



**AXIELL**  
COLLECTIONS



# **Axiell Collections for Adlib**

## Training Manual

**Axiell ALM Ltd.**

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## Getting Started with Axiell Collections

Axiell Collections is a program for creating, editing, and searching records of items held at a museum, archive, or other heritage organisation. It is web-based, meaning you access it through an internet browser like Google Chrome or Mozilla Firefox. Collections should be used by staff and volunteers—it is not meant for use by the public to search your records. For that, you need a different program.

The first part of this manual (about the next 15 pages) is a guide to get you quickly up and running with Collections, covering the most important tasks: getting in, making records, saving them, and finding items. There is a lot more that can be said about Collections and so the rest of this manual is available if you need it, but there is no need to worry about that at first.

You will walk through creating a sample record and then searching for it in this Quick Start Guide. Any words you see that are underlined throughout this guide have a subsection that explains what they are in greater detail.

If you are more familiar with Collections, or if you have finished 'Getting Started with Axiell Collections', you can skip the first section and move directly to the topic you are interested in in the rest of the manual. The rest of this manual is not intended to be read through from the first to last page in order (although you can certainly do that). Rather, you should find a section from the table of contents that interests you and jump directly to it.

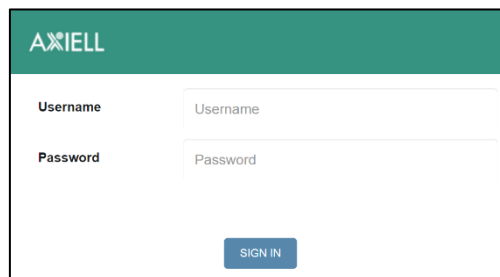
**▲** *This guide is for the default version of Collections—your organisation may have different fields or databases.*

## Start Collections

Each of the steps in this getting started guide is an important task you will probably want to do every time you work with Collections. To make yourself comfortable with the program, this guide is designed so that if you follow it in order, you will have created and then searched for your first record—all in just a few minutes! Let's get started.

1. Open your internet browser
2. Go to the site where your organisation's copy of Collections is

A dialogue box will ask you to log in to Collections



3. Enter your Collections username and password
- i** You can get your username and password from your system administrator.







4. Click 

You are now in Collections. The main menu is at the left and you can choose any option from it and begin working



## The Main Menu

This is displayed at the left of the screen, no matter where you are in Collections. It allows you to navigate the program at a high level, for example by choosing databases to work in or logging out.

	Minimise the <u>main menu</u> to display only the icons.
	Create a new record in a database of your choice.
	Look for records in a database of your choice.
	Change the language Collections uses to display options (but not the language you use to enter data).
	Open the Collections Web Help in a new internet browser tab.
	Log out of Collections.

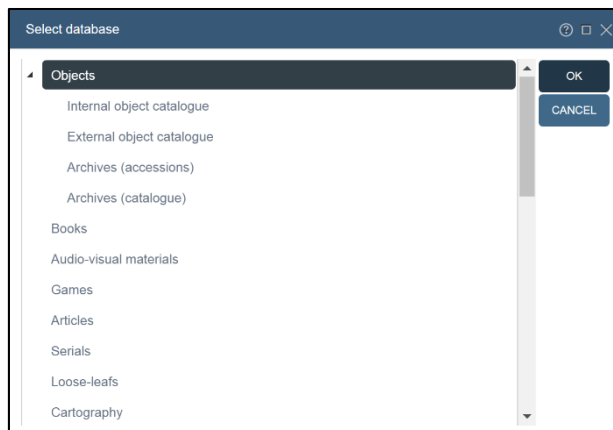
## Create a Record

The Internal object catalogue is, in museums, where records of objects your organisation owns will be stored, so it is probably where you will spend most of your time in Collections. Try creating a record there.

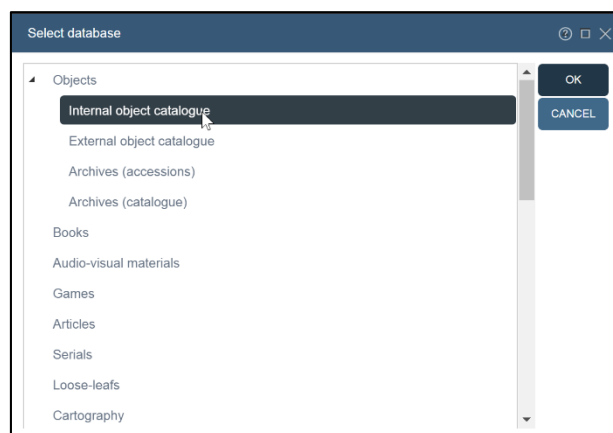
Start anywhere in Collections:

1. Click  **New** on the main menu

A dialogue box will ask you to choose which database you want to create a record in



2. Click the name of the database you want to create a record in



3. Click 

A new record will be created in edit mode




The screenshot shows a web interface for an 'Internal object catalogue'. At the top, there is a dark blue header with navigation icons (back, forward, search, etc.) and a title 'Internal object catalogue'. Below the header is a white bar with the text 'Record details' and a set of icons for document management. The main content area is titled 'Identification' and contains a form with the following fields:

- Institution name: text input with a menu icon
- Institution code: text input
- Administration name: text input
- Collection: text input with a menu icon
- Barcode: text input
- Object number: text input (highlighted in red)
- Rec. type: dropdown menu
- Part: text input
- Tot. number: text input
- Copy number: text input
- Edition: text input
- Distinguishing features: text input
- Current location: text input

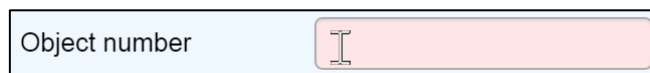
## Databases

Collections is made up of different databases to hold records for different types of information. For example, the Exhibitions database holds records of exhibitions your organisation has put on. Some of these databases (such as Objects) are divided into 'datasets', including the Internal object catalogue dataset. Always be sure to go into the correct database and dataset—if you want to edit records in Internal object catalogue, for example, do not click on Exhibitions or Objects.

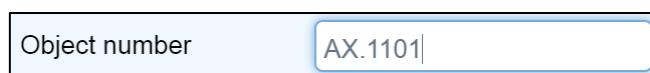
## Edit a Record

Start on a record that is open in edit mode (records that have just been created are in edit mode. If a record is in display mode, clicking  will put it in edit mode):

1. Click in a field you would like to add data to



2. Type in the data you would like to add to the field (if there is an icon at the far right of the field, you may need to click that icon instead. See the table below for how different fields work)









Some fields, called 'mandatory fields', must have data in them. Before you move on, make sure you've filled in the Object number field. So that you can find this record later, it would be a good idea to fill in the Description field. For your first record, enter the details of a decorative globe that displays star positions:

Object number      AX.1101

Description        Brass globe with silver star positions

## Fields

Not all fields work the same in Collections because not all fields need to hold the same type of information. You can tell what sort of information needs to go into a field while in edit mode based on its colour and icons that appear in the far right of the field.

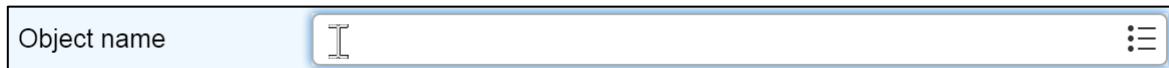
	An exact date in the form YYYY-MM-DD (you may leave off the day or the day and month if you are not certain of them). Click the icon to choose a date from a calendar (or you can type one in).
	An exact time in the form HH:MM:SS. Click the icon to choose a time from a list (or you can type one in).
	An entry from another database. Click the icon or begin typing in the field to see what you can enter. See the next step for more information.
	A list of options. Click the icon to choose from the possible options.
	A file from your computer. Click the icon to choose a file.
	A number. Click the icon to increase or decrease the number (or you can type one in).
[white background]	Any text or numbers. Start typing in the field to enter data.
[grey background]	You cannot type in this field here, but this field likely appears elsewhere on the record, where you can enter data in it.
[blue background]	You cannot type in this field. You will need to find the record this data is on in another database to edit it.
[red background]	This field is mandatory—there must be data in it if you want to save the record.

## Enter Data in a Linked Field on a Record

You've put some data on your record, but before you move on you should try using a linked field. These fields use other databases as sources of information. We are going to enter 'Celestial globe' into the Object name field, so Collections will look in the Thesaurus database to see if it can find a Thesaurus record called 'Celestial globe'. If it can't, it will prompt you to create a Thesaurus record called 'Celestial globe'.

Start on a record that is open in edit mode:

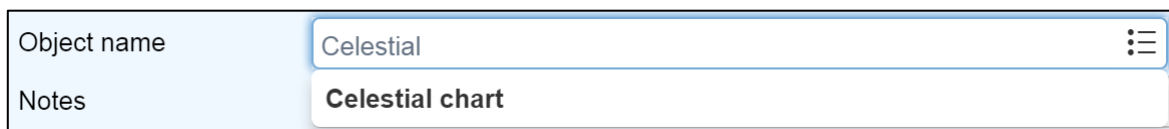
3. Click in a field with a ☰ at right that you would like to add data to



A screenshot of a form field labeled 'Object name'. The field contains a vertical cursor (I) and a menu icon (☰) on the right side.

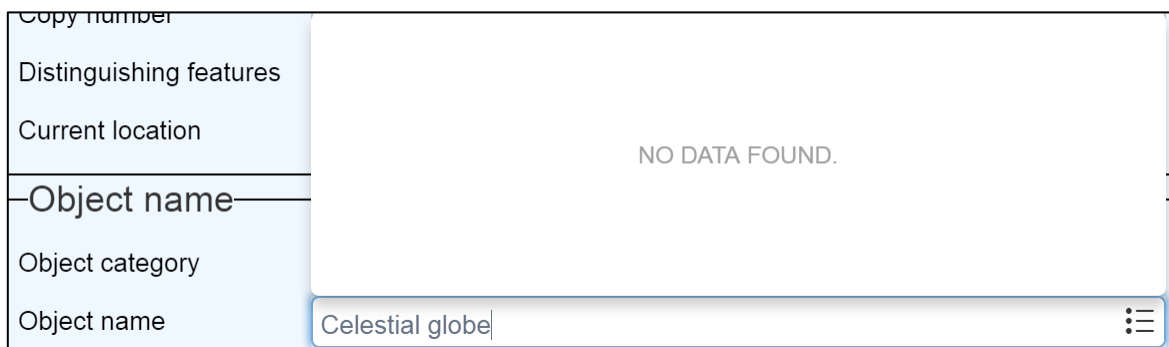
4. Type in the data you would like to add to the field

Collections will show you suggestions from the linked database that match what you are typing in



A screenshot of the 'Object name' field with the text 'Celestial' entered. Below the field, a suggestion 'Celestial chart' is displayed. The 'Notes' field is also visible below the suggestion.

