CATALOGING IN *CollectiveAccess*

1.0 INTRODUCTION

About CollectiveAccess

CollectiveAccess is often billed as an open source *collections management software* for museums and archives. However, a more general (and perhaps more accurate) description would be *a highly configurable cataloguing framework.* It can manage information about collections of people or places or events as effectively as it can manage information about collections of objects. As such it is well suited for a wide variety of cataloguing projects beyond collections management.

About this Manual

This manual describes the various components and procedures of *Providence* – the online cataloging interface for CollectiveAccess. Topics covered in the following sections include:

- Definitions of terms
- How the database is structured
- How to create new records
- How to search for existing records
- How to manage and configure the system

Let's get started!

2.0 OVERVIEW OF DATABASE STRUCTURE AND TERMS

Database Structure:

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 fourteen types of entries that model the world that your collection exists in:

Objects	Assets within a collection. Typically these are the physical or born-digital 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.
Places	Physical locations, geographic or otherwise. Places are inherently hierarchical allowing you to nest more specific Place records within broader ones. As with Entities, once a Place is created it can be referred to throughout the system.
Occurrences	Events or "things." An Occurrence is a catch-all term used by CollectiveAccess to refer to contextual items that may require complex cataloguing but are not Entities, Places, Collections or Storage Locations. You can use Occurrences to support structured authorities for virtually any kind of item. Typically, Occurrences are used to support entries for historical events, exhibitions, film productions and bibliographies.
Collections	A defined group of objects. Collections can represent physical collections, symbolic 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 usually 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.
Set items	A record assigned to a Set. Records in a Set can take additional cataloguing, allowing one to contextualize and annotate records within an assigned Set. This enables the construction of Sets where each record contains Set-specific captions and links. This makes Sets and Set Items a great tool for constructing slideshows and tours based on your collection records.
Representations	Media (images, video, audio, PDFs) 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. Like Places, Storage Locations are hierarchical – you can nest Locations to allow notation at any level of specificity (building, room, cabinet, drawer). Each Storage Location can take arbitrarily complex cataloguing, including access restrictions, map coordinates and other information. Storage Locations can be linked to both Objects and Lots, either directly, or through Object Events or Lot Events.
Lists	A simple or hierarchical group of List Items. Lists are used throughout CollectiveAccess in the following contexts: (1) as drop-down lists constraining the values of a field; (2) as controlled vocabularies whose List Items can be associated with Objects, Entities, Places, etc.; and (3) as system lists whose List Item values customize CollectiveAccess for application-level uses. All Lists must be assigned a unique List name, which is used internally to identify your List.
List items	The entries that comprise a List. All List Items have an intrinsic value and an identifier, as well as one or more text labels used for display.
Object events	An event in the life-cycle of an Object. Each Object Event includes a planned date as well and the actual date of occurrence. Different types of Object Events (e.g., conservation events, movement events, loan events) can be recorded by defining Object Event types and assigning appropriate metadata elements for each type.
Lot events	An event in the life-cycle of a Lot. Each Lot Event includes a

	planned date as well and the actual date of occurrence. Different types of Lot Events (e.g., acquisition events, deaccession events) can be recorded by defining Lot Event types and assigning appropriate metadata elements for each type.

Navigation Structure:

CollectiveAccess uses a simple interface so that you can easily navigate between creating, editing and searching for your records. In Figure 1 (below), you will find what a typical screen looks like after a user has chosen to create a new object:

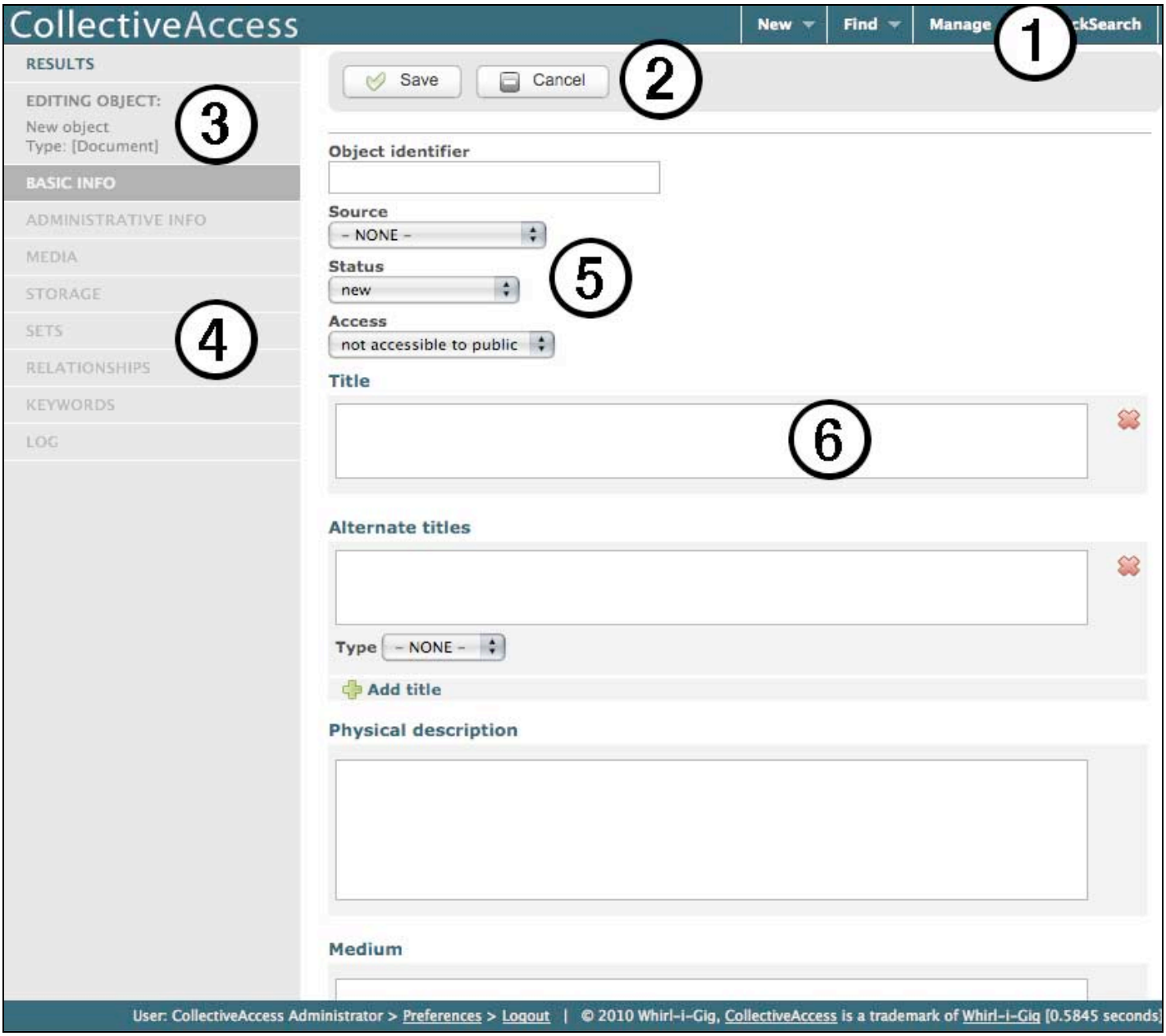

Figure 1

1. GLOBAL NAVIGATION This menu displays the controls that create and find records in the catalog. The global navigation also contains links to your preferences and other configuration tools.

2. CONTROL BAR This bar contains "action items" such as search fields, configuration switches and buttons for saving and deleting records.

3. INSPECTOR This is a configurable display that contains key information and images pertaining to your record. When searching for records, the Inspector provides options for viewing and sorting your results.

4. LOCAL NAVIGATION This menu allows the user to navigate between Screens when editing records and preferences or when performing a search.

5. DROPDOWN MENUS These menus are derived from customizable lists, allowing the user to create a controlled authority for select metadata elements

6. FIELDS These forms 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.

For a complete guide to the vocabulary and terms used in CollectiveAccess, please consult the Glossary in Section 8 of this manual.

3.0 CREATING AND PUBLISHING NEW RECORDS

a. CREATING A NEW ENTITY RECORD

CollectiveAccess supports name authorities. Use the Entities Editor to create a new Entity record, so that all related records will refer to the same Entity.

NAVIGATION

- Click or mouse-over the **NEW** tab in the Global Navigation Bar
- Select **Entities** in the dropdown menu, and choose a **TYPE** (individual/organization) to create a new record in the Entities editor.

SCREENS

The Entities Editor includes four screens that contain the fields that receive information about your new Entity. They are:

- Basic Info
- Contact Info
- Relationships
- Log

CATALOGING:

BASIC INFO

Contains the most basic information to start a new record.

