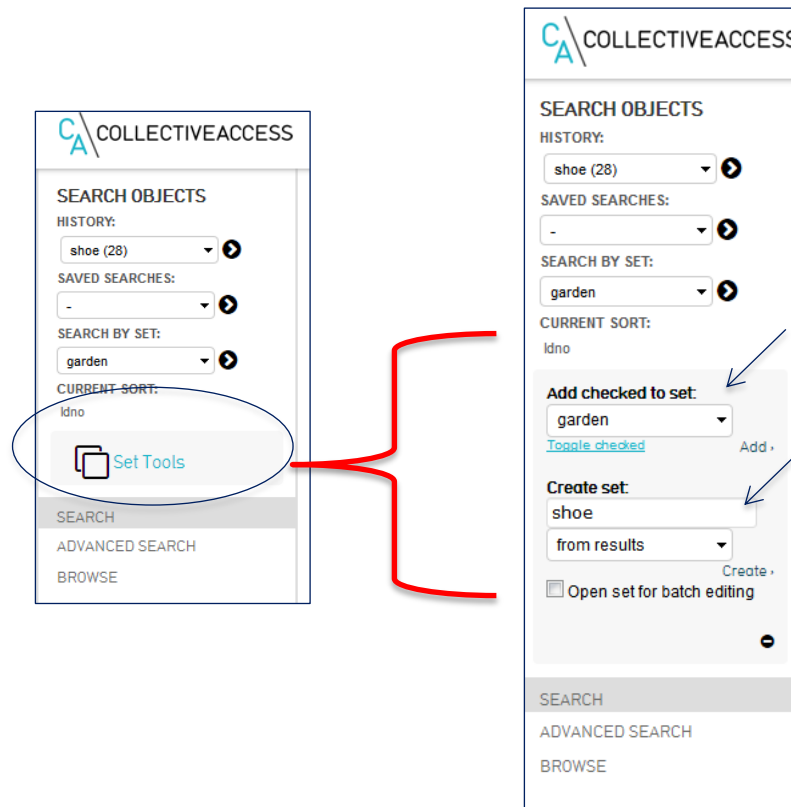


Figure 46

Once you have opened the Set assistant, small checkboxes will appear in your results list. If you are adding to an existing set, choose the existing set from the Add checked to set: pull-down. Check the items you want to add, then click Add.

If you are creating a new Set, the set name automatically defaults to the search term you used. You can change this name if desired. Below the name field, is an option to create the set “from results” or “from checked”. Check the items you want to add, then click Create.

*Note: If you want to batch edit the set once you create it, check off “Open set for batch editing” before creating the set. Once the set is created, the batch editor will open from there.*

## See Appendix for Batch editing.


The other option to create a set is to do it through **Manage**.



### Create a New Set

- Go to **Manage > My Sets** in the Global Navigation and click on All Sets to get to the Set editor.
- Select the type of Set you would like to create:

Public presentation – will publish to the Connecticut Collections public portal

User set – creates a set only for use in your institution

- Select the Set Content – what types of records you want to add to this set. (Object, entities, etc.) and click 
  - Add records to the set by entering either the Title or Identifier of a record in the “Add object to set” lookup.
    - Click on the desired record from the results
    - The record will automatically be added to the set
    - Click the **X** inside the record to remove it from the set (See Figure 12) To assign your Object to a Set, select the desired Set from the dropdown menu.
  - You will have to Add an item and Save to be able to edit the rest of the set.
  - Click SAVE  
Now you will be able to access Basic Info at the left, to add a Title and fill in any other fields, including User and Group Access.
  - Enter a Title for the Set
  - The Set Code is a unique identifier that will distinguish this set in the database, and has been generated automatically, but this can be edited to something more easily read if you desire.
  - Enter an Introduction (if needed for a public display)
  - Set the Access level (accessible to the public or not accessible to the public)
  - Set the Status level (New, Editing in progress, etc.)
- Click SAVE to apply your changes.

If you wish to make changes to the Set you selected, from the main list, click the Edit  icon to navigate to the Set Editor menu. The editor can also be accessed by clicking or mousing over Manage in the Global Navigation bar and selecting My Sets. Clicking  will remove your Object from that Set.

*NOTE: Related sets also appears in the ADMIN INFO page of the Objects. You can add the object to a set from here by searching for a set, selecting and saving. It is best to have a Set exist rather than to try to create one from here however.*

# APPENDIX

## GLOSSARY

The language used in Connecticut Collections is a combination of traditional cataloging terminology and unique CollectiveAccess vocabulary. Visit the wiki (<http://wiki.collectiveaccess.org/>) for continually updated terms in the glossary. Below is a general list of terms used in this manual.