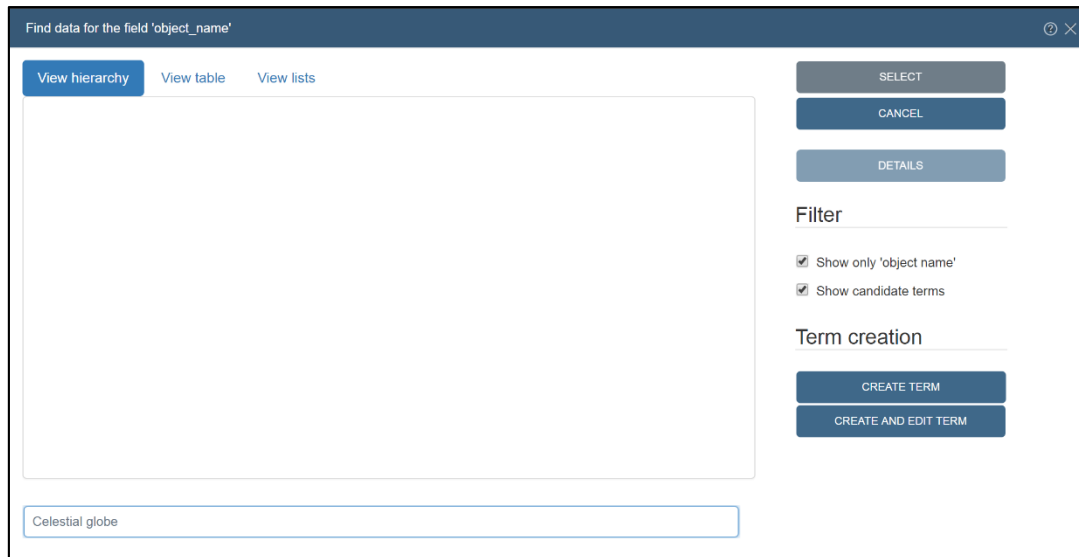
5. If a suggestion matches what you would like to add to the field, click it to fill it into the field and you are done adding data to this field. If a suggestion does not match, finish typing in what you would like to add to the field



A screenshot of a record form. The main area displays 'NO DATA FOUND.'. The 'Object name' field at the bottom contains the text 'Celestial globe' and a menu icon (☰). Other fields visible include 'Copy number', 'Distinguishing features', 'Current location', 'Object category', and another 'Object name' field.

6. Click ☰ in the right of the field

A dialogue box will show you entries in the linked database that match what you typed in and give you the chance to create a new entry



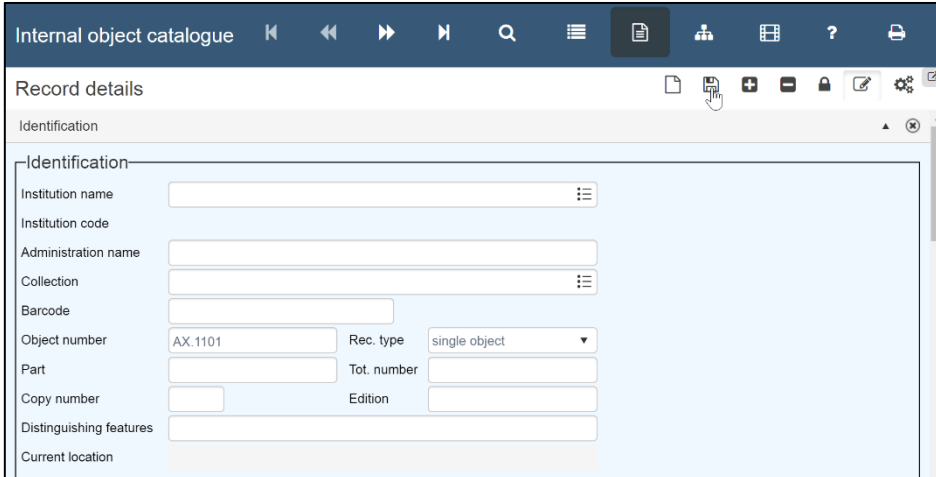
7. Click 

A record for the term you entered has now been created in the database linked to this field

## Save a Record

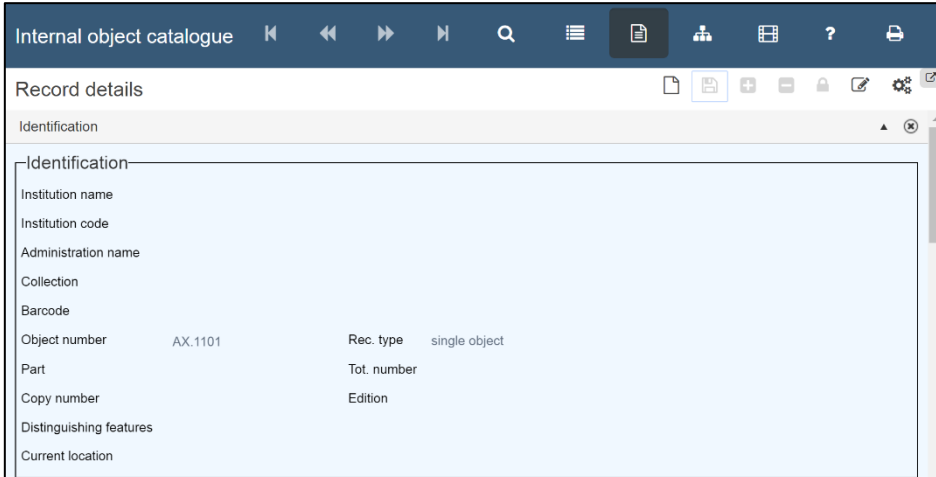
Now that you've put some data on this record, you probably want to save it. Whenever you move away from a record (for example by going to another record or searching a different database), Collections asks whether you want to save the record, but you can also manually save a record. Let's do that now.

Start on a record that is open in edit mode:



1. Click 

Changes you have made to the record will be saved and it will now be in display mode



## Edit Mode and Display Mode

When a record is in edit mode, it can be edited in the record details view. A record in display mode cannot be edited in the record details view. You can tell that a record is in edit mode because all the fields that you can edit will be shown as white or red boxes.

A field in edit mode:

Object number	<input type="text" value="AX.1101"/>
---------------	--------------------------------------

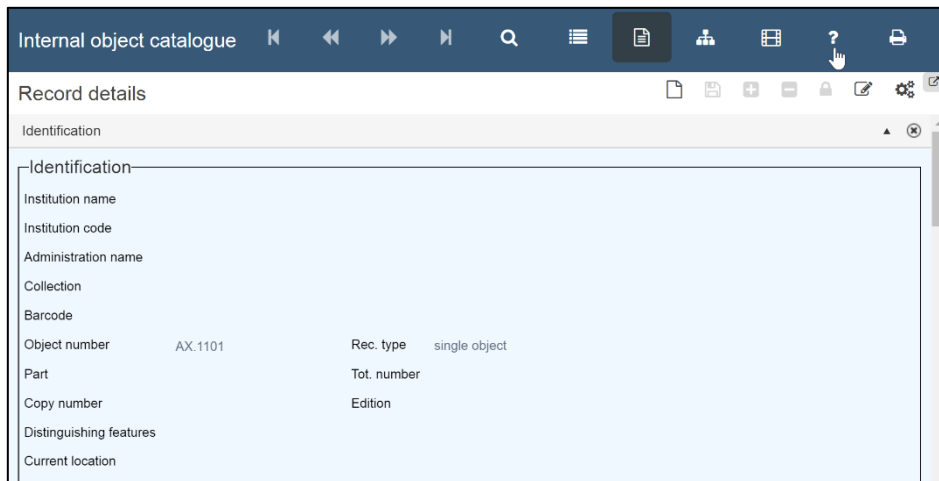
The same field in display mode:

Object number	AX.1101
---------------	---------

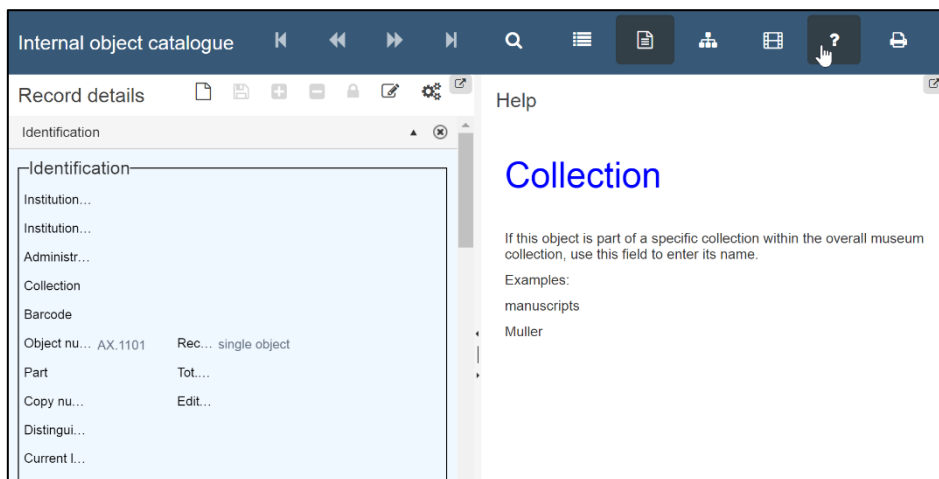
## See a Different View of a Record

Up until now, we have been working in the record details view, which shows you all the fields on a single record and allows you to edit them. However, Collections gives you access to many different views that emphasize different information: for example, the media viewer view shows you all image, video, and audio files linked to the record you are on. Try opening and then closing the help view (?).

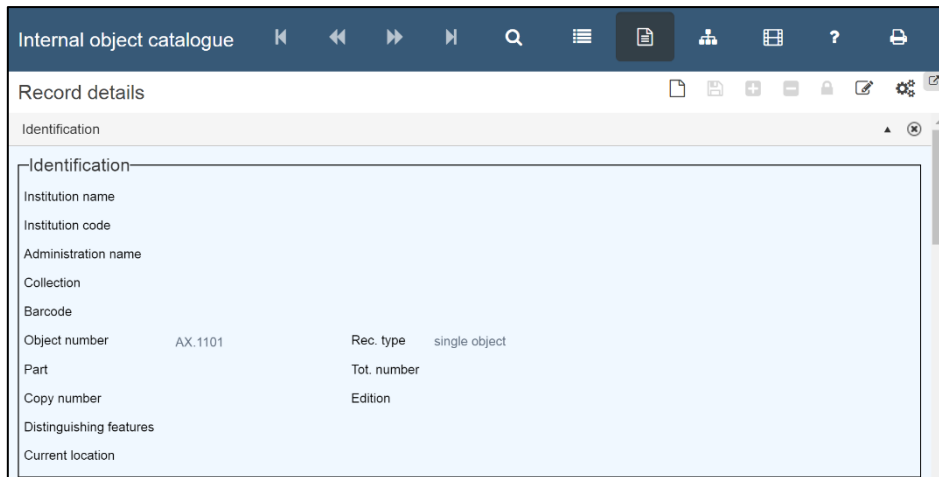
Start on a record in either edit mode or display mode:



1. Click the icon of any view you wish to open (for example ?) on the top toolbar  
The view will be opened alongside any other views you have open

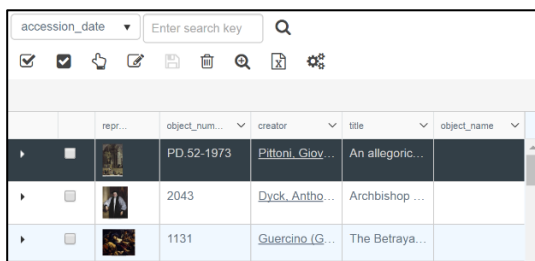


2. Click the icon of any view you wish to close (for example ?) on the top toolbar  
The view will be closed

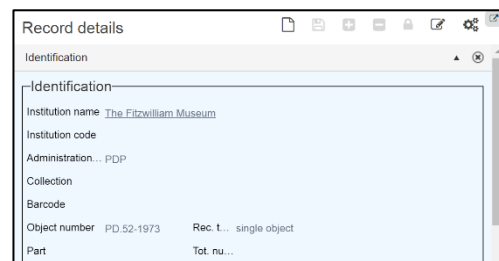


## Views

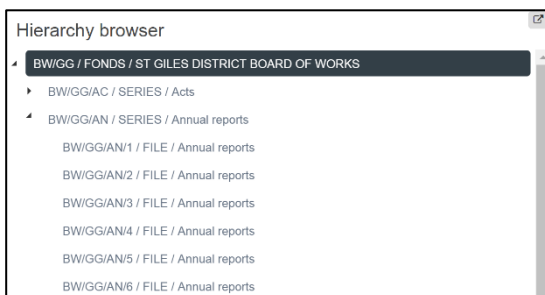
Collections gives you access to eight different views, which are different ways of seeing a record's information. You can use as many views as you think are necessary and hide any you are not currently using. Views are opened and closed using the toolbar at the top of Collections (called the 'top toolbar'). Collections contains the following views, although your organisation might not use all of them:



**Result Set:** A list of all the records you are currently working with.



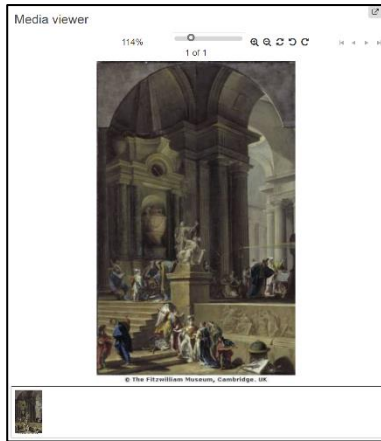
**Record Details View:** All the fields on a single record, called the 'current record'. Most editing happens here.