- ***Name [required]***
  - Enter all known information: Prefixes, Forename, Middlename, Surname, Suffixes, and if needed another field for other forenames is available. You can enter a display name if it is different from the Forename and Surname. Otherwise, CollectiveAccess will automatically generate a display name from those elements.
- ***Alternate Name***
  - Enter any alternate names for your Entity.
  - Selecting “Alternates” from the drop-down menu will allow you to identify this name as an alias or second name for the Entity.
  - Selecting “Use For” will allow the system to identify your Entity by this name, but it will never display it as an alternative. For example, if your Entity, Mr. McGillicuddy, is

commonly confused as Mr. McGillicutty, entering this as a "Use For" name will train the system to retrieve the correct record even when the misspelled name is entered.
    - Click the green to enter additional alternate names.
    - If an alternate name is not needed, click the red to remove this field from view
- ***Life Dates***
    - Enter the date range of your Entity's lifetime
- ***Nationality***
    - Enter your Entity's nationality
- ***Biography***
    - Any biographical details that are pertinent to your Entity.
- ***Additional metadata elements***
    - Enter any additional metadata in the appropriate fields as configured by your institution.
    - See the *Configuring Providence* manual *(in development)* to add or modify metadata elements in the cataloging interface.
- **CLICK SAVE**
    - **A record MUST BE SAVED FIRST to activate the Local Navigation bar, giving you access to the following Screens. After saving, you will see "(i) Added Search Form" in the Control Bar, making it safe to navigate away from the current Screen.**

CONTACT INFO

Enter contact information for your Entity.

- Enter Addresses, Phone Numbers, Email addresses and URLs for your Entity
    - If additional fields are needed, click the green + to add additional information
- Save your changes to move onto the next Screen

RELATIONSHIPS

State Relationships between the new Entity and existing records for Objects, Places, Occurrences, Collections, and other Entities

- A lookup field appears for each Type of record that can be linked to your Entity (Fig. 2)
- To relate an existing record to your Entity, type at least three characters of its title in the appropriate lookup field. In a few seconds, a list of matching records will appear. Select your record.
- Once you have selected a record, a dropdown menu will appear. This menu contains types that help to identify the relationship between your two records (for example, an image (Object) may depict an Entity, or an Entity may be the spouse of another Entity).
- Save your changes. The new Relationship will appear in the Entity record, and will also be displayed in the record you linked to.
- To list additional Relationships, click the green to create another lookup field.
- Clicking the red will remove the Relationship you created.

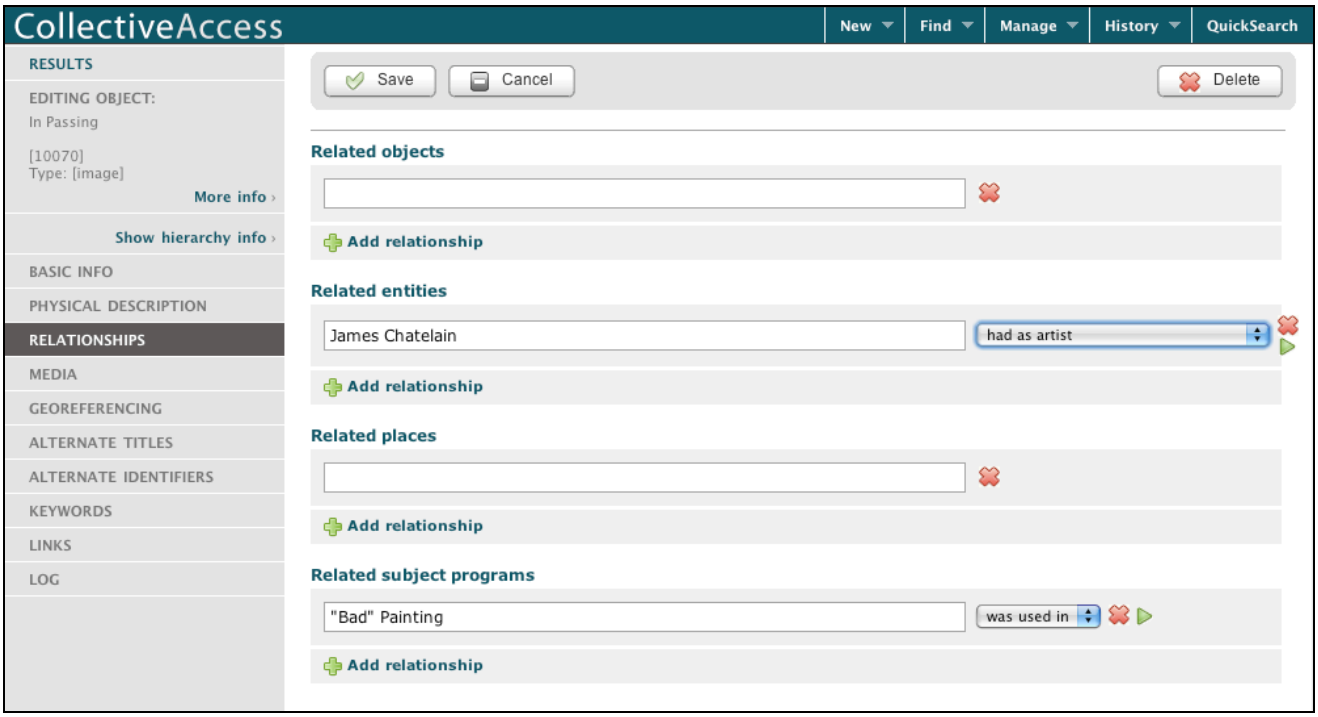

Figure 2

LOG
This Screen shows all changes associated with your record.

b. CREATING A NEW OBJECT RECORD

Objects are the items you are managing. You can diversify your collection by defining Object Types. The Default profile has seven initial Object Types defined for you:

- Document
- Drawing
- Film & Media
- Painting
- Photography
- Print
- Sculpture

NAVIGATION

- Click or mouse-over the **NEW** tab in the Global Navigation Bar
- Select **Objects** in the dropdown menu, and choose a **Type** (Document, Drawing, etc.) to create a new record in the Object Editor.

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

- **Basic Info**
- **Administrative Info**

- **Media**
- **Storage**
- **Sets**
- **Relationships**
- **Keywords**
- **Log**

<u>CATALOGING:</u>

BASIC INFO

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.
- ***Source***
  - Select from the dropdown menu the administrative source of the object.
- ***Status***
  - This dropdown menu allows you to mark your progress in the cataloging process. Choose from Editing in Progress, Editing Complete, Review in Progress, and Complete. You may use this dropdown to identify records within the system, but to change the way your record is displayed, you must use the *Access* dropdown menu.
- ***Access***
  - This dropdown defines who can access your record. This also controls whether or not your record is visible on your website, if you have *Pawtucket* installed.
- ***Title [required]***
  - Record the object's title.
  - If the object does not have an obvious title or heading, then use its identifier as the title.
- ***Alternate Titles***
  - Enter any alternate titles for your Object.
  - 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).
  - 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 green to enter additional alternate titles.
  - If an alternate title is not needed, click the red to remove this field from view
- ***Physical Description***
  - Description and notes concerning your object
- ***Medium***
  - Materials used in making the object
- ***Dimensions***
  - Dimensions of the object. You can specify separate sets of dimensions for the object itself, and its size when shipped.
- ***Edition Number***

    - Edition number, if it is an editioned object
- ***Inscription***
    - A description of any markings, signatures or inscriptions on the object
- ***Object Date***
    - If the object has an associated date, enter that information.
    - CollectiveAccess can process dates and times in a variety of formats. Internally, CA represents date/times as a range with a beginning and an end.
    - Visit our wiki (http://wiki.collectiveaccess.org/) for the most up-to-date information on date and time formats.
- ***External Links***
    - Fields for listing the display name and URL of a website that is associated with your Object. The URL must begin with http:// to be valid.
- ***Related Entities***
    - Use this field to establish Relationships your Object may have to authors, artists, publishers, 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.
- **Additional metadata elements**
    - Enter any additional metadata in the appropriate fields as determined and configured by your institution. Additional fields exist for describing time-based works and other specialized Objects.
    - See the *Configuring Providence manual (in development)* to add or modify metadata elements in the cataloging interface.

- **CLICK SAVE**
    - **A record MUST BE SAVED FIRST to activate the local navigation menu. You will see "(i) Added Search Form" displayed in the Control Bar and it is now safe to navigate to the following Screens.**

ADMINISTRATIVE INFO

Information about the Object for Internal Use, including condition reports and object history.

- ***Condition Notes***
    - Describe the condition of your object
- ***Condition***
    - This dropdown menu allows the user to assign a controlled condition. These can be configured in the Manage Lists & Vocabulary menu
- ***Accession Date***
    - The date that the Object was admitted to the collection
- ***Purchase Price***
    - The price of the Object at acquisition
- ***Provenance***
    - Provenance of the Object.
- ***Part of Lot:***
    - Lookup field to relate the Object to its Lot

MEDIA

Files, images, video or sound clips representing your record. CollectiveAccess supports many filetypes. For a complete up-to-date list of accepted filetypes visit our wiki: http://wiki.collectiveaccess.org/ All of the common formats as of March 2010 (TIFF, JPEG, MPEG-4, Flash Video, WAV, AIFF and MP3) are supported.

