

## Quick Start User Manual – Version 7 – Staff Interface

CollectionSpace is a web-based, open-source collections information management system. From cataloging and loans to inventory and digital asset management, CollectionSpace is used to manage many of the day-to-day activities of museum collections professionals and others who work with art, artifacts, objects, and specimens.

This manual provides a quick overview of the staff interface of the CollectionSpace application. A more extensive user manual is available (in English) on the program wiki, along with separate documentation for the CollectionSpace Public Browser and the CSV Import Tool.

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## Getting Around

CollectionSpace is a web-based application, installed on a server and accessed from any web browser, such as Chrome, Firefox, or Safari. CollectionSpace is platform agnostic – whether you’re using a Mac, a PC, a tablet, or your smartphone, you can use CollectionSpace. For the best user experience, we recommend accessing CollectionSpace via the most recent version of Chrome or Firefox. **Tip:** Use CollectionSpace’s internal navigation buttons to move around the application. Data can be lost if browser navigation buttons (e.g. the back button) are used.

## Login and Password Reset


Visit the URL provided by your system administrator, and enter your login and password. If you have forgotten your password, click the link at the bottom of the login box for a reset email.

### Sign In

Please sign in to continue.

  
  
[Forgot password](#)

## Main Navigation

Objects  Administrator | [Sign out](#)  
[My CollectionSpace](#) [Create New](#) [Search](#) [Tools](#) [Administration](#)

At the top of each page in CollectionSpace is the main navigation menu. This menu includes links to commonly used areas of the application, a keyword search box, and information about your login status.

[My CollectionSpace](#) includes a list of all recently updated records.

[Create New](#) shows all record types you have permission to create.

[Search](#) allows you to complete an advanced search within any record type.

[Tools](#) includes support for managing drop-down lists, running reports, and running batch edits.

[Administration](#) allows you to create and edit user accounts and roles.

## Create New

Create New shows all record types you have permission to create. Click the name of the record type you'd like to create to go to a new, blank record.

Object records describe the art, artifacts, objects, and specimens in our care. Procedures describe lifecycle events such as loans, condition reports, and digitization.

Authorities are terms used for cataloging and indexing, such as people, places, and concepts.

My CollectionSpace [Create New](#)  [Tools](#) [Administration](#)

### Create New

<b>Objects</b>	<b>Procedures</b>	<b>Authorities</b>
<a href="#">Object</a>	<a href="#">Acquisition</a>	<a href="#">Citation</a>
	<a href="#">Condition Check</a>	<a href="#">Local</a>   <a href="#">WorldCat</a>
	<a href="#">Conservation</a>	<a href="#">Concept</a>
	<a href="#">Exhibition</a>	<a href="#">Activity</a>   <a href="#">Associated</a>   <a href="#">Material</a>
	<a href="#">Group</a>	<a href="#">Nomenclature</a>   <a href="#">Occasion</a>
	<a href="#">Insurance/Indemnity</a>	<a href="#">Organization</a>
	<a href="#">Intake</a>	<a href="#">Local</a>   <a href="#">ULAN</a>
	<a href="#">Loan In</a>	<a href="#">Person</a>
	<a href="#">Loan Out</a>	<a href="#">Local</a>   <a href="#">ULAN</a>
	<a href="#">Location/Movement/Inventory</a>	<a href="#">Place</a>
	<a href="#">Media Handling</a>	<a href="#">Local</a>   <a href="#">TGN</a>
	<a href="#">Object Exit</a>	<a href="#">Storage Location</a>
	<a href="#">Transport</a>	<a href="#">Local</a>   <a href="#">Offsite</a>
	<a href="#">Use of Collections</a>	<a href="#">Work</a>
	<a href="#">Valuation Control</a>	<a href="#">Local</a>   <a href="#">CONA</a>








## Record Editing

All records in CollectionSpace have the same format. The blue header shows what record and record type you are editing, the gray data entry fields provide space for information management, and the right sidebar shows links to media, vocabulary terms, and related records.