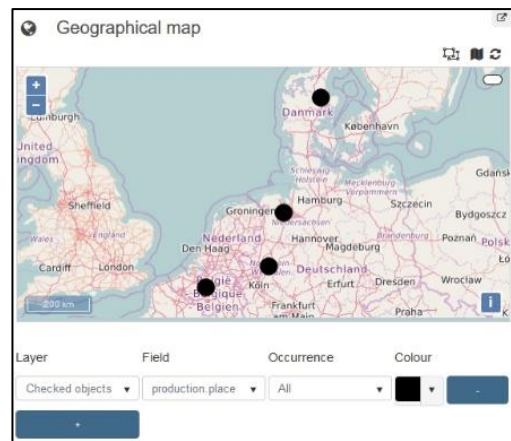
**Hierarchy Browser:** The hierarchy the current record is in. This is mostly used for archive and thesaurus records.



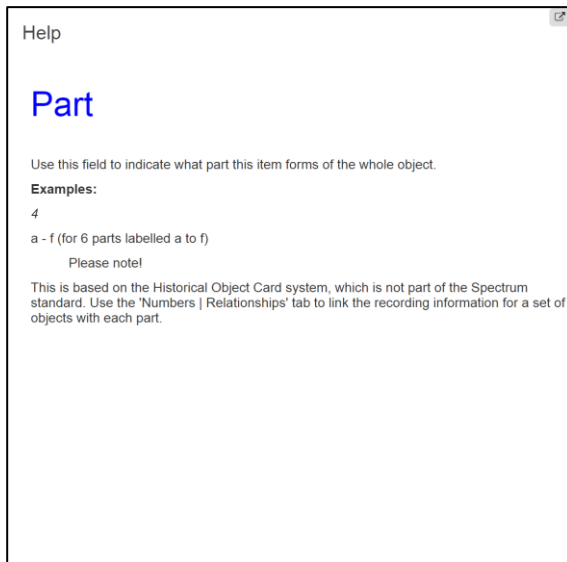
**Related Records:** All the records in other databases linked with the current record.



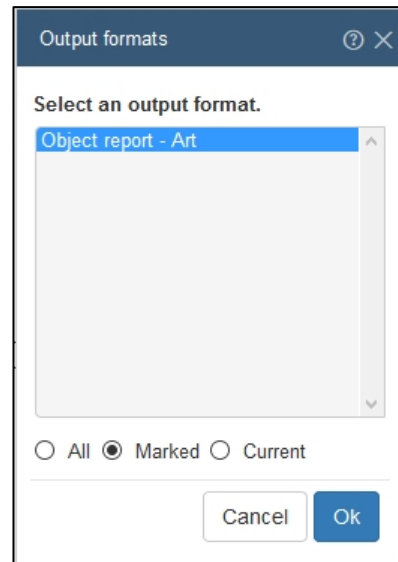
**Media Viewer:** Images, video, and audio linked to the current record.



**Geographical Map:** Places on the current record (and all records selected in the result set view) on a map.



**Help:** Shows information about what you should put in the field that your cursor is hovering over in the record details view.



**Output Formats:** Formats you can use to print data from the current record, records selected in the result set view, or all records in the result set view.



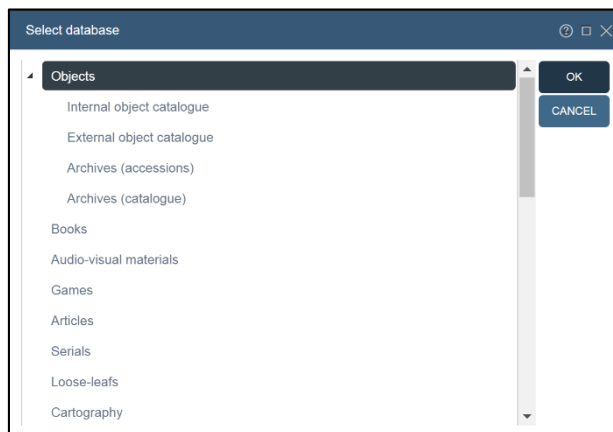
## Search for a Record

You've made a record, so now try to use Collections to find it.

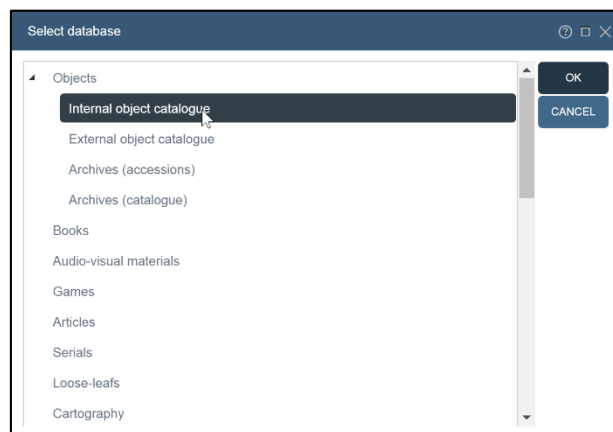
Start anywhere in Collections:

1. Click  Search on the main menu

A dialogue box will ask you to choose which database you want to search in

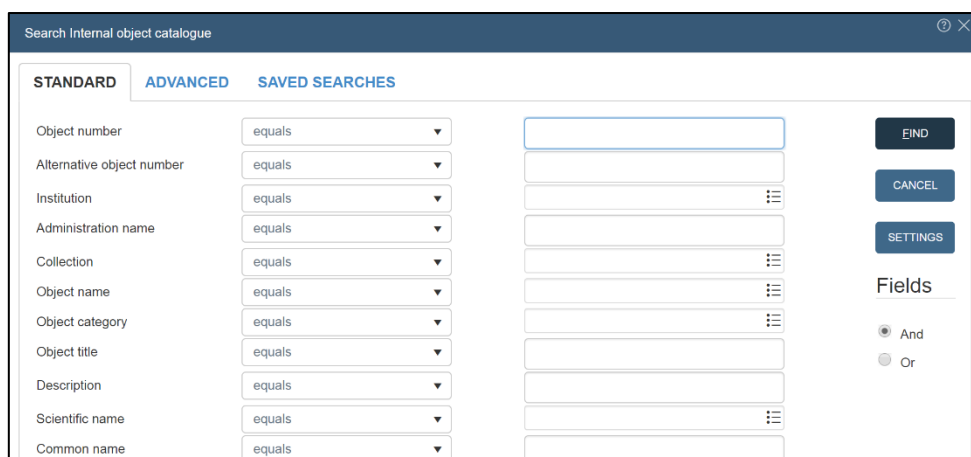


2. Click the name of the database you want to search in



3. Click 

A dialogue box will allow you to run a search



4. Click in a field you wish to search



A search bar with a dropdown menu set to 'equals' and a text input field containing a cursor.

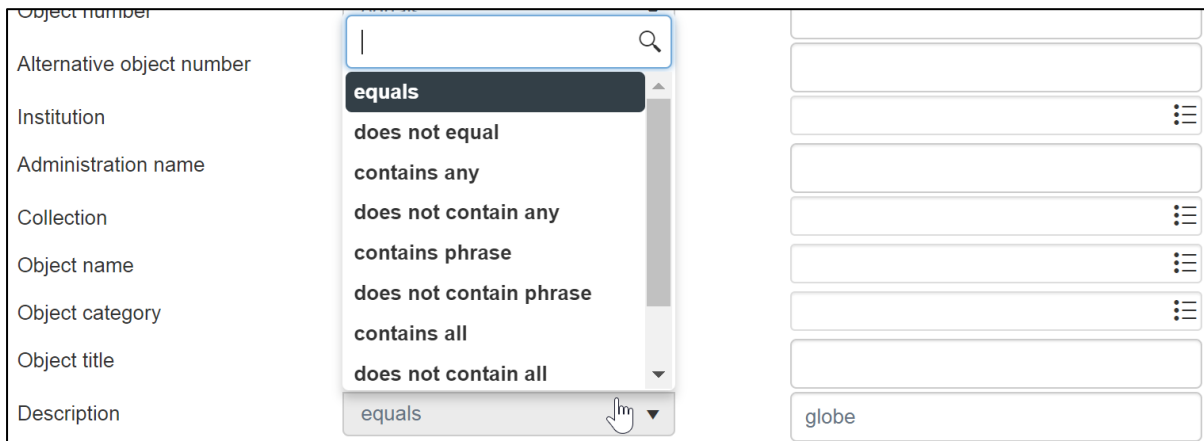
5. Type in a word or words you wish to search for



The search bar with 'globe' entered in the text input field.

6. Click the box with a ▼

A list of possible ways to search will appear



The search bar with a dropdown menu open showing search operators: equals, does not equal, contains any, does not contain any, contains phrase, does not contain phrase, contains all, and does not contain all. The 'Description' field contains 'globe'.

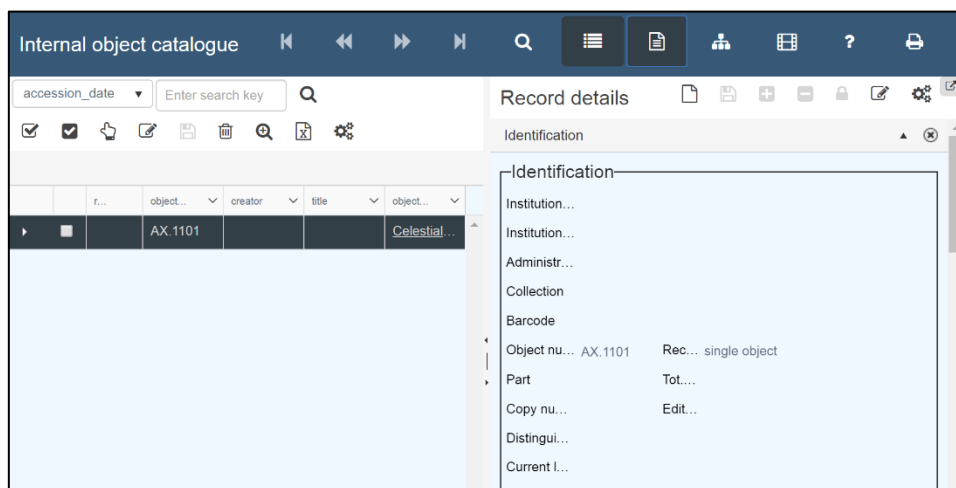
7. Click the way you would like to search the field



The search bar with 'contains any' selected in the dropdown menu and 'globe' in the text input field.