- ***Media Rights***
  - Select the Rights holders from the dropdown menu. This is configurable in the Lists & Vocabularies menu.
- ***Media License***
  - License information for your Media.
- ***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. Each Representation will appear as its own line-item on the screen.
  - *Type*
    - If this is scanned media, you may use this dropdown to label the front and backside of your object
  - *Status*
    - You can assign a cataloging status to your Media. This status can differ from the status assigned to the general record.
  - *Access*
    - Choose the access level of your Media. This access level can differ from the access level of the general record.
  - *Is it Primary?*
    - Selecting Yes will set the Media as the first to appear on the public website and cataloging interface if there are multiple images for the record.
  - *Media to Upload*
    - Use this field to upload your Media to the record
  - **CLICK SAVE to view your uploaded Media. Upon saving, a thumbnail of your media will appear with brief file information (click Embedded Metadata to view additional information collected by CA), along with three icons (See Fig. 3):**
    - **Will DELETE your uploaded media, but keep other Media Representations and the general media fields intact.**
    - **Allows you to DOWNLOAD your uploaded media**
    - **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.**

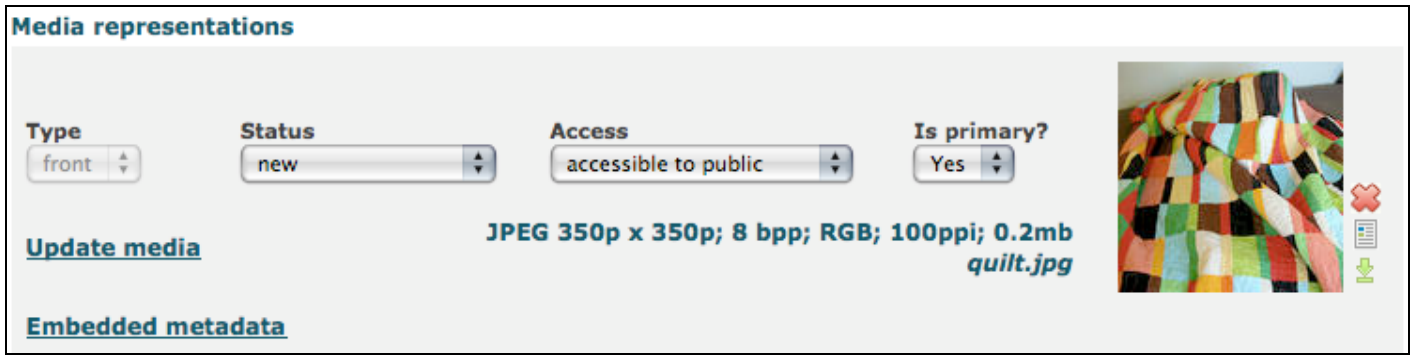

Figure 3

OBJECT REPRESENTATION

Allows you to catalog additional information for each media file that you upload.

- ***Basic Info***
  - *Title*
    - Give your uploaded Media a Title. You can assign an Alternate Title in a later Screen
  - *Media to Upload*
    - You may replace your uploaded media with a new file by uploading it here
  - *Access*
    - You may change the access level of your media here. This field is also displayed on the Media Representation Screen and any changes you make will be reflected there.
  - *Status*
    - You may change the status of your media here. This field is also displayed on the Media Representation Screen and any changes you make will be reflected there.
  - *Caption*
    - Give your media a caption with this field.
- ***Annotations***
  - You may make additional notes to time-based media using Representation Annotations. Please note that this screen is only available for Sound and Video files.
- ***Relationships***
  - Lookup Entities and Occurrences that are related to your Media Representation. The relationship to your Object does not appear, as the Media Representation is automatically linked to this parent record.
- ***Alternate Titles***
  - Enter any alternate titles for your media.
  - Selecting “Alternates” from the drop-down menu will allow you to identify this title as a second title for your media (for example, if a painting has titles in English and German).
  - Selecting “Use For” will allow the system to identify your media 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 green to enter additional alternate titles.

- If an alternate title is not needed, click the red to remove this field from view.
- ***Log***
  - This screen tracks the changes made to your Representation.
- **CLICK SAVE to update the changes to your Representation. Upon saving, you can return to the parent Object record by clicking the Related Objects link below the Inspector in the upper-left side of your screen.**

STORAGE

This screen tracks where our object is stored and a history of where your object has been stored in the past.

- ***Current Storage Location***
  - This field looks up a storage location from the Storage Location hierarchy. To configure this for your institution, see section 3f. *Creating a new Storage Location.*
- ***Past Storage Locations***
  - These fields are plain text input fields designed to help track moves and places where your object was previously stored. Enter the previous Storage Location, Date of Move and who it was Authorized by. To document additional moves, click the green to create another line item.

SETS

This screen lists the Sets that your Object belongs to, if any. Initially, this screen displays all of your existing Sets in a dropdown menu. If you have not created any Sets, this will be blank. To create a new Set, see *Creating Sets*.

- ***Sets***
  - To assign your Object to a Set, select the desired Set from the dropdown menu.
  - Click Save to apply your changes.
  - If you wish to make changes to the Set you selected, 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.
  - To assign an Object to multiple Sets, click *Add to set* to choose additional Sets.
  - Clicking will remove your Object from that Set.

RELATIONSHIPS

Create, view and edit Relationships to Objects, Entities, Places, Occurrences and Collections as described in *Creating a New Entity* in section 3a. of this manual. Two new lookup fields appear for cataloging your Object:

- ***Georeference***
  - This is a lookup field that allows you map a geographical location related to your Object. Enter your desired address. Upon saving this Screen, Georeference will find the geographical coordinates of the address you supplied and provide an aerial map of its location (Fig. 4).
  - You can optionally create Georeferences in GoogleEarth, and import them into CA using the “Upload KML” option. GoogleEarth enables the precise placement of markers, which can then be exported as KML (or KMZ) files for import into CA.
- ***GeoNames***

- This is a lookup field that acts as a name authority for geographical places. Rather than a specific address, more general “place names” can be entered into this field, for example a park, lake or glacier.
- Enter the first few characters of your Place name. A dropdown menu will appear with the closest matches from the GeoNames database.
- Upon saving this Screen, Geonames will find the geographical coordinates of the place you supplied and provide an aerial map of its location.

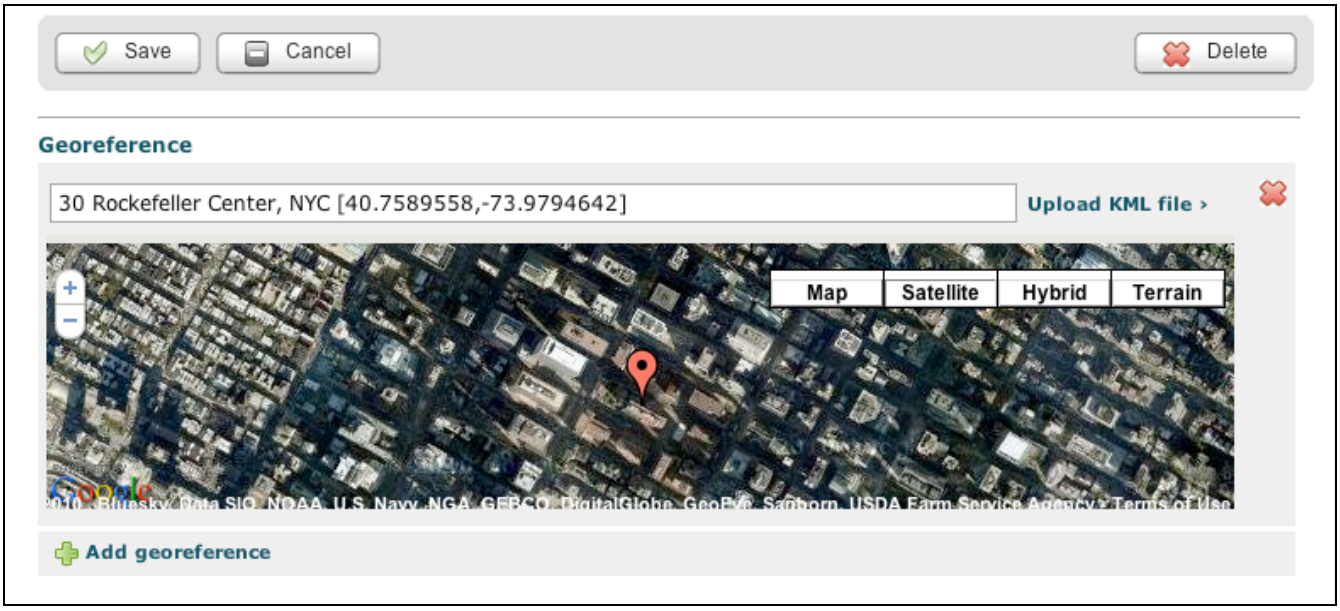

Figure 4

KEYWORDS

Enter genres, subjects, and topics here that describe the object. This screen displays lookup fields only and most terms should already be available in CA. If a new term is needed, refer to *Lists & Vocabularies* section of this manual.