The screenshot displays the 'Record Editing' interface in CollectionSpace. At the top, the header shows 'collectionspace' with a search bar and 'Administrator | Sign out'. Below the header, navigation links include 'My CollectionSpace', 'Create New', 'Search', 'Tools', and 'Administration'. The main content area is titled 'Search result 4 of 30' and '20CS.F1911.443a-e - Powdered tea container (natsume)'. A blue header bar indicates 'Object' and 'Object' with a 'Hide sidebar' link. Below the header, there are action buttons: 'Save', 'Clone', 'Revert', 'Delete', and 'Standard Template'. The main editing area is divided into several sections: 'Object Identification Information', 'Brief description', 'Distinguishing features', 'Comment', 'Computed current location', and 'Annotation'. The 'Object Identification Information' section includes fields for 'Identification number\*' (20CS.F1911.443a-e), 'Number of objects' (1), 'Other number' (Value and Type), 'Responsible department' (Decorative Arts), 'Collection' (permanent collection), 'Record status' (approved), 'Publish to' (CollectionSpace Public Browser), 'Inventory status' (1), and 'Annotation' (Table with columns: Type, Note, Date, Author). The 'Brief description' field contains a sample text: 'This record contains sample data provided by CollectionSpace community members or adapted from open access resources. While the record may reference real artworks, people, and organizations, the information should not be read as an accurate description of any artwork, person, or organization, or of any relationship between the holding institution and CollectionSpace.' The 'Computed current location' field shows 'MST:3'. The right sidebar shows 'Media: 1' with an image of a powdered tea container, and a list of related records: 'Terms Used: 5', 'Related Objects: 0', 'Related Procedures: 3', 'Reports: 0', and 'Data Updates: 0'. Each item in the list has an 'Open' button.

## Field Types

Within the data entry form you will see different field types:

<p>Required field</p> <ul style="list-style-type: none"> <li>- Required fields are marked with a red star and must have data before the record can be saved</li> </ul>	<p>Reference number*</p> <input type="text"/> 
<p>Free text field</p> <ul style="list-style-type: none"> <li>- Enter any type of data, some fields are limited to numeric values</li> </ul>	<p>Method</p> <input type="text"/>
<p>Dropdowns</p> <ul style="list-style-type: none"> <li>- Select a term from a short list</li> </ul>	<p>Record status</p> <input type="text" value="approved"/> 
<p>Vocabulary fields</p> <ul style="list-style-type: none"> <li>- Enter text and choose from search results or add the term to the vocabulary</li> </ul>	<p>Person</p> <p>1 Eleanor Brown  -</p> <p>+ No matching terms found</p> <p>Place Add "Eleanor Brown" to</p> <p>1 + Local Persons -</p> <p>+ + ULAN Persons</p>
<p>Date fields – Calendar</p> <ul style="list-style-type: none"> <li>- Enter a date manually or choose from the calendar date picker</li> </ul>	<p>Loan return date</p> <input type="text"/> 
<p>Date fields – Structured</p> <ul style="list-style-type: none"> <li>- Enter a date into the summary field and select Tab to auto-generate date range</li> <li>- You may also enter date ranges manually</li> </ul>	<p>Date</p> <input type="text" value="ca. 1925"/> 
<p>Repeatable fields</p> <ul style="list-style-type: none"> <li>- Click on the plus sign to add another of the same field</li> </ul>	<p>Responsible department</p> <p>1 Paintings and Sculpture  -</p> <p>2 Antiquities  -</p> <p>+ </p>

## Relationships

CollectionSpace has a relationship-based architecture, where procedural records are created and related to one another to create complete lifecycle documentation for an Object or related materials.

To create a related procedural record, click on the +Related tab and select the type of record you would like to create from the dropdown. You may also add a relationship to an existing record.

### Example: Media Handling

To relate an image or other media file to an Object:

- Open the Object record
- Click on the +Related tab and select Media Handling from the dropdown
- Click on Create New
- Add at least an Identification Number to your Media Handling record
- In the File Information section, click Select and choose the file you would like to upload
- Save the record
- The media record will be uploaded and you will see a thumbnail in the right sidebar
- Click Create New again to relate additional images or media files to an Object

The screenshot shows the 'Related Media Handling: 1' interface. At the top, there is a table with columns for Thumbnail, Identification number, Title, and Updated. Below this is a form for creating a new record. The 'Media Handling Information' section includes fields for 'Identification number\*' (MH\_20CS.A19570644000), 'Publish to' (CollectionSpace Public Browser), and 'Title' (Statoscope). The 'File Information' section shows a selected file named 'NASM-E94CCB7A52692\_001-000004.jpeg' with a thumbnail, type 'image/jpeg', size '1927704', and creation/updated times of 'Nov 3, 2021 1:32:19 PM'. Action buttons like Save, Clone, Revert, Delete, Open, Unrelate, and Close are visible.