8. Click **EIND**

Any records that match your search will be opened



The 'Internal object catalogue' interface showing search results and record details. The search key is 'globe'. The record details for 'AX.1101' are displayed, including fields like Institution, Collection, Barcode, and Object number.

*Remember, you entered data into several fields when you created the record. Try to find the record you made based on what you entered in the Object name field now.*

## The Search Dialogue Box

In just a small space, the search dialogue box (shown below) gives you lots of options for how to run a search. You can search on more than one field at once by putting text in more than one field. Also, you can change how Collections compares the text you search for to the fields you are searching—whether you would like it to find one of the words you searched for ('contains any') or all the words ('contains all') or to match your search exactly to the field ('equals').

**Equals:** what you type in will exactly match the contents of this field on the records you find

**Contains:** what you type in will be somewhere in this field on the records you find

**Is Empty:** this field will be empty on the records you find

Enter the text that you would like to search this field for

If you have typed into more than one field, choosing 'Or' means that Collections looks for records that match one of these fields, whereas choosing 'And' means that Collections looks for records that match every field

If you want to change the fields that will appear in the search dialogue box, do so here

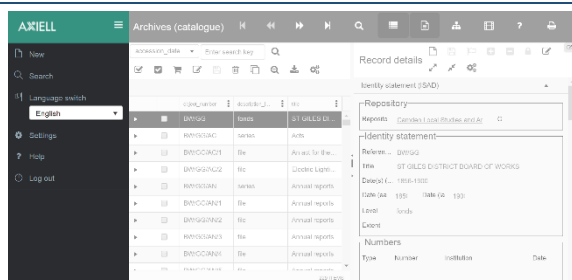


## Getting Around

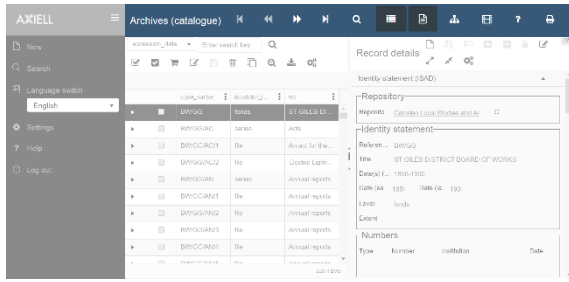
Collections may seem intimidating at first: there are so many places data can be held and so many different types of data that can be entered. Do not panic. Everything in the program boils down to four key concepts: records, databases, fields, and links. While there are hundreds (or perhaps thousands) of fields, they all have the same few basic behaviours. While you can link dozens of fields, links are always made in the same way. For this reason, if you learn how to work a small part of Collections, you will be able to use the entire program.

- A **record** contains all the information you want to record about an item in your collection, or an important person, or a storage location at your organisation, or some other concept.
- Records are separated into **databases**, which hold all records of one kind. For example, all the records of important people are in the Persons and institutions database and all records of storage locations are in the Locations and containers database.
- Records are broken down into **fields**. Each field holds one piece of information about the item: for example, the creator of the object, the date it was created, or a material it was made from. Fields can behave differently depending on the information they hold: a date field is used differently from a field that would hold a title, for example. The more fields there are (and the less information is packed into one big generic Notes field), the easier it is to search for, report on, and edit your data.
- **Links** between records indicate that there is a relationship between the records. For example, you could link the record of an item to the record of its creator. This saves you time (you do not have to re-enter the creator's information every time they reappear) and makes it possible to work with each record independently (reporting on all creators, for example).

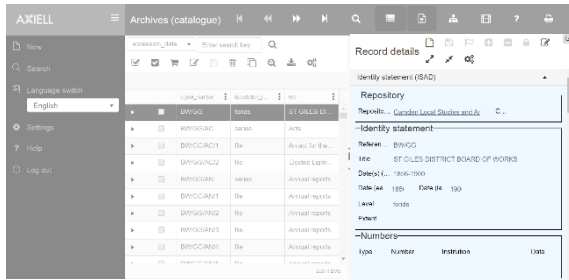
### The Layout of Axiell Collections



The **main menu** always sits at the left in Collections. It allows you to navigate at a high level, for example by changing the database you are working in.



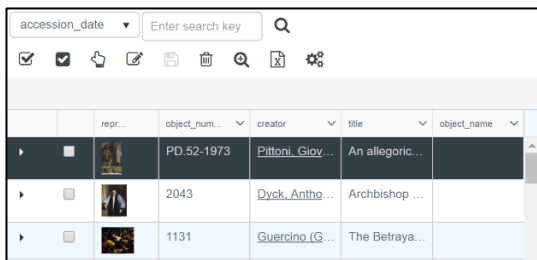
The **top toolbar** sits at the top of the screen and allows you to work within the database. You can flip between records, search, or choose which views you use—all in the current database.



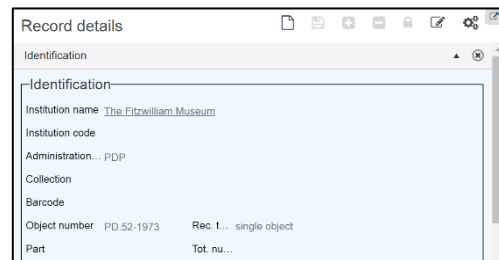
**Views** take up most of the screen and allow you to see different information about one or more records. Multiple views can be open at once. Each view often has its own toolbar of icons that you can use with that view (beside 'Record details' in this image).

## Available Views

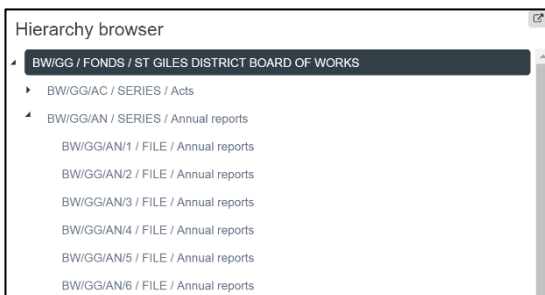
Collections gives you access to eight different views, which are different ways of seeing a record's information. You can use as many views as you think are necessary and hide any you are not currently using. Views can also be opened in a new internet browser window to make more room in the main Collections window. Collections contains the following views, although your organisation might not use all of them:



**Result Set:** A list of all the records you are currently working with. More information is available in Using the Result Set View on page 55.



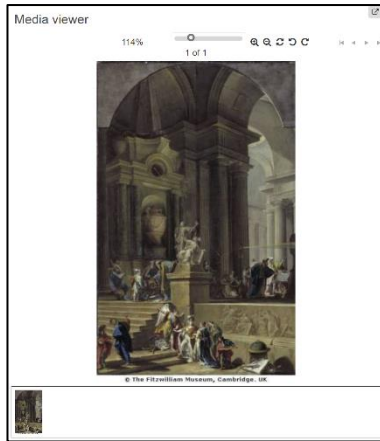
**Record Details View:** All the fields on a single record. Most editing happens here. More information is available in Using the Record Details View on page 31.



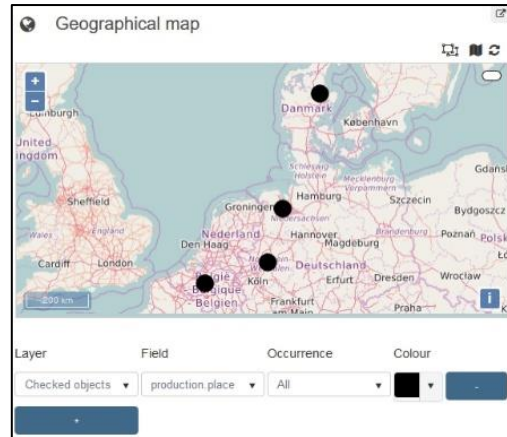
**Hierarchy Browser:** The hierarchy the current record is in. This is mostly used for archive and thesaurus records.



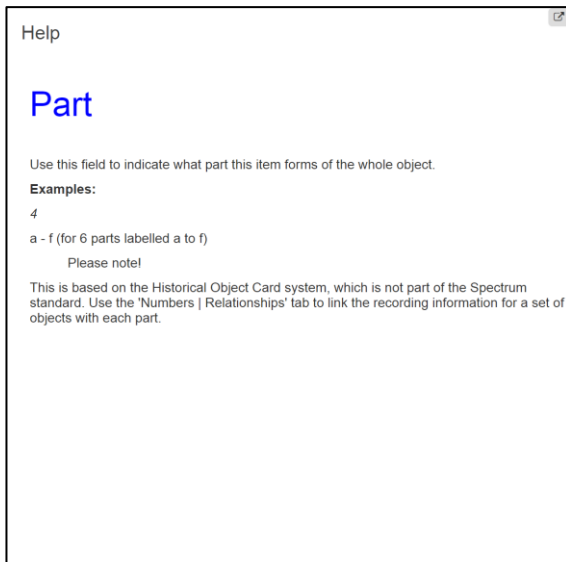
**Related Records:** All the records in other databases linked with the current record.



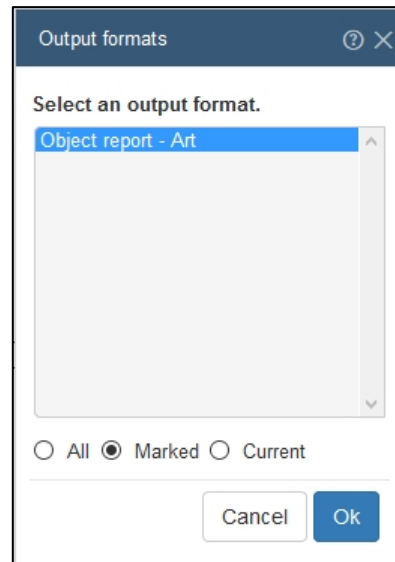
**Media Viewer:** Images, video, and audio linked to the current record.



**Geographical Map:** Places on the current record (and all records selected in the result set view) on a map.



**Help:** Shows information about what you should put in the field that your cursor is hovering over in the record details view.



**Output Formats:** Formats you can use to print data from the current record, records selected in the result set view, or all records in the result set view.


## To Get Help

Any time you need help in Collections, look for a question mark. Anywhere you are in the program, you should be able to access one or more of these: they will open either the full web help (where you can search for an answer), a specific section of the full web help, or help specific to the field you are in.