- Related Vocabulary Terms
  - This lookup field refers to the lists configured to *Use as vocabulary*.
  - To Configure this field, edit the lists selected for *Use as vocabulary*.
- Library of Congress Subject Headings
  - This lookup field provides Library of Congress Authorities for your keywords
  - Type the first three or more characters of your desired term to view the closest matches available from the Library of Congress
  - Select your desired term and click save to apply your changes.
  - Next to your field, a hyperlink labeled <u>More</u> provides a quick reference to the Library of Congress’s full entry on the term you selected.

LOG

Tracks all changes associated with that record.

c. CREATING A NEW COLLECTION RECORD

The Collections type in CollectiveAccess allows for the creation of a natural hierarchical relationship between Collections and Objects.

NAVIGATION

New > Collection > Collection Type

- Click or mouse-over the **New** tab in the right-hand global navigation bar.
- Move the mouse over the **Collection** option in the dropdown menu.
- Select a **Collection Type** (internal/external) to create a new record in the Collections Editor

SCREENS

The Collections Editor contains the following screens that receive information about your Collection:

- Basic Info
- Relationships
- Keywords
- Links
- Log

<u>CATALOGING:</u>

BASIC INFO

Contains the most basic information to start a new record.

- **Title**
  - Enter the name or title of the Collection.
- **Alternate Titles**
  - Enter any Alternate Titles for your Collection. This field is described in detail in Section 3a. *Creating a New Entity*
- **Date**
  - Enter date information related to the Collection. CollectiveAccess accepts dates in a wide variety of standard formats. For a complete list of acceptable date and time formats, refer to our wiki.
  - http://wiki.collectiveaccess.org/index.php?title=DateAndTimeFormats
- **Description**
  - Provide narrative descriptive text about the collection if necessary.
- **CLICK <u>SAVE</u>**
  - **A record MUST BE SAVED FIRST to activate the left-side local navigation tabs**

RELATIONSHIPS

- Create, view and edit Relationships to Objects, Entities, Places, Occurrences and Collections. This field is described in detail in section 3a. *Creating a New Entity*.
- Create Object Relationships to add Objects to your Collection. You can choose records of any Primary Type for your Collection. To define this hierarchical relationship, simply choose “contains” from the relationship selector (the Collection “contains” your chosen record).

KEYWORDS

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

- Choose keywords and vocabulary that relate to your Collection. This field is described in detail in section 3b. *Creating a new Object Record*.

LINKS

If there are external websites associated with your collection, you may enter them on this screen.

- **Website Name**
  - Enter the display name of your website
- **URL**
  - Enter the URL of the website you would like to cite. This URL must begin with http:// to be valid.
- Add additional Links by clicking the green or removing existing links by clicking the red

LOG

Tracks all changes associated with that record.

d. CREATING A NEW PLACE RECORD

The Place Editor is a little different than other Editors in CollectiveAccess. Since places are innately hierarchical, Place records within CollectiveAccess are ordered according to this structure.

NAVIGATION

New > Place

- Click or mouse-over the **New** tab in the Global Navigation Bar.
- Choose **Place** in the dropdown menu to open the Places Editor.

SCREENS

The Place Editor contains the following screens that receive information about your Collection:

- Basic Info
- Relationships
- Location
- Alternate Names
- Log

USING THE HIERARCHY VIEWER

- The Hierarchy Viewer (Fig. 5) will automatically open when you choose to create a new Place record. If the Viewer does not display, click the Open Hierarchy Viewer button in the Control Bar.
- The Hierarchy Viewer displays your Places from the broadest location to the most specific. For example, a Place record in the leftmost column may be a country record, which contains states records, which contains county records, etc.
  - Each Place heading is followed by a number in parenthesis that indicates how many

records exist below it in the hierarchy. Selecting the Place heading will display these records in a column to the right of your chosen heading.
    - Clicking the gray ▶ to the right of each Place heading will take you to the full record for your place.
- Options for searching, browsing, sorting and exporting your Place records are displayed to the left of the Hierarchy Viewer.

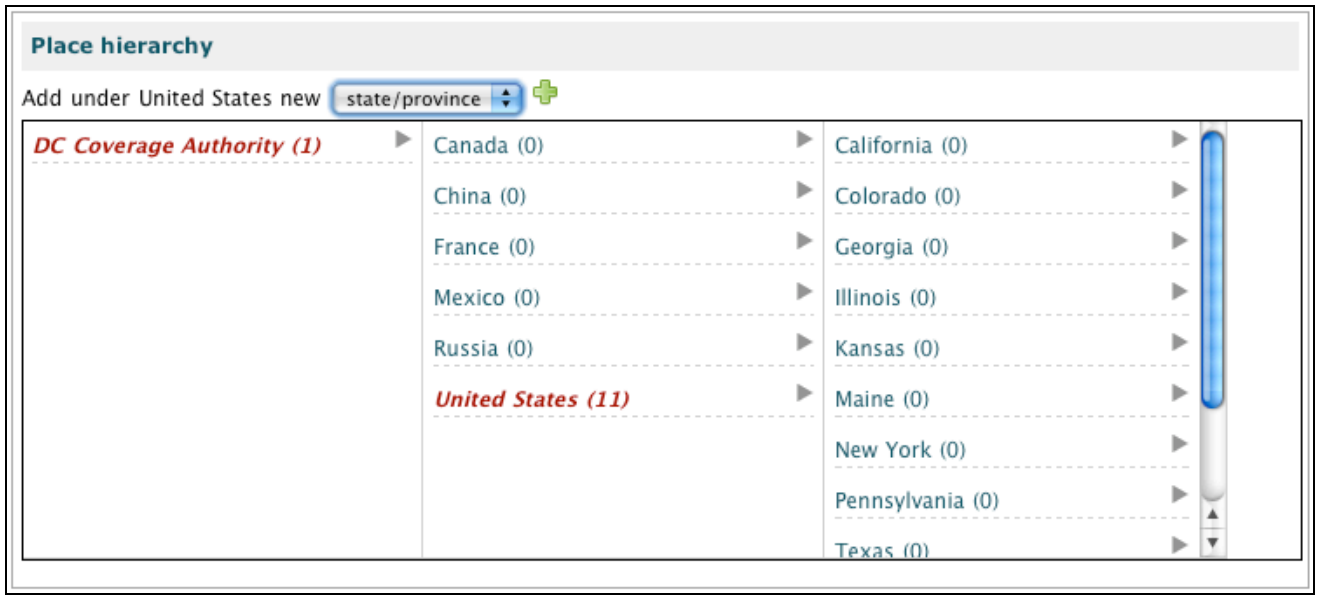

Figure 5

CATALOGING:

You may import an existing Place hierarchy or create your own. Follow the instructions below to create a new Place record in your hierarchy.

CREATING A NEW PLACE RECORD

- Navigate to the level of the hierarchy where you would like your new record to be created. Click the Place heading of its parent record (the record directly above it in the hierarchy). Your record's new path with be displayed directly above the Hierarchy Viewer.
- Next, select the type of Place you would like to add from the dropdown menu. These Place types are configurable in the Lists Editor. To learn more about configuring custom Lists, see *Lists & Vocabularies* in section of this manual. In Figure 5, you can see that the user has chosen to add a new State/Province under the United States country record.
- Click the green ✚ to create your new Place record and be taken to the Place Editor.

HIERARCHY INFO

The position of your Place record within the hierarchy is displayed at the top of each screen of the Place Editor. For example:

My City → My Neighborhood → My Street

You can also view your Place's hierarchical information at any time by selecting "show hierarchy info" in the Inspector. Two dropdown menus in this menu allow you to create child and sibling Place records.

BASIC INFO
Contains the most basic information to start a new record. The following fields are described in detail in section 3b. *Creating a New Object Record*

- ***Name***
  - Enter the name of the new Place.
- ***Place Identifier***
  - Create an ID for your new Place.
- ***Access***
  - Assign an access level to your Place.
- ***Status***
  - Assign a status level to your Place.
- ***Description***
  - Add a descriptive text to your Place.
- **CLICK <u>SAVE</u> to access the following screens**

RELATIONSHIPS
Create, edit and view links with Objects and Entities.

- These fields are described in detail in section 3a. *Creating a New Entity Record.*
- Your record's Relationships to other Places will not appear, as it is automatically linked to its parent and child records within the Place hierarchy. You can view these relationships from any screen in the Place Editor by clicking the Show in Browser button.
- The Relationships screen also contains the Geonames and Georeference lookup fields, allowing you to tie your Place record to place authorities and longitudinal coordinates, if needed. These fields are described in detail in section 3b*. Creating a new Object Record.*

LOCATION
This screen allows you to change the location of your Place within the hierarchy.