Advanced Search	A query tool that allow searching multiple fields across tables from a single form. Unlike common advanced search options that limit how and what can be searched, CollectiveAccess advanced search forms can be customized using the Advanced Search Form Builder, and there is no limit as to how many different forms can be specified and used within the system.
Browse	A faceted method of searching that filters results by selected types.
Find	A targeted search based on Primary Types (See Primary Types).
Georeferencing	Adding geographic metadata to your records through direct entry of latitude and longitude values or upload of KML/KMZ files, usually created in a mapping application such as GoogleEarth, containing one or more latitude/longitude pairs.
Groups	Used when creating Advanced Search Forms, Groups allow for multiple elements to be put together into collapsible units that create dynamic yet complex search forms.
Items	The “things” that are being catalog, whether a physical object, organization, person, place, or event.
Metadata element	Also referred to as metadata attributes, these create the data entry fields in your CA database.
Media	The image, sound and video files uploaded and related to an object.
Primary types	Objects, entities, places, collections, and occurrences.
QuickSearch	Searches the entire database very quickly.

Relationships	A link between two records. In CA relationships typically store additional information beyond the basic linkage, including type of relation, source of relations and an optional range of dates for which the relationship existed. For example, a relationship between an object and a person may have a type of “donated” (eg. “person donated object”) or “is depicted by” (eg. “person is depicted by object”), a bibliographic reference as a source and a date range (eg, 1921- 1945) qualifier. Only type is required of all relationships. Relationships are inherently reciprocal (ie is child of/is father to).
Screens	Screens provide the ability to spread metadata elements over multiples pages in the User Interfaces (See User Interface)
Search Forms	Create and control Advanced Search Forms
Subjects	Library of Congress Subject Headings or any other controlled vocabulary used to describe the aboutness of an object, entity, place, or occurrence.
System lists	Lists used within the software whose list item values customize CollectiveAccess for specific uses – dropdown menus, types, etc. These lists can only be created and deleted by the administrator.
User Interface	The places where the interaction between the human cataloger and the CA database occur. These are typically the cataloging Screens. In CA, the User Interface is completely configurable.
Vocabulary lists	Lists used within the software whose list item values are referred to in keyword/subject lookups.

## Subjects

Subject Headings are used as Authorities. What are Authorities?

'An authority record or term is a tool used by librarians and catalogers to establish forms of names (people/organizations), titles, subjects, used in library and museum records. Authority records enable librarians to provide uniform access and to provide clear identification of authors and subject headings. For example, works about "movies," "motion pictures," "cinema," and "films" are all entered under the established subject heading "Motion pictures."

Authority records also provide cross references to lead users to the headings used in the catalog, e.g., a search under: Snodgrass, Quintus Curtius, 1835-1910 will lead users to the authorized form of heading for Mark Twain, i.e., Twain, Mark, 1835-1910.' [Paraphrased from Library of Congress website]

Authorities enable us to employ a common terminology making records more findable. This is particularly important when searching across various institutional collections.

Where one institution may call an event WWI, another may call it World War One. The Library of Congress authority is World War, 1914-1918.

The Subject field aspect of Connecticut Collections can be a little overwhelming as there are so many choices. But this is a good thing.

There is no one thesaurus that will cover every term you need.

There are two main parts to our Subject fields. The main field, and more commonly known, is the Library of Congress. These are the terms that you will normally see in books - there will be at least one, sometimes two or three. (Museum and archival records very often use a lot more!) These cover topics and peoples' and business names. The topics can range from very specific to very broad. Depending on your collection, going with the broad topic is usually better. You can always add additional narrowing topics.

The other main source is from The Getty Research Institute.

"The Getty vocabularies contain structured terminology for art, architecture, decorative arts, archival materials, visual surrogates, conservation, and bibliographic materials. Compliant with international standards, they provide authoritative information for catalogers, researchers, and data providers."

**Getty Art and Architecture Thesaurus** - The AAT contains generic terms; it contains no iconographic subjects and no proper names. That is, each concept is a case of many (a generic thing), not a case of one (a specific thing). For example, the generic term cathedral is in the AAT, but the specific proper name Chartres Cathedral is out of scope for the AAT – you should be able to find this in the Library of Congress Name Authority Files).