Start anywhere in Collections:

1. Click  Help

The Collections web help will be opened

2. If you are in a dialogue box, many have a button in the upper right corner. Click 

The Collections web help will be opened to a section about that dialogue box

3. If you have one or more records open, click  on the top toolbar

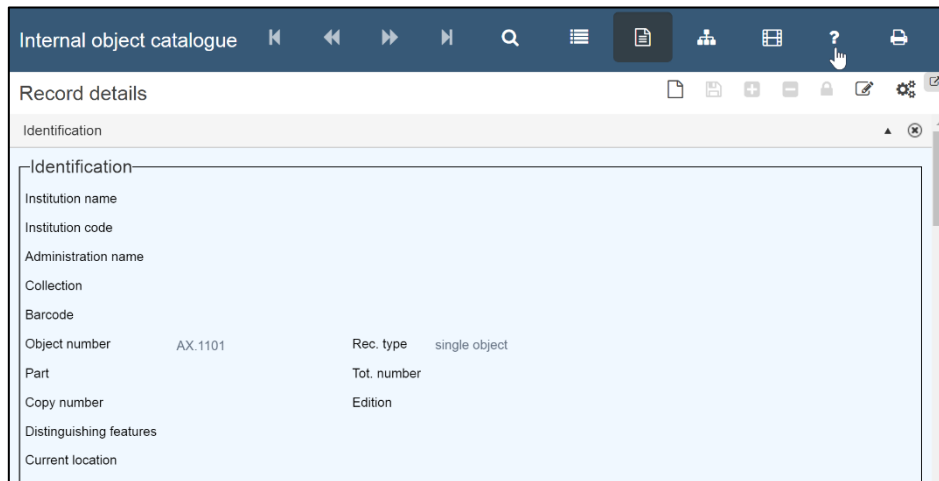
A view will be opened showing what sort of information should be filled in to the field your cursor is currently in




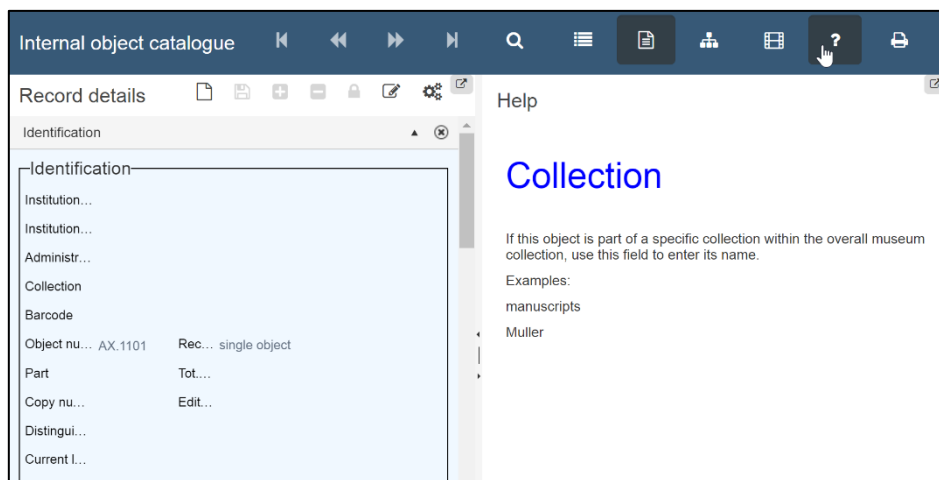
## To Change Which Views are Open


There are many views you can use to change what sort of data you look at (for a full listing, see Available Views on page 22). If you don't have enough space on your screen, try closing some views! if you need more information, try opening some views.

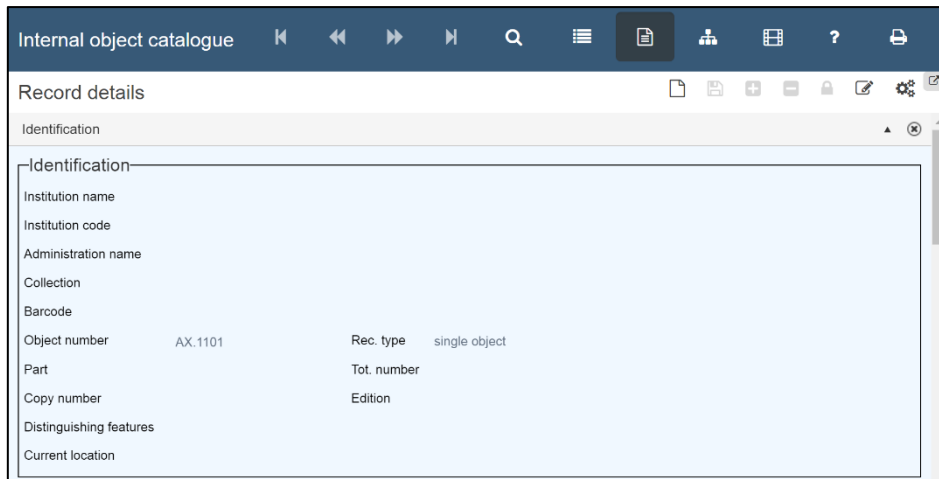
Start on a record:



1. Click the icon of any view you wish to open (for example ) on the top toolbar  
The view will be opened alongside any other views you have open



2. Click the icon of any view you wish to close (for example ) on the top toolbar  
The view will be closed

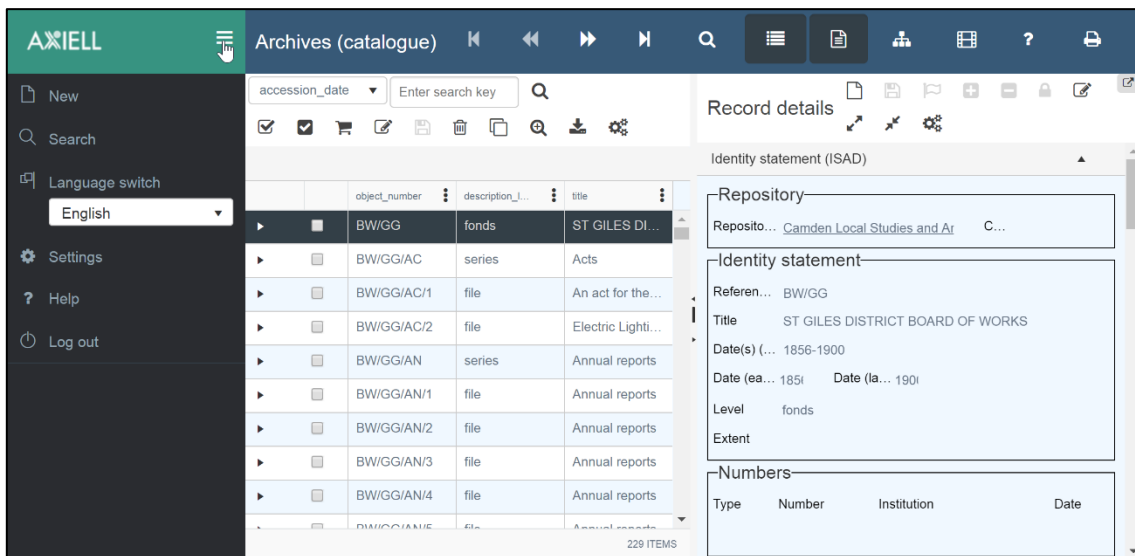



**⚠** *It is possible to turn off all views. If you do this, the records you have been working with are still open, you just cannot see them. Click a view icon on the top toolbar to turn it back on and see the records.*

## To Make More Space in the Collections Window



If you do not have enough space to see everything you need to, consider hiding unnecessary views (covered in To Change Which Views are Open on page 25) or unnecessary screens in the record details view (covered in To Change Which Screens Are Open in Record Details View on page 39). In addition to these, there are many more tweaks you can make to get more space where you need it.

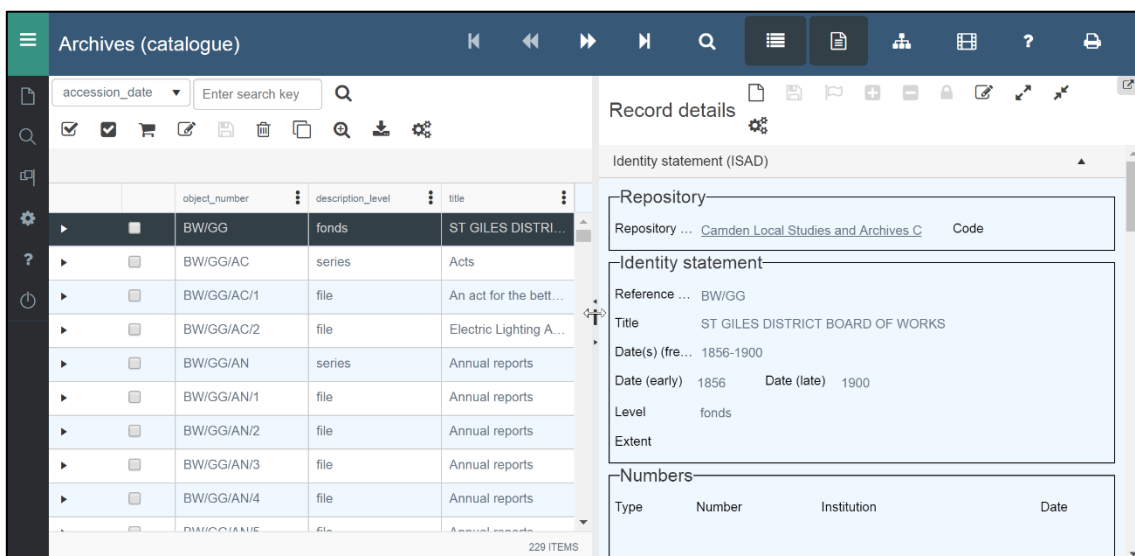
Start in a database in Collections:



1. Click  on the main menu

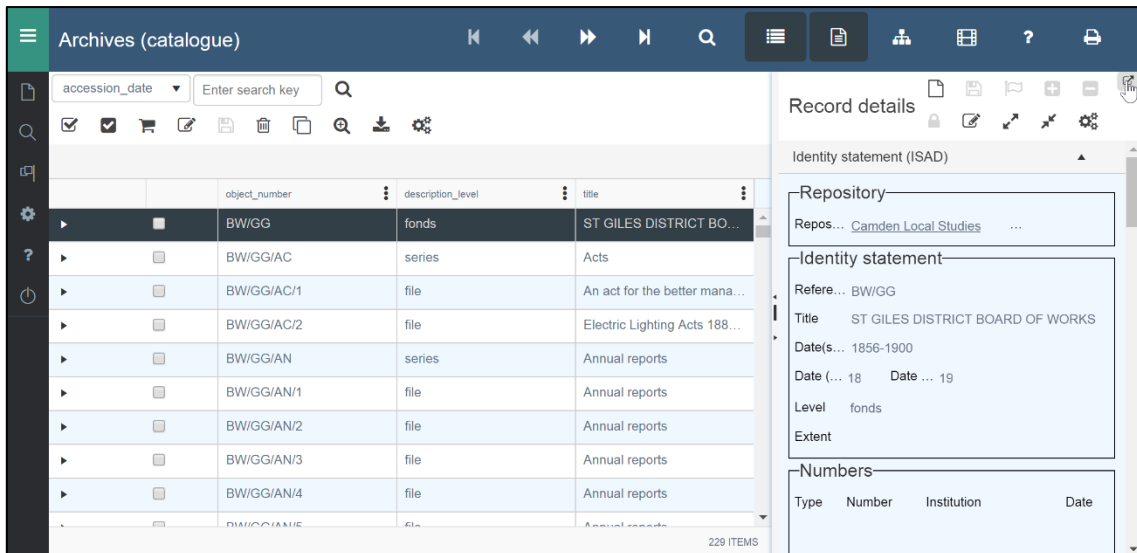
The main menu will be minimised, displaying only the icons


-  Clicking  again will display the text beside the icons again.