- Click the Move in Hierarchy button if the Hierarchy Viewer is not already open.
- Click the new position in the hierarchy where you wish to move your Place record.
- Your choice will be displayed above the Hierarchy Viewer ("Will be moved under [chosen record] after save").
- Click **Save** to change the position of the place within the hierarchy.

ALTERNATE NAMES

- ***Alternate Names***
  - Enter any Alternate Names for your Place. This field is described in detail in Section 3a. *Creating a New Entity* .

LOG
Tracks all changes associated with that record.

e. CREATING OCCURRENCE RECORDS

Occurrence records are typically specific to the type of collection you are managing. The default CollectiveAccess profile provides Editors for Exhibitions, Public Programs, and Publications. These Editors contain specialized fields for these types of records that have the same functions as the fields used for cataloging Entities, Objects, Collections and Places. Please refer to these previous sections for help with cataloging Occurrences. To learn more about configuring Occurrences for your institution, please refer to the *Configuring Providence* manual *(in development).*

NAVIGATION

New > Exhibition, Public Program or Publication

- Click or mouse-over the **New** tab in the Global Navigation Bar.
- Choose **Occurrence Type** in the dropdown menu to open the Occurrences Editor.

SCREENS

The Place Editor contains the following screens that receive information about your Collection:

- Basic Info
- Relationships
- Location
- Keywords
- Log

f. CREATING STORAGE LOCATIONS

You can create Storage Locations to document where Objects in your collection are located. Though its data is distinct from the Places you previously cataloged, the process for cataloging and configuring Storage Locations is identical to the process described in section 3d *Creating a new Place Record*. Please refer to this section for information on how to use the hierarchy viewer and create new location records.

NAVIGATION

New > Storage Location

- Click or mouse-over the **New** tab in the Global Navigation Bar.
- Choose **Storage Location** in the dropdown menu to open the Storage Location Editor.

SCREENS

The Storage Location Editor contains the following screens that receive information about your Collection:

- Basic Info
- Location
- Contents
- Alternate names
- Log

CATALOGING:

- In the Storage Locations Editor, “Contents” replaces the “Relationships” screen. As Storage Locations can only have Relationships to Objects, this screen is where you can add, delete and view the Objects located at your particular Storage site.

g. CREATING OBJECT LOTS

Use the Object Lot editor to catalog information about Objects donated or loaned to your institution.

NAVIGATION

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 (**donation, loan, purchase, promised gift)

SCREENS

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

- Basic Info
- Entities
- Objects
- Log

CATALOGING:

BASIC INFO

- ***Accession Status***
  - Select your Lot’s point in the acquisition process. Choose from pending accession, accessioned, loan, non-accessioned, or potential acquisition.
- ***Lot Identifier***
  - Assign an identifier to your Lot
- ***Name***
  - Assign a name to your Lot, if necessary
- ***Alternate Names***
  - List any alternate names for your Lot here. This field is described in detail in section 3a. *Creating a New Entity Record*
- ***Extent***
  - Enter the number of items in the Lot
- ***Extent Units***
  - Enter the extent units of your Lot (for example photographs, pieces, artworks)
- ***Status***
  - Enter the cataloging status of your Lot
- ***Credit***
  - Enter Credit text for your Lot
- ***Notes***
  - Enter Notes about your Object Lot
  -

ENTITIES

- Lookup Entities related to your Lot using the Entities relationship field.

OBJECTS

- Lookup Objects that comprise your Lot using the Object relationship field.

LOG

Tracks all changes associated with that record.

3.0 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.

a. 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. Click on the tab to activate the search box dropdown (Fig. 6). Enter a keyword or phrase, and click the green arrow to search.

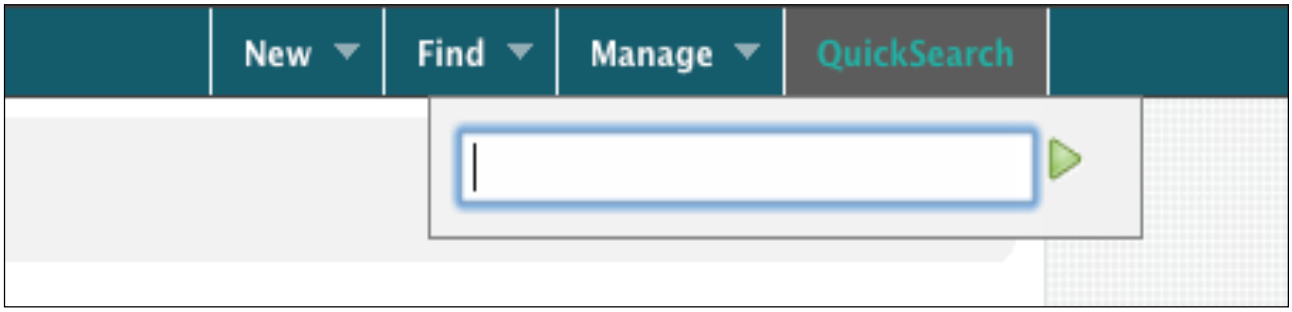

Figure 6

Results will display for all the records containing that keyword or phrase. Records are organized by Primary Type (Objects, Entities, Places, Occurrences, and Collections, Storage Locations and Object Lots), with the number of records retrieved listed next to the heading for each Type (Fig. 7).

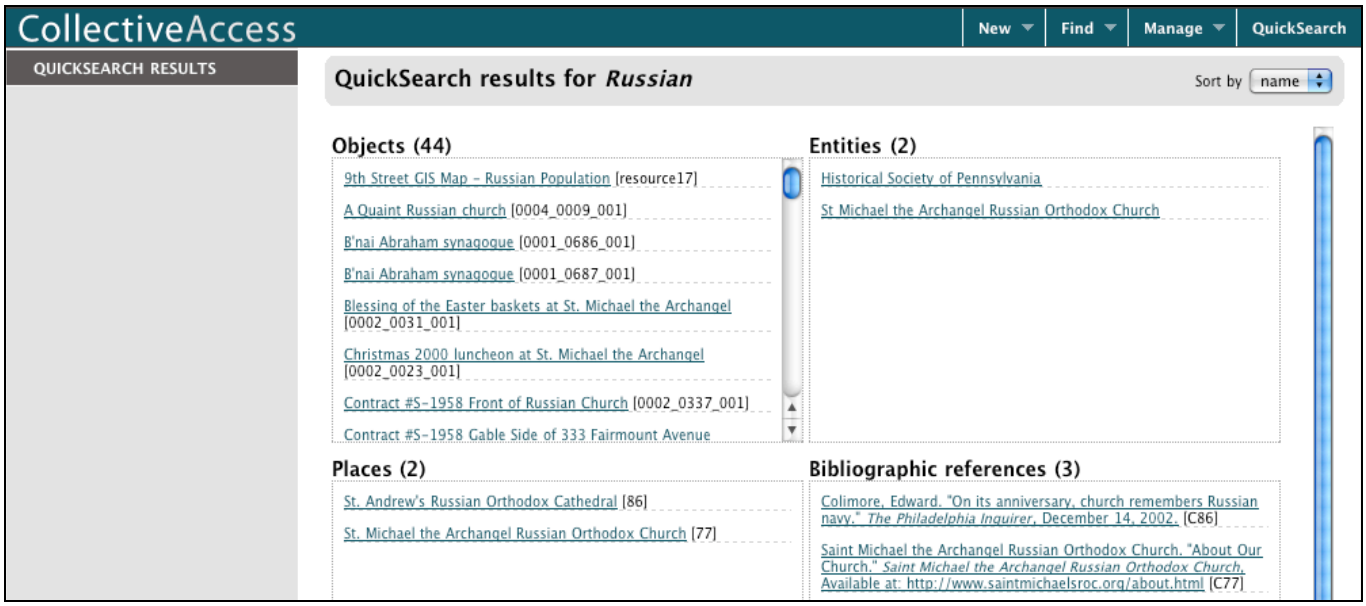

Figure 7

Each record is listed with its Title and Identifier. To view the full record for a result, click on the hyperlinked Title. Then 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.

b. BASIC SEARCH USING FIND

Using Find allows for a *targeted* search for records of a known Primary Type (Objects, Entities, Places, Collections, Occurrences). 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 (Fig. 8).

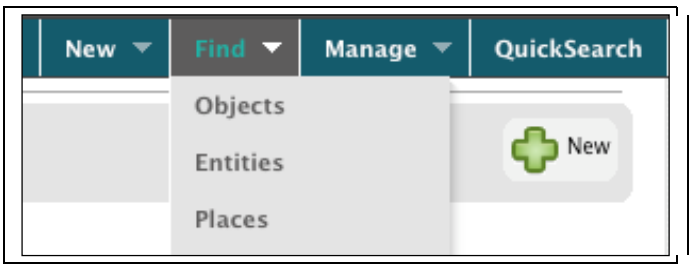

Figure 8

Next select a Primary Type from the dropdown menu. For example: if the record describes an Object, select Objects; if it describes a person, select Entities, and so on. Once the Type is selected, the results for the last search performed will automatically display. 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.