<http://www.getty.edu/research/tools/vocabularies/aat/>

**Getty Union List of Artist Names** - The ULAN includes proper names, biographies, related people or corporate bodies, and other information about artists, architects, firms, studios, museums, special collections, patrons, donors, sitters, creating cultures (e.g., unknown Etruscan), and other people and groups involved related to the study of art and architecture. Artists may be either individuals (persons) or groups of individuals working together (corporate bodies). Artists in the ULAN generally represent creators involved in the conception or production of visual arts and architecture; performance artists are included, but typically ULAN does not focus on actors, dancers, or other performing artists. For our purposes, while it is always worthwhile to try a search for a name or group, you may not find your person. ULAN will have someone like nationally known Trumbull, John (American painter, 1756-1843) – but may not have a local artist.

<http://www.getty.edu/research/tools/vocabularies/ulan/index.html>

**Getty Thesaurus of Geographic Names** - CTCO has a Geography component, that will link to a map. This is another way to find a recognized Place Name. While there will be some local names that will show up, you may not get all of them - use the larger area name, and make sure to use the common name in the description. The TGN includes names and associated information about places. Places in TGN include administrative political entities (e.g., cities, nations) and physical features (e.g., mountains, rivers). Information about current and historical places is included.

Library of Congress Subject Headings – General topic headings, usually covering wide range. Dogs, Dwellings, Flowers, Automobiles

<http://authorities.loc.gov/webvoy.htm>

Library of Congress Name Authority File – Accepted names of individuals. Usually including life dates. For instance Twain, Mark, 1835-1910, rather than just Twain, Mark. (Although you might think a person you are searching for won't show up, it doesn't hurt to check.)

<http://www.loc.gov/pictures/collection/tgm/>

Library of Congress Thesaurus of Graphic Materials - Thesaurus for Graphic Materials is a tool for indexing visual materials by subject and by genre/format. The thesaurus includes more than 7,000 subject terms and 650 genre/format terms to index types of photographs, prints, design drawings, ephemera, and other pictures. You can usually find what you need in the AAT, but this may have some more specific terminology if needed.

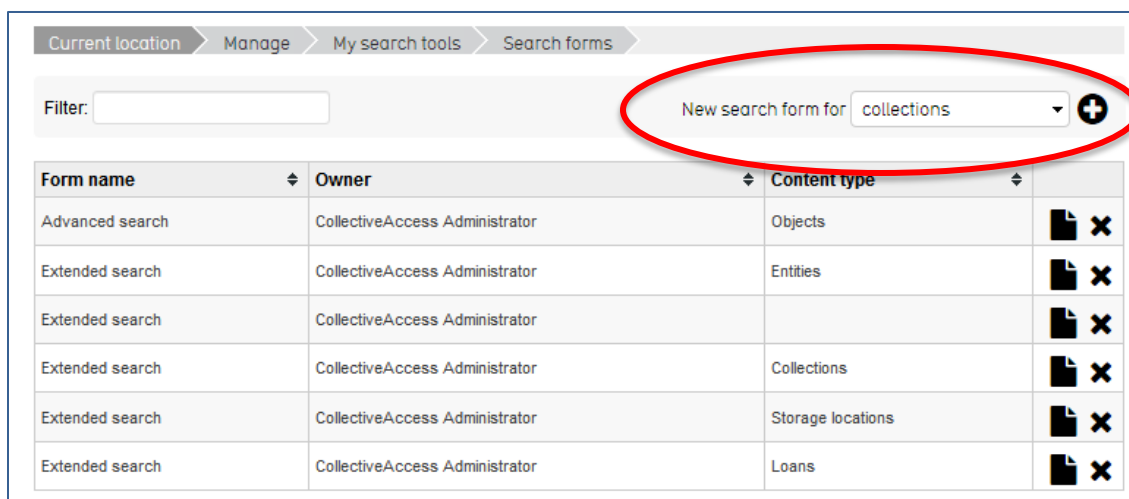
Legacy Nomenclature – any terms that you may have used in any previous databases or spreadsheets will appear there. It may include things like Nomenclature, or original terminology that you created for your own reference. These can be continued to be used, and you can add them to new records, but you may not match up with other institutions.