### Example: Location, Movement, and Inventory

To relate a storage location to an Object:

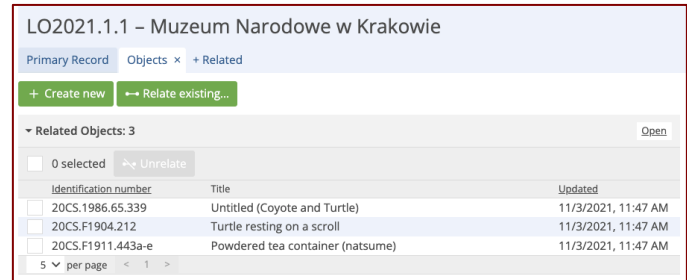
- Open the Object record
- Click on the +Related tab and select Location/Movement/Inventory from the dropdown
- Click on Create New
- Add a Reference number, Current location, and Location Date
- Save the record
- To move the Object, it is recommended to create a new Location record instead of editing an existing one in order to keep Location history

The screenshot shows the 'Related Location/Movement/Inventory: 1' interface. It features a table with columns for Reference number, Current location, Location date, and Updated. Below is a form for creating a new record. The 'Object Location Information' section includes fields for 'Reference number' (LMI\_20CS.A19570644000), 'Normal location', 'Current location' (MST:2), 'Location\*' (MST:2), 'Fitness', 'Note', and 'Location date' (2011-01-01). Action buttons like Save, Clone, Revert, Delete, Open, Unrelate, and Close are visible.

## Example: Loan Out

To relate Objects to a Loan Out record:

- Go to Create New and click Loans Out
- Enter required data and any other details to the Loan Out record
- Save the record
- Click on the +Related tab and select Objects from the dropdown
- Click on Relate Existing
- Search for the Accession Numbers of the Objects that are going out on Loan
- Click the checkbox to the left of the Object going out on Loan
- Repeat as necessary to add all Objects to the Loan



## Search

Search allows you to search for any record type. If you would like to search across all cataloging, procedural, and authority records, select “all record types.”



If you would like to search a particular record type, select that type from the dropdown. If you are searching an authority comprised of multiple vocabularies, you may choose to search across all vocabularies or select one.

Once you have selected a record type, enter a search term and press enter or select search. Leaving the search box blank will retrieve all records of a particular type.

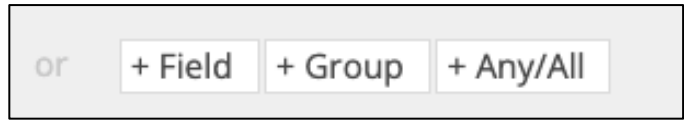
Search results will appear below the search box. Click on any identification name or number to navigate to the edit view for that record. Use the numbers below the results to view additional results pages. You may adjust the number of results per page via the dropdown at the bottom left of the page. Fields returned by the search may be configured by your organization.

## Advanced Search

To navigate to Advanced Search, click Search in the main menu, and then select the record type you’d like to search from the dropdown. From the Advanced Search screen, you may perform a keyword search or search individual fields in a record.

Fill out or select options in each of your desired search fields, then choose the Boolean operator “any (OR)” or “all (AND).” OR will return results that contain the search value you entered in at least one of the fields which you filled out. AND will return results that contain all of the search values in every field that you filled out.

If the field you would like to search is not on the form, click +Field at the bottom and select the field from the dropdown.



Search results will appear below on a new page. Click on any identification number to navigate to the edit view for that record. Use the numbers below the results to view additional results pages. You may adjust the number of results per page via the dropdown at the bottom left of the page.

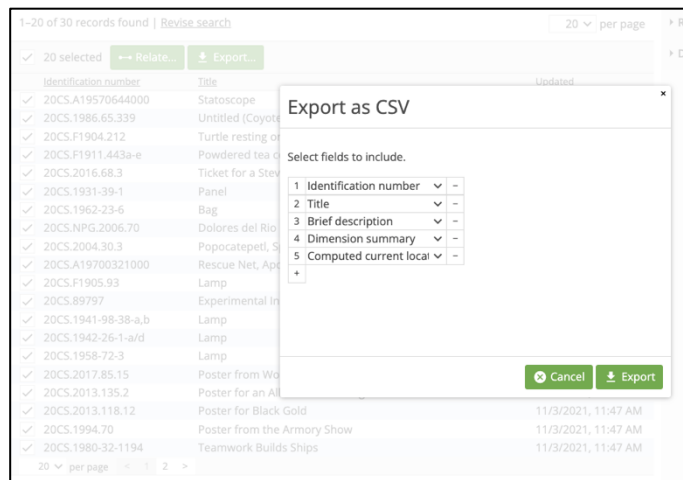
## Reporting

You can run reports in several ways: from search results, from a record, or from the Tools menu.