The Inspector provides you with 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.

c. 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 forms, simple forms to access unique data, or a general-purpose form for any collection management project. Please note that the Advanced Search option is currently only available for searching Objects.

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.
  - Clicking the plus symbol **[+]** allows one to hide or show each group at anytime during a search.
- To change between search forms, choose another form in the dropdown menu. Any applicable search terms will be carried over from the previous form into the new form.

Creating an Advanced Search Form

- Open “My Search Forms” by mousing over the **Manage** tab in the Global Navigation bar and selecting it from the dropdown menu (See Fig. 9). This will open all the Advanced Search Forms currently in your system.

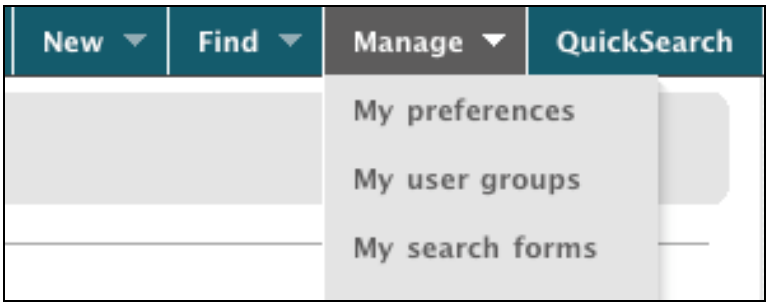

Figure 9

- To create a new search form, click on **New Form** in the Control Bar.
- Enter some basic information about your new Search Form:
  - Enter a unique **Form name** for the new Form
  - Enter a unique alpha-numeric identifier in the **Form code** text box
  - Select a **Search Type**, this determines which Primary Type (Objects, Entities, etc) your form will be used to find
  - 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.
  - Click **Save** to save this information and begin editing **Form Settings** (Fig. 10).

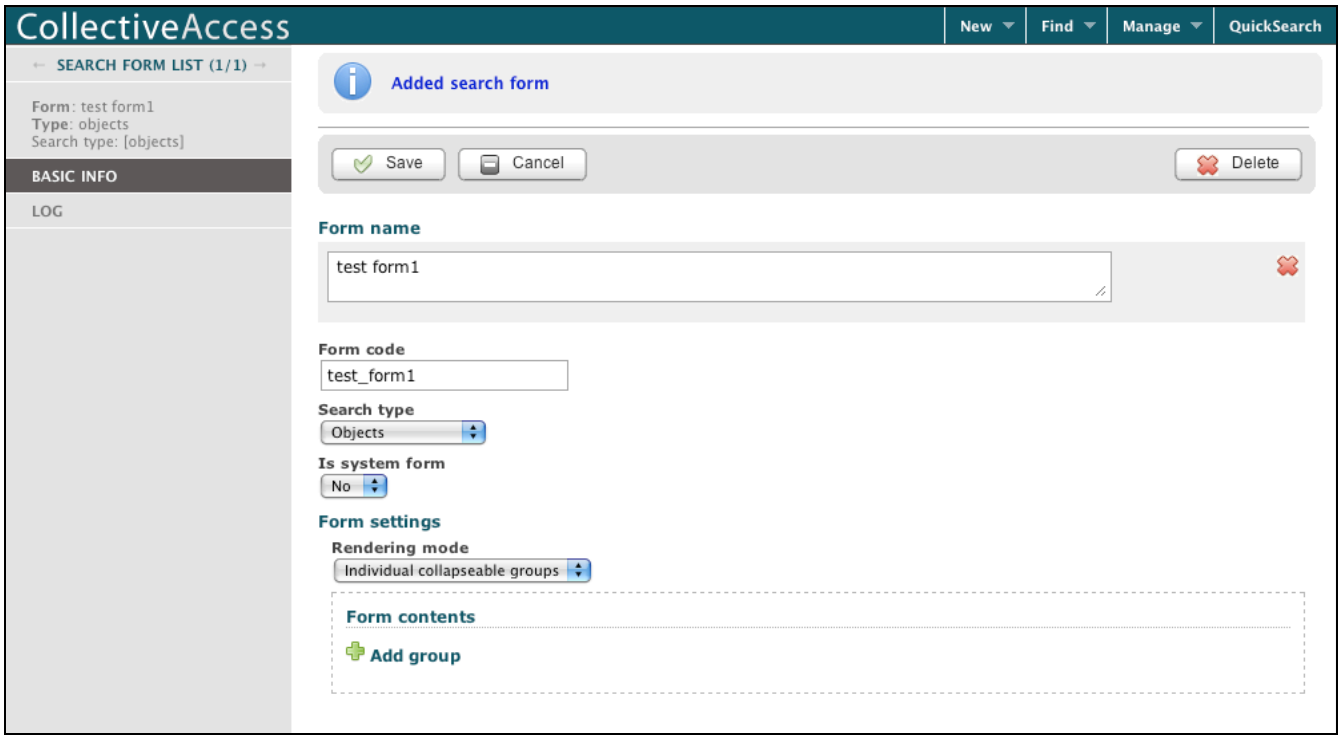

Figure 10

- First select the **Rendering mode**; this defines how you would like the form to display:
  - "Individual collapsible groups" allows you to create multi-line sections that can

collapse.
    - "One form element per line" displays only one field per line to and does not permit collapsing.
- Click **Add Group** to activate the first group of elements.
    - Groups allow you to put multiple elements together into collapsible sections for dynamic yet complex search forms.
- Now select the elements you would like to include in the first search Group.
    - Select the desired element from the dropdown list.
        - Elements are displayed alongside the Primary Type they describe, for example, the Status field for an Object record is displayed as *[objects] Status*.
    - To add your chosen element to the Group, click the green . Your element will appear as a gray box. To remove an element from the Group, click the red .
    - Repeat the last two steps to add more elements to the search Group.
    - Once you have added all the desired elements to this Group, you can create additional groups by clicking **Add Group** and repeating the above steps (Fig. 11).

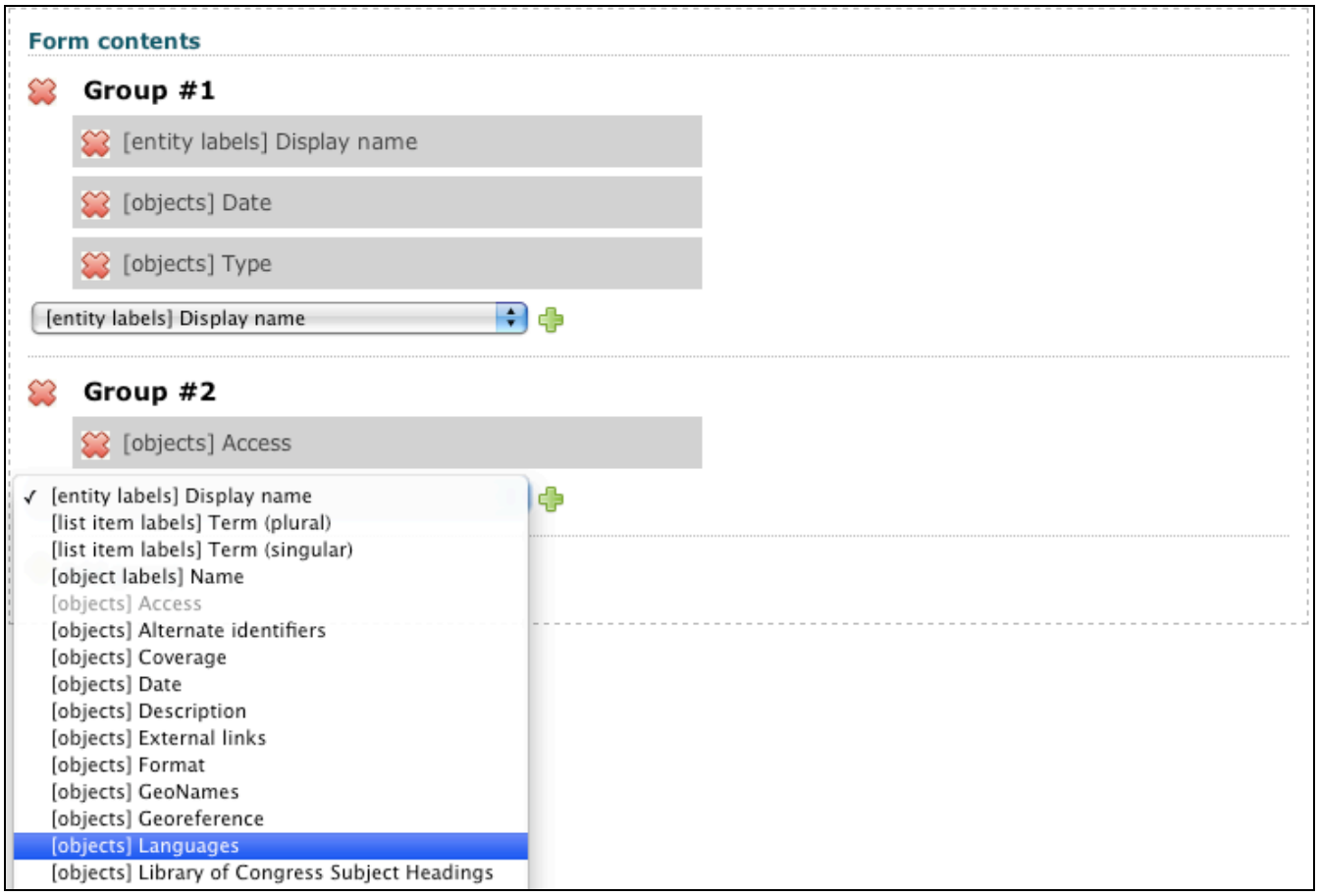

Figure 11

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

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

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.

d. 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.