For all but the **Legacy Nomenclature**, CTCO provides a direct link to the thesauri for you to look up. If you are having issues finding the term that you want, you may want to go directly to one of the authority websites and search there, as you may be able to browse for the exact term you want in more detail. Once you find that term, cut and paste in the CTCO field, and you should come up with what you are looking for. One bug we've found so far, the town of Fairfield does not come up when searching. It does exist, but does not show up in searching. A way to get around this is once you find the term, copy the number associated with it, and paste that into the search box. It'll come right up.



## Creating an Advanced Search Form

Open “My Search Tools” by mousing over the Manage tab in the Global Navigation bar and selecting it from the dropdown menu. This will open all the Advanced Search Forms currently in your system.



Form name	Owner	Content type	
Advanced search	CollectiveAccess Administrator	Objects	
Extended search	CollectiveAccess Administrator	Entities	
Extended search	CollectiveAccess Administrator		
Extended search	CollectiveAccess Administrator	Collections	
Extended search	CollectiveAccess Administrator	Storage locations	
Extended search	CollectiveAccess Administrator	Loans	

To create a new search form, select the type of search you want from the pull-down (collections, entities, objects, etc.) then click on New Form in the Control Bar. This will send you to the “Creating new search from” page.

Enter some basic information about your new Search Form:

Enter a unique Form name for the new Form – something that it will be easy for you to remember which search it is.

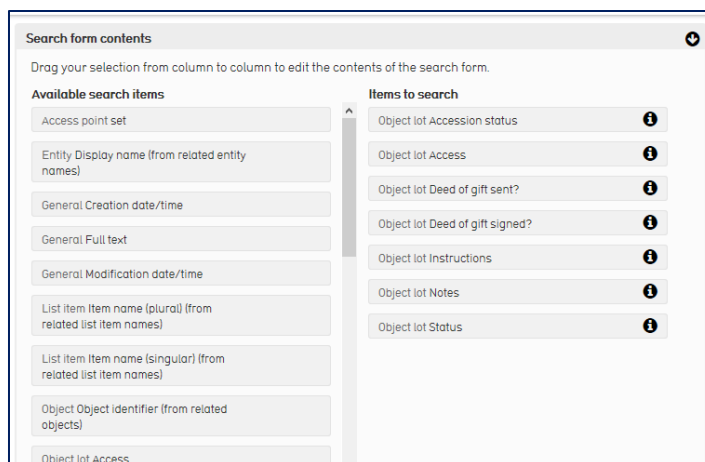
Form code. If you’d like, enter a unique alpha-numeric identifier in the Form code text box, otherwise, when you click Save, a Form code will be automatically generated.

Select Yes or No to label your Form as a System Form. Select Yes if you want the form to be accessed by all users using the system, and select No if only want the user currently signed in to have access to that form. (Specific user access can be configured further down if you’d like to have only specific users have access.)

Click Save to save this information and begin editing Search Form Contents.

You will see two columns: Available search items, and Items to Search. To add the fields that you would like to search to your form, simply click on the field you want in the left side, and drag it over to the right. You can place the fields in the order that you want on the right column as you add them.

Click SAVE once you have added all the fields you require. You will see **Added Search Form** at the top left of your screen and it is now safe to navigate away from



this screen.

You can make additional edits at this point if you choose.

#### Search Form Settings

This asks you to enter the Number of columns that you will see in the finished form. This will depend on how many fields you are adding to the search, and the ease of viewing and using the form.

#### User Access and Group Access


These are handled in the same way. If you have specific users that you would like to be able to access the form you can add them here. Enter their username or full name here and the lookup will give you suggestions as type. Once you select your person, you have the option of what level of access you give them. The choices on the pull-down are Can read and Can edit. Can Read gives them access to use the form, Can Edit gives them access to use the search, and also to edit it if necessary.

For Group access, if you have created a User Group, you can enter the whole group here, rather than adding several individuals separately. (For instance, you have 10 volunteer catalogers, and you want them all to have access, you can create a Volunteer Cataloger group, and just enter that group here.)

#### Editing an Existing Advanced Search Form

Navigation back to Manage > My Search Forms to return to the Search Form List.

To edit any form, click the Edit  icon to open the configuration menu.

You may delete forms from the list by clicking the .

After editing a form, click SAVE before moving to another screen or your changes will not be saved.

## Finding Aids References

Roger Minott Sherman Papers, (MS 2). Fairfield Museum and History Center, Fairfield, Connecticut.

Archival cataloging helps

Extent calculator:

<http://beinecke.library.yale.edu/linear-footage-calculator>

Marquette explanation of citation:

<https://www.marquette.edu/library/archives/citationguide.pdf>