2. Click and drag the  between two views to the left or right

One view will be wider and the other view will be narrower

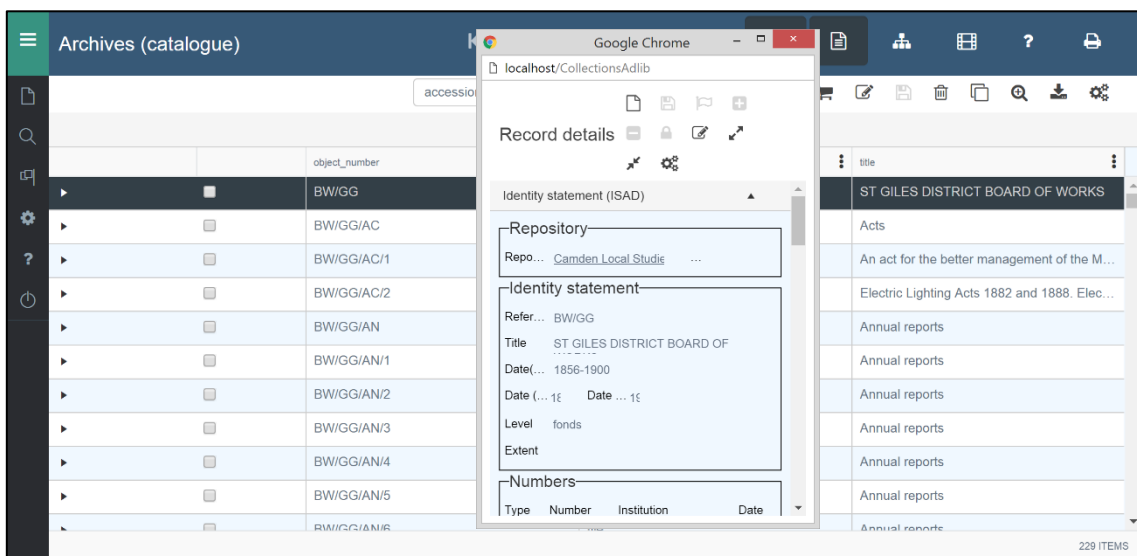


3. Click  in the top right of a view

That view will be opened in a new internet browser window

**i** Having a view in a different browser window allows you to move it independently of your main browser window (much like if you had two documents open in a word processor). If you have two monitors, you can have one window on one monitor and the other window on the other.

**!** This works with every view except the result set view.



4. Click  in the new browser window

The new browser window will be closed and that view will be reopened in the main Collections window

### *To Change the Text Size*

Text size in Collections depends on your internet browser, but most modern browsers allow you to zoom in or out. This will increase or reduce the text size, respectively. In Google Chrome, for example, holding CTRL and clicking + or scrolling the mouse wheel forward will zoom in (and increase the text size), while holding CTRL and clicking - or scrolling the mouse wheel backwards will do the opposite. For more information about this, look up your preferred internet browser's help documentation.



## Working with a Single Record

This section covers work that you can do with a single record in Collections—in other words, the detailed cataloguing or editing that may involve many fields or obscure fields. For that reason, it focusses on the record details view, where in-depth work is best done.

The first part, *Using the Record Details View*, looks at the major tasks around creating, editing, and viewing a record, including finding the fields you want to work with, checking your spelling, and attaching images (or other media) to records.

The second part, *Linked Fields*, covers one type of field in more depth. Because they make connections between databases, there is much more that can be done with linked fields than with other fields—for example, you can use them to create records in other databases. This covers most of the major functions that can be done with linked fields, including looking at their dialogue box in more detail.















## Using the Record Details View

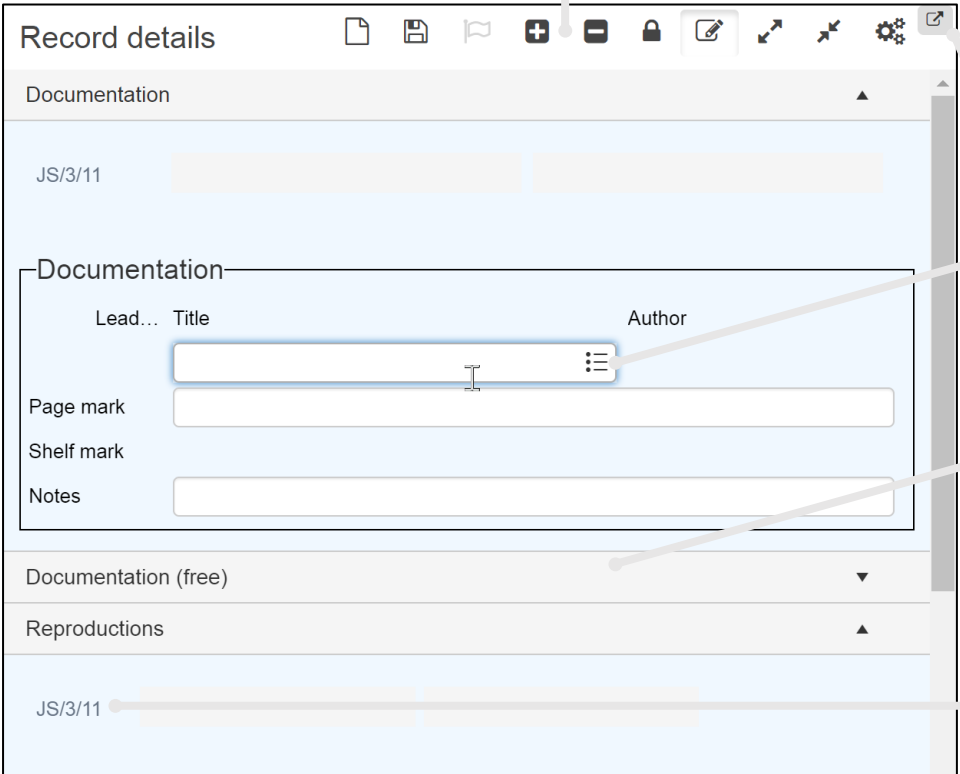
Much of your work in Collections will be done with a single record at a time—entering data, investigating a search result, or editing a record to fix an incomplete field, for example. When doing this, you will likely be working in the record details view, which lays out every field available on the record in a scroll-like view.

The record details view is separated into a series of screens which break the record down into smaller, related groups of information (for example, all the information about where an item is, when it moved there, and who moved it). These screens can be closed or hidden away entirely if you do not need to see them.

### Record Details View



The context toolbar. It contains the following commands:

	Make a new record		Prevent editing of this field
	Save the record (put in view mode)		Switch between edit & view mode
	Enter a translation		Open all screens
	Add an occurrence of this field		Close all screens
	Remove this occurrence of a field		Choose which screens appear



The screenshot shows the Record Details View interface. At the top is a context toolbar with icons for creating, saving, translating, adding/removing occurrences, locking, editing, opening/closing screens, and settings. Below the toolbar is a scrollable area with several sections: 'Documentation' (containing a field with 'JS/3/11'), another 'Documentation' section with a table (columns: Lead..., Title, Author) and input fields for Page mark, Shelf mark, and Notes, and 'Documentation (free)' and 'Reproductions' sections. Callouts on the right side point to specific elements: 'Open this view in a new browser window' points to the top-right corner; 'A field, ready for data to be entered' points to the 'Title' field in the table; 'A screen heading—click it to see all or hide all fields on the screen' points to the 'Documentation' heading; and 'A field that must be edited elsewhere' points to the 'JS/3/11' field in the 'Reproductions' section.







### View Mode & Edit Mode

Records can either be in view or edit mode. View mode allows you to see a record without making changes to it; whenever you run a search, the results will be in view mode. Edit mode allows you to change a record; whenever you create a record, it will be in edit mode. Swapping between the two of them is easy:  moves a record into edit mode and back to view mode again, or you can click  to put a record in edit mode into view mode.

A field in edit mode:	Object number	<input type="text" value="AX.1101"/>
The same field in display mode:	Object number	AX.1101

## Field Types

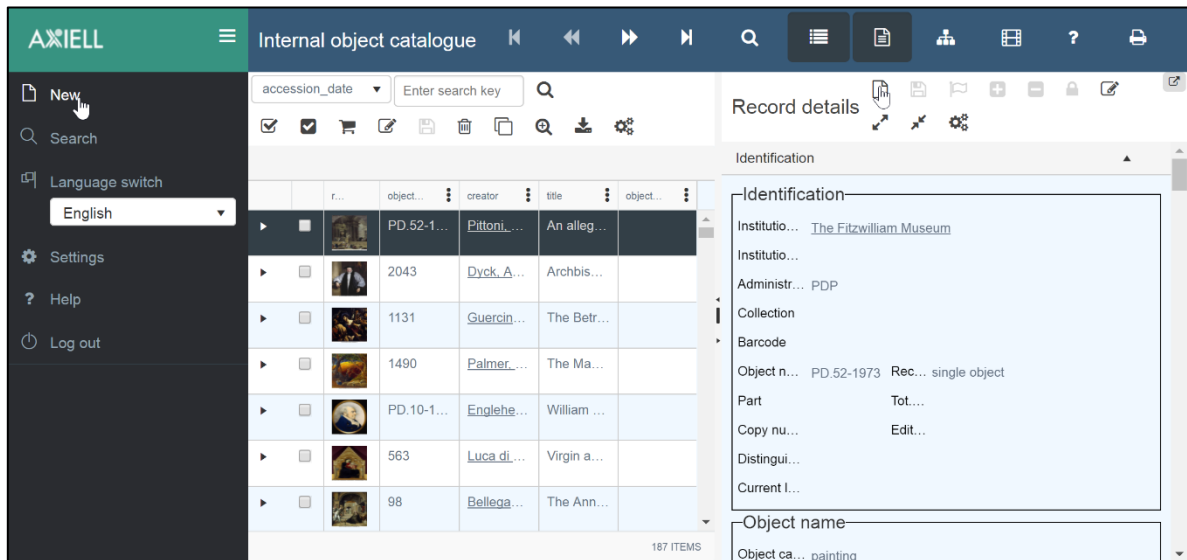
Not all fields work the same in Collections because not all fields need to hold the same type of information. You can tell what sort of information needs to go into a field while in edit mode based on its colour and icons that appear in the far right of the field.



	An exact date in the form YYYY-MM-DD (you may leave off the day or the day and month if you are not certain of them). Click the icon to choose a date from a calendar (or you can type one in).
	An exact time in the form HH:MM:SS. Click the icon to choose a time from a list (or you can type one in).
	An entry from another database. Click the icon or begin typing in the field to see what you can enter. See Linked Fields on page 43 for more information.
	A list of options. Click the icon to choose from the possible options.
	A file from your computer. Click the icon to choose a file.
	A number. Click the icon to increase or decrease the number (or you can type one in).
[white background]	Any text or numbers. Start typing in the field to enter data.
[grey background]	You cannot type in this field here, but this field likely appears elsewhere on the record, where you can enter data in it.
[blue background]	You cannot type in this field. You will need to find the record this data is on in another database to edit it.
[red background]	This field is mandatory—there must be data in it if you want to save the record.

## To Create a Record

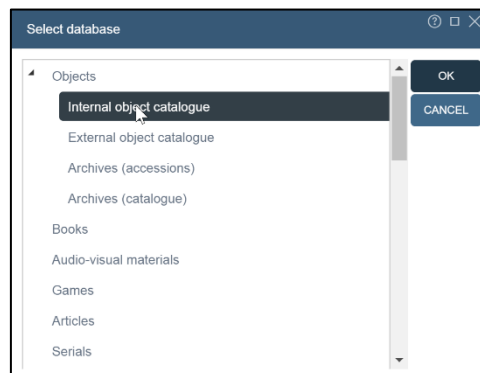
Records, in any database, can be created either from the main menu or from within the database. Either way, the result is the same: a blank record that you can use to catalogue from scratch.