5.0 SYSTEM CONFIGURATION AND PREFERENCES

This section provides a general overview of the various functions for System Configuration and User Preferences in Providence. For a more detailed account see the *Configuring Providence* manual (in progress).

Manage > System Configuration

Use the System Configuration tab to edit, organize, and control the following:

- **User interfaces (UIs)**
  - Configures the editors for the primary types.
  - Controls the screens (tabs) for all the editors.
  - Controls the bundles (metadata elements) for each screen.
  - Click on the small document icon to view and manage the details for each UI.

- **Metadata elements**
  - Edit, create, or delete metadata elements (data input fields or bundles) that are used in the cataloging screens (tabs).

- **Relationship types**
  - Manages the relationship types between the primary types (objects, entities, places, occurrences, collections, storage locations, vocabulary terms, and list items).
  - The relationship types editor uses a hierarchy browser like Places or Lists & Vocabularies.
  - To create or modify a relationship type:
    - Navigate to where the new term is needed
    - Click on the green plus sign [+] to add a new term
  - To modify an existing relationship type
    - Navigate to the term and click on the gray arrow to go to its record
    - Click save after the changes are made

- **Locales**
  - Configures languages that can be used for entry of content. For example, if you wish

to enter information in both English and Spanish, you could add the Spanish locale here, after which all language-specific fields (eg. text fields) will include a drop-down to specify locale.

- **Configuration Check**
  - Will run a check on the server and software and provide configuration details that aid in technical troubleshooting.

Manage > Access Control

- **User Logins**
  - Create as many user logins are needed
  - Click on the green arrow to add a new user
  - Click on the document icon to modify an existing user login

- **User Groups**
  - Create custom user groups. Groups allow users to assigned sets of privileges in batches.

- **Access Roles**
  - Create custom access roles. Roles are specific sets of privileges that may be assigned to specific users or to groups.

Manage > Lists & Vocabularies

Control system [SYS] and vocabulary [VOC] lists. (See **Appendix a** for details on how to edit Lists and vocabularies.) The components of this editor include:

- Uses **Hierarchy Viewer**
- Edit and configure **System lists**
- Edit and configure **Vocabulary lists**

Manage > My sets

Create and manage sets to organize the primary types into curated groups for online content.

Manage > My search forms

*See the Advanced Search section of this manual

Manage > My preferences

Edit and control various components of the database. The preferences will be saved specifically for the user logged in. These components include:

- **User interface**
- **Cataloging**
- **Units of measurement**
- **User profile**

6.0 CONCLUSION

The center of a CollectiveAccess system is the *relationships* between records. It's through these relationships that create the syndetic structure that organizes and provides access to your assets.

We are always developing new features and tools to better your cataloging and collection management experience. Stay in touch and please let us know if you have any questions, comments, or find a little bug in the software.

Thanks!

If you have questions or comments contact us!

Seth Kaufman: seth@whirl-i-gig.com

Amber Billey: billey@whirl-i-gig.com

7.0 RESOURCES

The CollectiveAccess website: http://www.collectiveaccess.org/

The CollectiveAccess wiki: http://wiki.collectiveaccess.org/

Library of Congress Authorities: http://authorities.loc.gov/

Avery Art & Architecture Thesaurus:
http://www.getty.edu/research/conducting_research/vocabularies/aat/

8.0 APPENDIX

a. Editing Lists and Vocabularies

Go to Manage > Lists & Vocabularies in the Global Navigation.

- The **Hierarchy Viewer** should automatically open, however if it does not- click on the **Open Hierarchy Viewer** button to the right of the search box.

- **Create a New List**
  - Click on the green plus sign labeled *Add new list*
  - Enter a unique list code
  - Enter the Name of the code
    - Is hierarchical – Yes or No if this list is bound to a hierarchical structure.
    - Is system list – Yes or No if this list will be used throughout the system.
    - Use as vocabulary – Yes or No if this list will be used as a vocabulary.
  - Click **save**

- **Create a New Term**
  - Navigate to the place in the hierarchy for the new term.
  - Define the term type:
    - **Concept** – the further level that is an actual usable term. *Most terms will be concepts.*
    - **Facet** – a broad division of the hierarchy, usually under the root.
    - **Guide term** – used to organize the hierarchy into logical segments. These will usually be under facets.
    - **Hierarchy name** – the name of the entire hierarchy. This is the top level of a hierarchy.
  - Click on the green plus sign
  - Enter the Item name (singular)
  - Enter the Item name (plural)
  - Enter the Id number for the term
  - Enter the Item value for the term
  - Set configurations
    - Is enabled – Yes or No to enable (activate) the term.
    - Is default – Yes or No make the term the default in a list.

- **Edit or delete an existing term**
  - Click on the grey arrow beside the term to go to its record
  - Make changes and click **save** or click the red to delete the term.

b. Loading Lists and Vocabularies

There are two methods to load lists and vocabularies into Providence, but this also depends on the type of list. System lists can be imported through the installation profile; while vocabularies such as the AAT or TGN can be imported directly into the system.

Installing System Lists through the Installation Profile
*Refer to our *Building Installation Profiles* manual for specific instructions on how to build lists through **List Definitions** in the installation profile.

Loading Vocabularies
First, vocabularies such as the AAT and TGN are copyrighted. You must sign a license and pay the Getty before using these thesauri.

Once you have obtained your license, the Getty will send you a URL which provides download access to the AAT data in several file formats, including XML, XML UTF-8, MARC and "relational." CollectiveAccess includes a utility to import the XML UTF-8 format data. Only the XML UTF-8 data will work. If you mistakenly use the plain XML format files, all diacritic and non-latin characters will appear incorrectly. The other formats will not work at all.

The import utility is a PHP script named import_aat.php located in *support/import/aat/*. After downloading the XML UTF-8 file set, decompress it and place the *AAT.xml* file contained in the set in the same directory as the *import_aat.php* utility. Invoke the import utility by running the program with the hostname of the CollectiveAccess database you wish to import into as an argument. For example (assuming you are in the *support/import/aat* directory):

```
php import_aat.php demo.CollectiveAccess.org
```

c. Creating Sets

CollectiveAccess allows you to create unique Sets to organize and manage your Objects. Through Sets you can curate content for a website, manage cataloging workflows, group objects together for really any kind of purpose.

Create a New Set

- Go **to Manage > My Sets** in the Global Navigation
- Select the type of Set you would like to create
  - Public presentation – will publish to the public website (Pawtucket)
  - User set – creates a set only for use in Providence
- Select the Set Content – what types of records you want to add to this set.
- Enter a Title for the Set
- Enter the Set Code – a unique identifier that will distinguish this set in the database
- Enter an Introduction (if needed)
- Set the Access level
- Set the Status level
- Click **save** to activate the Set

- **You must create and save the Set before you can add records.**

- 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)

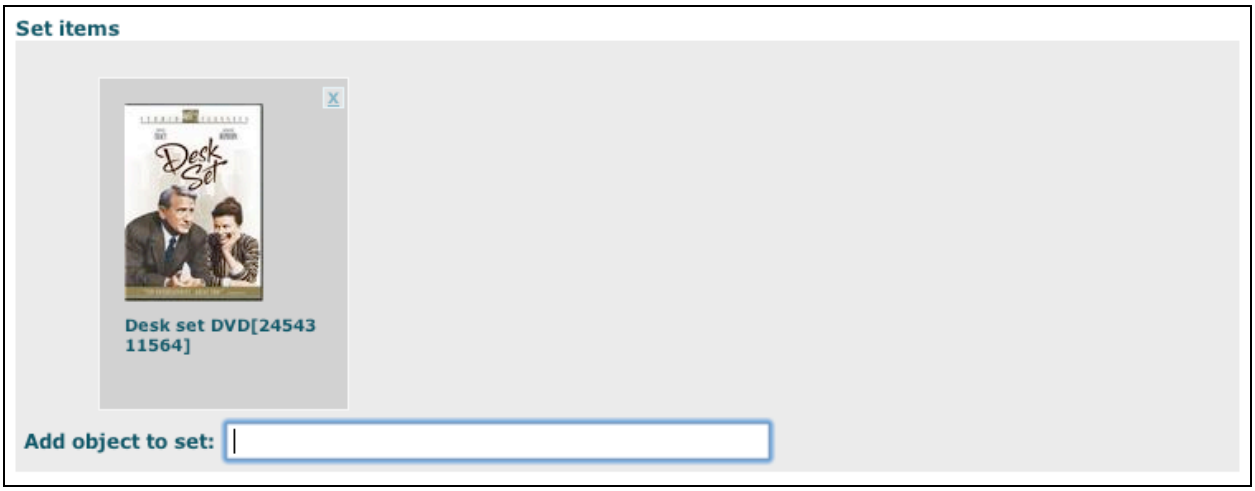

Figure 12

d. Editing Relationship Types

CollectiveAccess can create complex relationships between records, and even more importantly it allows you to define those relationships in any way you want. To do this, you must configure and edit the Relationships Types.