### Reporting from Search Results

To run an “ad hoc” report from search results:

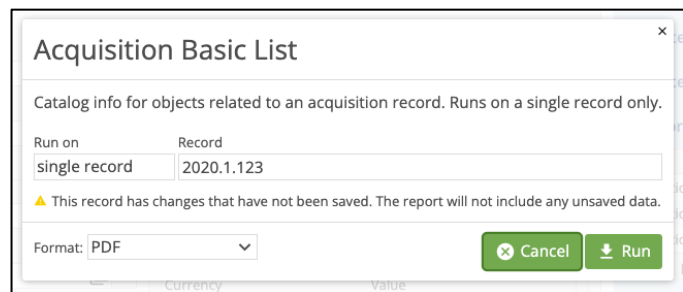
- Run a keyword or advanced search
- From the search results page, select the checkboxes to the left of the Objects you’d like to report on
- Click on the Export button to bring up the ad hoc report builder
- Select the fields you’d like to include in your report
- Click Export and save the file



### Reporting from a Record

To run a report from a record:

- Open a record
- From the right sidebar, select the name of the report you would like to run
- Select your output format from the dropdown (e.g. Word, PDF)
- Click on Run



## Reporting from the Tools Menu

To run a report from the Tools menu:

- Go to Tools and select the Reports tab
- In the left sidebar, click the name of the report
- Click on Run
- Depending on the type of Report, you will need to enter parameters such as the Record ID
- Click on Run

The screenshot shows the 'Tools' interface with the 'Reports' tab selected. On the left, a list of 14 reports is shown, with 'Acquisition Basic List' selected. The main area displays the configuration for this report. The 'Name' field is 'Acquisition Basic List' and the 'Jasper report file' is 'Acq\_List\_Basic.jrxml'. The description is 'Catalog info for objects related to an acquisition record. Runs on a single record only.' Under the 'Runs on' section, the 'Single record' option is checked. The 'For record type' is set to '1 Acquisitions' and the 'Default output format' is 'PDF'. 'Run...', 'Save', and 'Revert' buttons are visible at the bottom right.

## Authorities / Controlled Vocabularies

Authorities include terms used for cataloging and indexing. Authority term records can include associated information about the term, including synonyms, related terms, and source information. Authorities in CollectionSpace can be locally developed or organizations can import existing controlled vocabularies such as the Nomenclature or the Getty Thesaurus of Geographic Names.

### Create New – Create New Menu

To create a new Authority term record, click on the name of the Authority in the Create New menu. Enter information about the term as with any other record type and click Save. The term will now be able to be used in any fields that points to that Authority. To create a synonym for a Term, click on the + sign under the Term box and enter in a second Display Name. Users may search on either name to reach the Term record.

The screenshot shows the 'Person Information' form with two term records. The first record (1) has a 'Display name\*' of 'Joseph Conrad', a 'Name' of 'Joseph Conrad', a 'Qualifier' of 'pseudonym', and a 'Status' of 'accepted'. The second record (2) has a 'Display name\*' of 'Józef Teodor Konrad Korzeniowski', a 'Name' of 'Józef Teodor Konrad Korzeniowski', a 'Qualifier' of 'birth name', and a 'Status' of 'accepted'. Both records have a 'Language' of 'English' and 'Preferred for lang' checked. The form includes fields for 'Name detail' (Salutation, Title, Forename, Middle name, Surname, Addition, Initials) and 'Source' (Name, Detail, ID, Note).



## Create New – In Record

To create a new Authority term while entering information into a record, enter the Term Name into the field and then select “Add” in the small search box. The Term will be added to the Authority, and can be used by other catalogers. To edit information about the Term, click on the Term name in the right sidebar after Save.

**Tip:** Only users with WRITE permission to the Authority can add new terms. Users with READ may select.

## Create Hierarchy

To create a hierarchy, go to an Authority Term record; for example, Europe.

Go to the Hierarchy section at the bottom of the screen. In the Narrower term box, enter the terms you would like to have at the next level of the Hierarchy; for example, under Europe you could add Poland, France, and Spain.

Hierarchy	
Broader place	
<input type="text"/>	
Narrower places	
1	France
2	Poland
3	Spain
+	

## Troubleshooting

- Not sure how to do something? Email the talk list for help from your fellow implementers: [talk@lists.collectionspace.org](mailto:talk@lists.collectionspace.org). Visit <https://lists.collectionspace.org/list/talk.lists.collectionspace.org> to sign up for the talk list if you’re not already a member.
- When in doubt, clear your cache! If you see a strange error message or are unable to do something like upload an image or save an authority term, try saving, logging out, and clearing your browser’s cache. Then log back in and try again. Why do this? “The 'cache' is a tool used by your internet browser to speed up the page loading process. However, sometimes it can cause a problem when websites are updated and developed as files saved in the cache may conflict with what's actually coded into the website. Clearing Cache and Cookies is a way we can be sure that any issues you may come across are actually something wrong with the website, rather than inconsistencies caused by using different browsers.”

Instructions for cache clearing all browser types (and the source of the quote above):  
<https://its.uiowa.edu/support/article/719>