Start anywhere in Collections:



1. Click  **New** on the main menu. Or, if you are already in the database you wish to create a record in, click  (if you do this, skip directly to step 3)


A dialogue box will ask you to choose which database you want to create a record in



2. Click the name of the database you want to create a record in
3. Click 

A new record will be created in edit mode

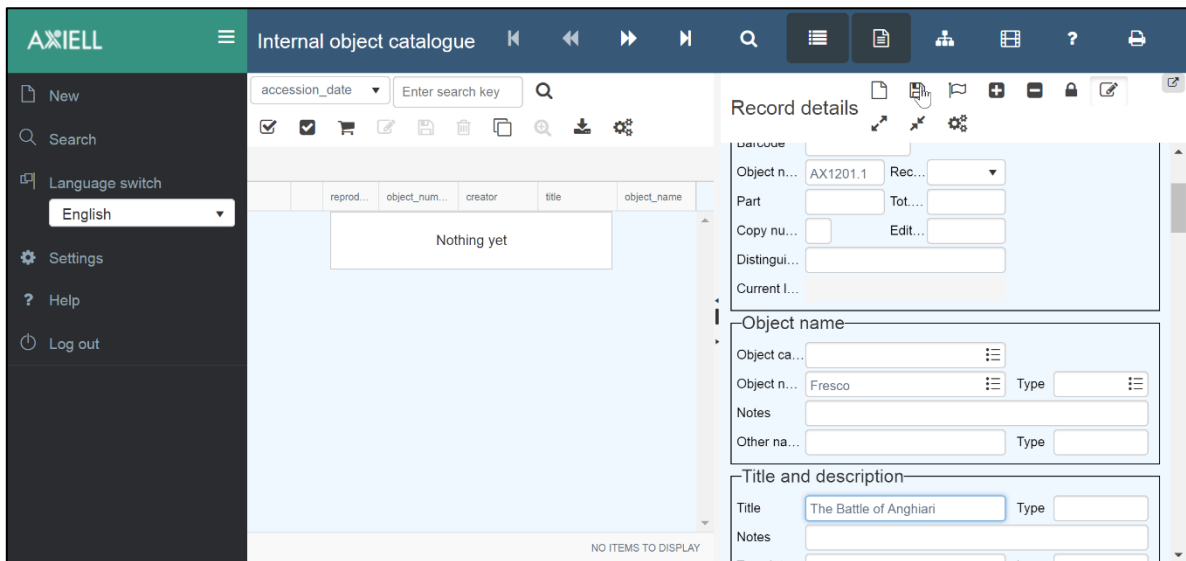
4. Enter data into every field you wish to add data to on the record

**i** *Not all fields work the same. A different background colour (that is not just white) or an icon in the far right indicates this. See Using the Record Details View on page 33 for more indication about how these fields behave. If the field has a  at the far right it is a linked field; the section Linked Fields on page 43 has more information about using them.*

5. Enter data into every mandatory field on the record

**i** Mandatory fields have a red background.

**!** If a mandatory field does not have data in it, you cannot save the record.



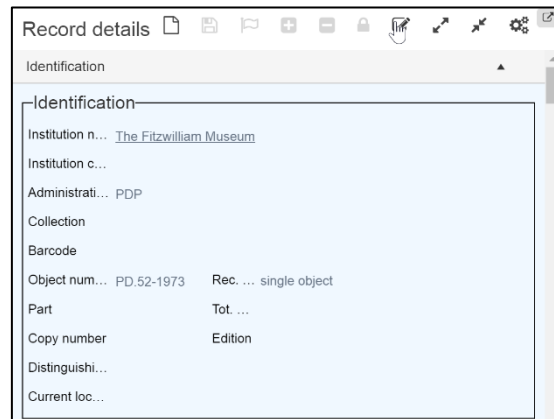
6. Click 

The record will be saved and it will enter view mode

## To Edit a Record That Already Exists

You can edit any record that already exists in Collections, whether it's for a small tweak to remove extra punctuation or to almost entirely fill out a record that was barely begun.


Start on a record:



1. Click 

The record will now be in edit mode

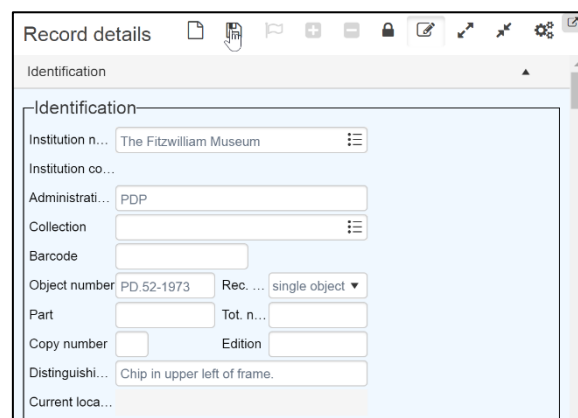
2. Make any changes you wish to on the record

**i** Not all fields work the same. A different background colour (that is not just white) or an icon in the far right indicates this. See *Using the Record Details View* on page 33 for more indication about how these fields behave. If the field has a  at the far right it is a linked field; the section *Linked Fields* on page 43 has more information about using them.

3. Enter data into every mandatory field on the record

**i** Mandatory fields have a red background.

**!** If a mandatory field does not have data in it, you cannot save the record.



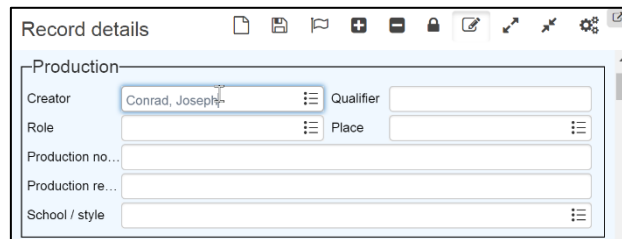
4. Click 

The record will be saved and it will enter view mode

## To Add Another Occurrence of a Field

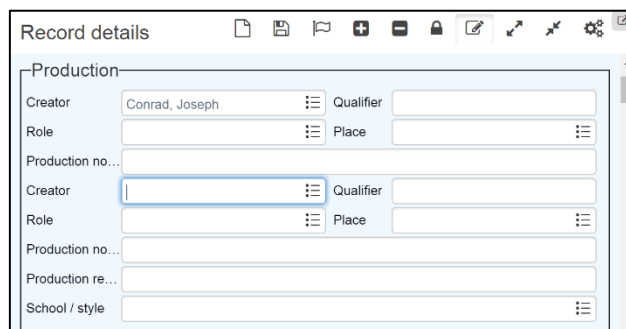
In many cases, one field is not enough: an object you are cataloguing may have multiple creators or it may be made from multiple materials. Putting all of this information in one field is not a good idea: a Creator field that says 'Conrad, Joseph & Ford, Ford Madox' will link to a Persons & institutions record of the same name. This means Persons & institutions could hold a 'Conrad, Joseph' record and a 'Conrad, Joseph & Ford, Ford Madox' record, which makes indexing and searching much harder. In cases like this, it is far better to add an extra occurrence of the field.

Start on a record in edit mode:



1. Click in the field you wish to add an extra occurrence of
2. Click **+** at the top of record details view

A new occurrence of the field and any other fields that are grouped with it will be added to the record

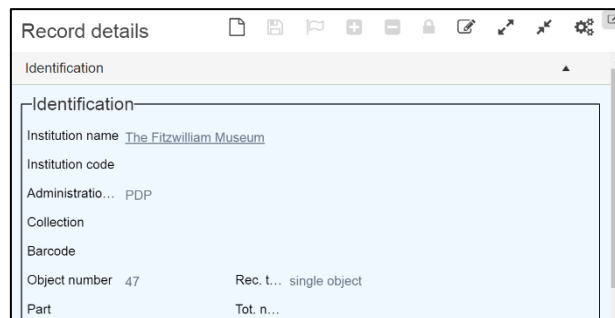


- i** Occurrences of a field (or group of fields) can be removed by clicking **-** when your cursor is in the field. Be careful, as this will also delete any data in this occurrence of the field.

## To Change Which Screens Are Open in Record Details View

Fields are divided up into screens of related fields (for example, a screen for an item's current location) to make them easier to work with. You can change which screens are open depending on what you need to do. For example, if you are just recording locations, you may want to close all other screens, whereas if you are checking to see how complete a record is, you may want all screens open.

Start on a record:

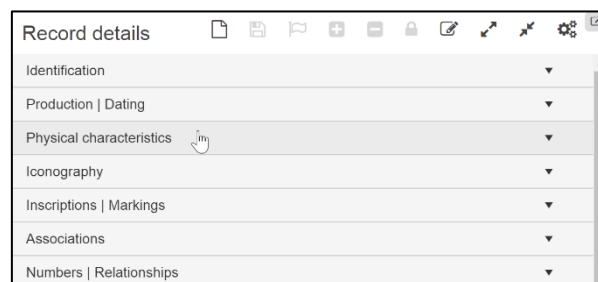


1. Click 

All screens will be opened

2. Click 

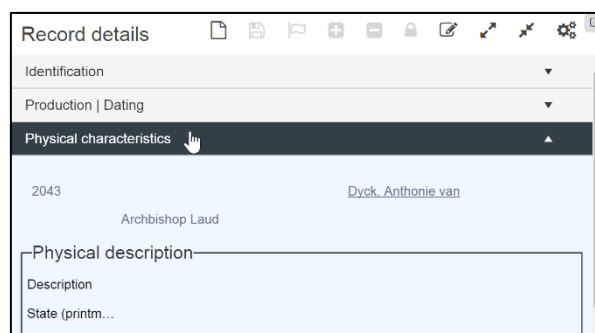
All screens will be closed



3. Click the tab of a closed screen

**i** Closed screens have a ▼ at the right, open screens have a ▲ at the right

That screen will be opened



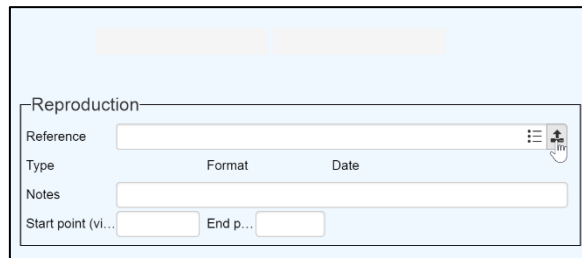
4. Click the tab of an open screen

That screen will be closed

## To Add an Image, Video, or Audio File to a Record

There are two main ways of attaching images, videos, and audio files to records in Collections. This method ensures that you can view the attached media in both the media viewer and the result set view. The formats supported are limited by the internet browser you are using and HTML5: generally these include jpeg, tiff, bmp, gif, svg, png, mp3, wav, opus, ogg, mp4, and webm.

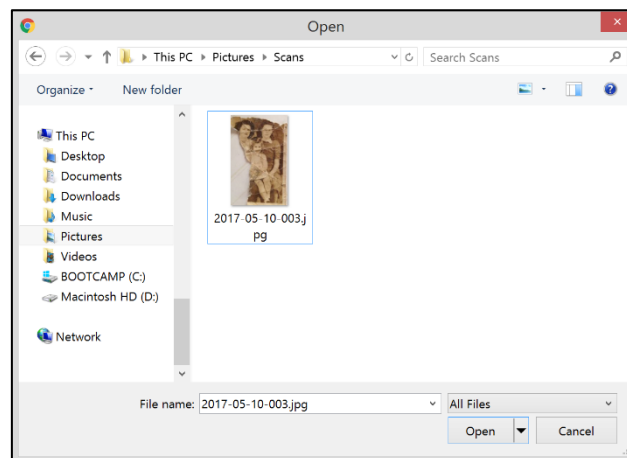
Start on a record in edit mode:



1. Click  at the right of a field which is used to link to images

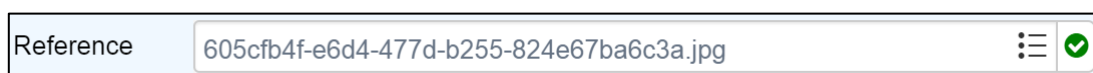
**i** In default Collections systems, the field that links to images is the Reference field, which is found on the Reproductions screen.