- Go to **Manage > System Configuration** in the Global Navigation.
- Then click on **Relationship Types** in the Local Navigation.
- The **Hierarchy Viewer** should automatically open, however if it does not- click on the **Open Hierarchy Viewer** button to the right of the search box.
- Select the Relationship you would like to edit
  - It is recommended that you familiarize yourself with the Relationships can exist in CollectiveAccess between the Primary Types. Review section 3.2.6 of the *Building Installation Profiles* manual for a complete list of these Relationships.
- Click the green plus sign to add a new relationship type (See Figure 13)
  - Enter the typename and description (forward sense)
  - Enter the typename and description (reverse sense)
    - Forward and reverse sense refers to reading the relationship from left to right. For example, in an object <--> entity relationship objects are *created by* entities, and entities *create* objects.
  - Enter the relationship type code
  - Select default status
  - Select any type restrictions
  - Enter sort number if necessary
- Click **save** to create the new relationship type.

- Like editing Lists and Vocabularies, click on the gray arrow beside a typename to go to the record for the type. Make any necessary changes and click **save** to save the record, or **delete** if you need to delete the type.

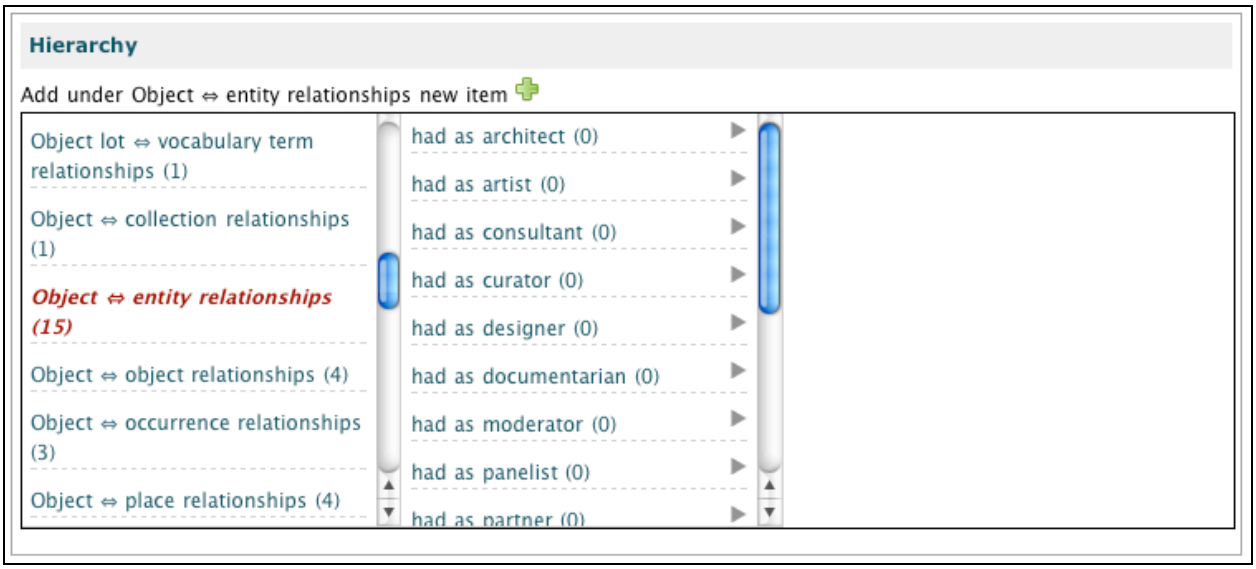

Figure 13

e. Configuring Displays

Create custom displays for search results, and then use those results to export tab or comma delimited files. Displays essentially allow you to select exactly which fields from Object records you want to see in search results.

Creating New Displays

- Click the green plus sign to create a new Display
  - Enter the Name for the new Display
  - Enter the Display code
  - Select the Display type
  - Select Yes or No for Is system
    - Yes will allow all users to access this display and only the administrator can delete it.
    - No will only allow the user who created the display to view and edit it.
- Click **save**

- Next add content to the **Display list settings**.
- Select a metadata element from the dropdown list
- Click the green plus sign labeled “Add element” to add the element to the Display settings.
- Add as many elements as needed for this Display.
- Click on the metadata element boxes to drag and drop into order.
- Click **save**

Using Displays in FIND

- Select the New Display from the Display dropdown in the Inspector
- Select either Full or List from the Results layout in the Inspector
- Search for the desired Objects
- The results will show according to the configured Display.

Exporting Results
Once you have retrieved the records you need and configured their display in the style that you want, you can easily export those results.

- Select either **Tab delimited** or **Comma delimited (CSV)** from the **DOWNLOAD SELECTION AS** option in the Inspector.
- The file should automatically download and open in a text editor.

f. Printing Labels

Creating and printing labels in CollectiveAccess using Find is easy!

- Select the **Object** option under the **Find** dropdown menu
- Search for the object(s) that need labels
- Select what kind of labels you would like to print using the Print Labels dropdown menu on the left-side local navigation bar.
  - Most of the label types are standard Avery-brand sizes, and you can create your own formats by editing the label formats configuration file (this is a text configuration file that is part of the CollectiveAccess software package).
  - This file is located in app/conf/ca_objects_label_layouts.conf
- Click **print >**
- A PDF document of labels will be generated and can be viewed and printed through any PDF reader software such as Preview or Acrobat.

e. Editing Media

There is a lot you can do with media once it is uploaded into CollectiveAccess. For a complete lest of accepted media file formats visit our wiki (http://wiki.collectiveaccess.org/).

Images

After the file is uploaded, click on  Edit icon to open the record for that specific media representation.

- BASIC INFO
  - Add a Title for the Image
  - Add a Caption
  - Select Access and Status levels
- ANNOTATIONS
  - **Annotations are not supported for this type of media
- RELATIONSHIPS
  - Relate Entities, Places, and Occurrences to the media representation
- ALTERNATE NAMES
  - Provide alternate names/titles for the media representation so users can find it!

Moving Images

After the file is uploaded, click on  Edit icon to open the record for that specific media representation.

- BASIC INFO
  - Add a Title for the Image
  - Add a Caption
  - Select Access and Status levels
- ANNOTATIONS
  - Annotations allow you to select sections of time-based media. You can create as many Annotations as you need/want related to a media representation.
    - Enter the Start point in the timecode for the section (in hh:ss:ff format)
    - Enter the End point in the timecode for the section (in hh:ss:ff format)
    - Enter a Title
  - Click **save**
  - To provide additional information about a specific annotation, click on the **More >** link followed by the Edit icon to open the record for that specific annotation.
    - Here you can add Keywords, Relationships, and Alternate Names for that specific annotation.
  - Click the **← edit representation** link in the Inspector to go back to the media representation record.
- RELATIONSHIPS
  - Relate Entities, Places, and Occurrences to the media representation
- ALTERNATE NAMES
  - Provide alternate names/titles for the media representation so users can find it!

Sound

After the file is uploaded, click on Edit icon to open the record for that specific media representation.

- BASIC INFO
  - Add a Title for the Image
  - Add a Caption
  - Select Access and Status levels
- ANNOTATIONS
  - Annotations allow you to select sections of time-based media. You can create as many Annotations as you need/want related to a media representation.
    - Enter the Start point in the timecode for the section (in hh:ss:ff format)
    - Enter the End point in the timecode for the section (in hh:ss:ff format)
    - Enter a Title
  - Click **save**
  - To provide additional information about a specific annotation, click on the **More >** link followed by the Edit icon to open the record for that specific annotation.
    - Here you can add Keywords, Relationships, and Alternate Names for that specific annotation.
  - Click the **← edit representation** link in the Inspector to go back to the media representation record.
- RELATIONSHIPS
  - Relate Entities, Places, and Occurrences to the media representation

- ALTERNATE NAMES
  - Provide alternate names/titles for the media representation so users can find it!

9.0 GLOSSARY

The language used in *Providence* is a combination of traditional cataloging terminology and unique CollectiveAccess vocabulary. Visit our 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.