A dialogue box will open. How it looks will depend on which internet browser you are using



2. Find the image and attach it using the dialogue box

The image will now be attached to the record



A copy of it will be renamed and moved into the folder designated to hold images in Collections. A record for the digital file will be created in the Multimedia documentation database. Once you save the record, the image will be visible in the media viewer (opened by clicking  on the top toolbar)



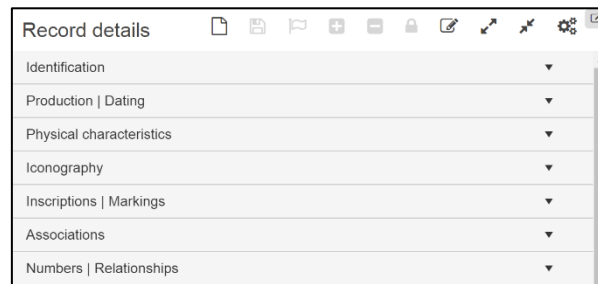
### *To Check Spelling on a Record*

Spell-check is not supported in Collections. However, most modern internet browsers feature spell-check: Google Chrome, for example, checks your spelling as you type, underlines misspelled words, and allows you to right-click them for correct spelling suggestions. For more information about how to enable spell-check in your preferred internet browser, look up that browser's help documentation.

## To Find a Field on a Record

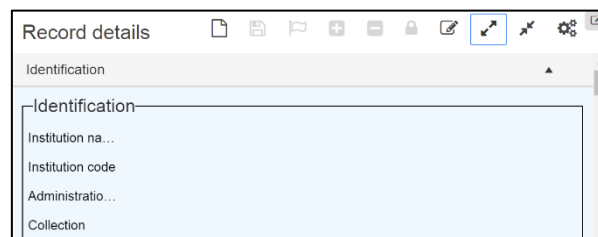
A full Collections record can have hundreds of fields. Especially if you are new to the program, finding one field in here can be daunting. Fields are gathered into screens to make it easier to find them (every field about an item's conservation is under the same tab, for example) but you can also search for an individual field.

Start on a record:



1. Click 

All the screens will be opened

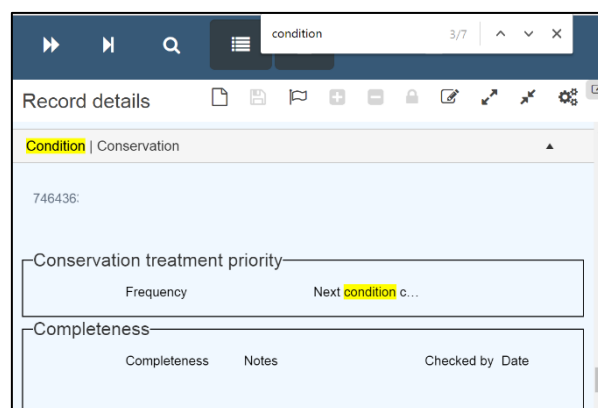


2. Press CTRL and F on your keyboard

A box will open in your internet browser

3. Enter part of the name of the field you are looking for

Words that match what you have entered will be highlighted



4. Press ENTER on your keyboard

Your browser will jump between different words that match what you have entered

**⚠** The exact details of how this works may vary based on the internet browser you use. These screenshots used Google Chrome.

## Linked Fields

Many fields on a record are 'linked fields', which means that for every entry in that field, there is a record in another database. For example, the Creator field links to the Persons & institutions database. If you enter 'da Vinci, Leonardo' into the Creator field, it will connect to the Persons & institutions record of that name.

Linking records like this has many advantages:

- Because you are choosing from a list, if you make an error (typing 'da iVnci, Leonardo') or enter the term in a different way (typing 'Leonardo da Vinci'), Collections will correct you
- If you need to make a change to the name (deciding you prefer 'da Vinci, Leonardo (1452-1519)' to 'da Vinci, Leonardo'), you just need to change it on the record for the term (in this case in the Persons & institutions database) and it will be changed everywhere it appears
- The record for the term can hold much more information about it—a person's biography, a subject term's scope note, details about the condition of a location where you store items, etc.

Linked fields are easy to recognise on a record: when in edit mode or the Standard Search dialogue box, they all have ☰ in the far right. This is a button that can be clicked to open the link dialogue box. When in view mode, the contents of linked fields are underlined like a link on the internet and can be clicked to view the record they link to.

## The Link Dialogue Box

The screenshot shows a 'Find data for the field 'association subject'' dialog box. It features a search input field at the bottom left, a list of terms in the center, and a right-hand panel with buttons for 'SELECT', 'CANCEL', 'DETAILS', and 'Filter' options. The 'Filter' section includes checkboxes for 'Show only 'geography'' and 'Show candidate terms'. The 'Term creation' section has buttons for 'CREATE TERM' and 'CREATE AND EDIT TERM'. Callout boxes provide instructions for each part of the interface.

Change how terms are shown

Click a term you want to use to select it

Add the selected term to the record you are editing and close the link dialogue box

Open a zoom screen with the full record of the selected term

If ticked, you will only see terms that have been used in this field before

If ticked, you will also see terms that are not fully approved yet

Enter the beginning of the term you are looking for to filter the list above or enter the term you want to create

Create the term you entered. 'Create and Edit' opens it in a zoom screen so you can add more information

When you are trying to make a link, you will often use the link dialogue box. It is possible to link records together without using it, but you have significantly fewer options.

## The Zoom Screen

These work the same as in record details view

Expand the zoom screen to fill the window

Close the zoom screen (you will be asked to save)

The screenshot shows a 'Zoom screen' window with a dark blue header. Below the header is a toolbar with icons for save, expand, close, lock, and edit. The main content area is divided into three sections:

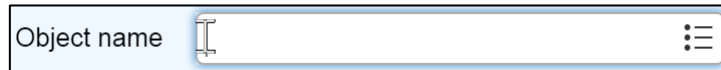
- Authorised form of name**:
  - Name: Brown, Ford Madox
  - Name type: creator
  - Reference number
  - Status: approved preferred term
  - Name note
- Other forms of name**:
  - Use
  - Used for
  - Equivalent
  - Category
- Person's name elements**:
  - Title
  - Gender: male
  - Surname: Brown
  - Forename(s): Ford Madox
  - Prefix(es) to surname
  - Addition(s) to name

The zoom screen is used to show you a record in another database that is linked to the current record. Just like a record in the record details view, you can put a record in a zoom screen into edit mode to make changes to it. The advantage of using zoom screens is that you don't need to leave the database you are in or the record you are working on to see more information about a linked record. For example, if you were viewing a record in the Internal object catalogue for a painting by Ford Madox Brown, you could open the record for Ford Madox Brown in a zoom screen to see his birth and death dates, his history, and other information that belongs on a Persons and institutions record.

## To Link to a Term You Know Exists

As you type into a linked field, Collections will display suggestions that can be used in the field and which match the text you are entering. This can be a quick way to choose a term you know exists or to look for a term you suspect might exist.

Start on a record in edit mode:



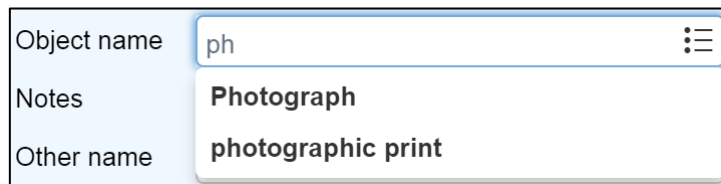
A screenshot of a text input field labeled "Object name". The field is empty and has a cursor at the end. To the right of the field is a menu icon (three horizontal lines).

1. Click in the field you wish to use

A list of terms you can link to will appear

2. Enter the term you wish to link to

As you type, Collections will filter the terms displayed in the drop-down box to just those that match what you have entered



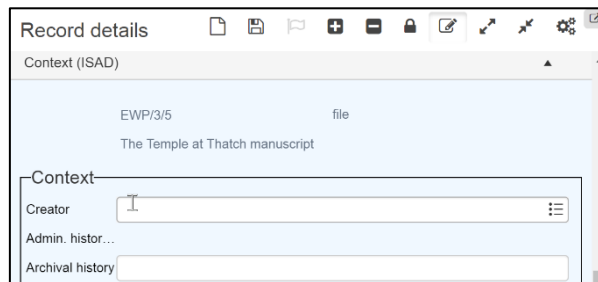
A screenshot of the "Object name" field with the text "ph" entered. A dropdown menu is open, showing two suggestions: "Photograph" and "photographic print". The "Notes" and "Other name" labels are visible on the left side of the dropdown menu.

- i** If your term is very long, it may be easier to select it in the list below the field instead of typing the entire term in. To do this, either click the term in the list or move to it by pressing the down arrow on your keyboard and then press ENTER or TAB.

## To Check if a Term Exists to Link to

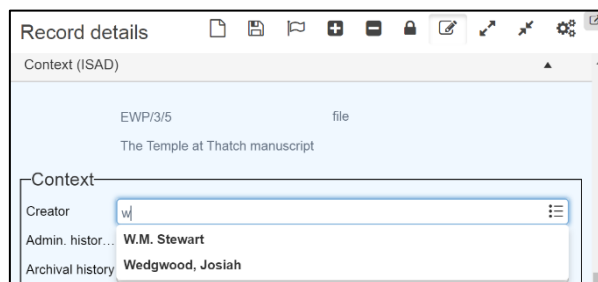
If you are not sure about the exact spelling of a term or the words that are used or even if the term exists at all, the link dialogue box can help you search the linked database more thoroughly. It is important to check if a term already exists before making a new one so that you do not inadvertently create a duplicate.

Start on a record in edit mode:



1. Click in the field you wish to use

A list of terms you can link to will appear



2. Enter the term you wish to link to

As you type, Collections will filter the terms displayed in the drop-down box to just those that match what you have entered

3. If you cannot see the term you wish to link to in the list, click 

The link dialogue box will be opened, searching for the term you entered

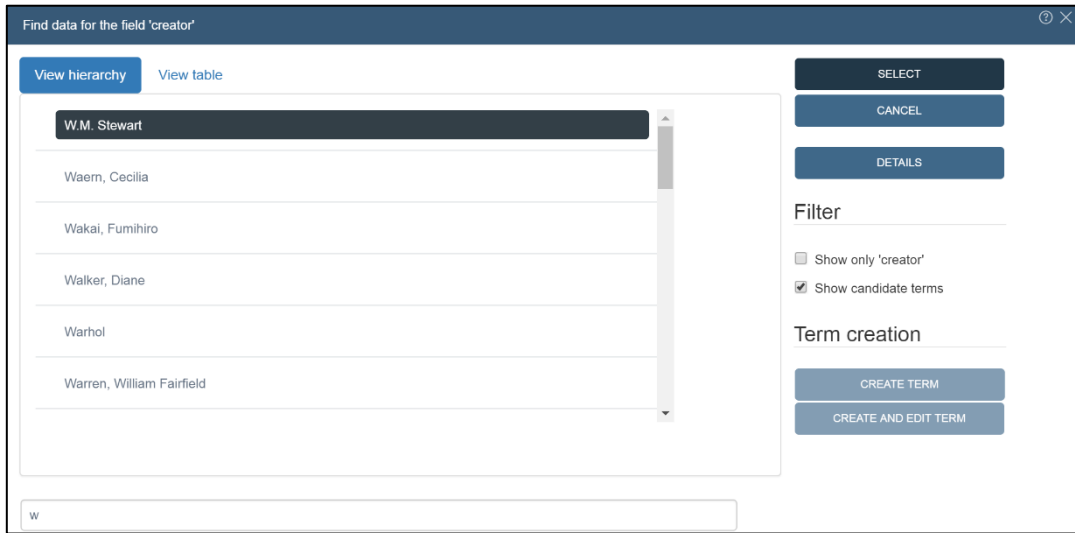


4. If you cannot see the term you wish to link to, untick the  next to 'Show only' All terms in the database will be displayed

**i** With the  ticked, only terms that match the field are displayed, but the term could have been added to the database but not yet used in this field. Looking at all terms ensures you do not unwittingly overlook it.

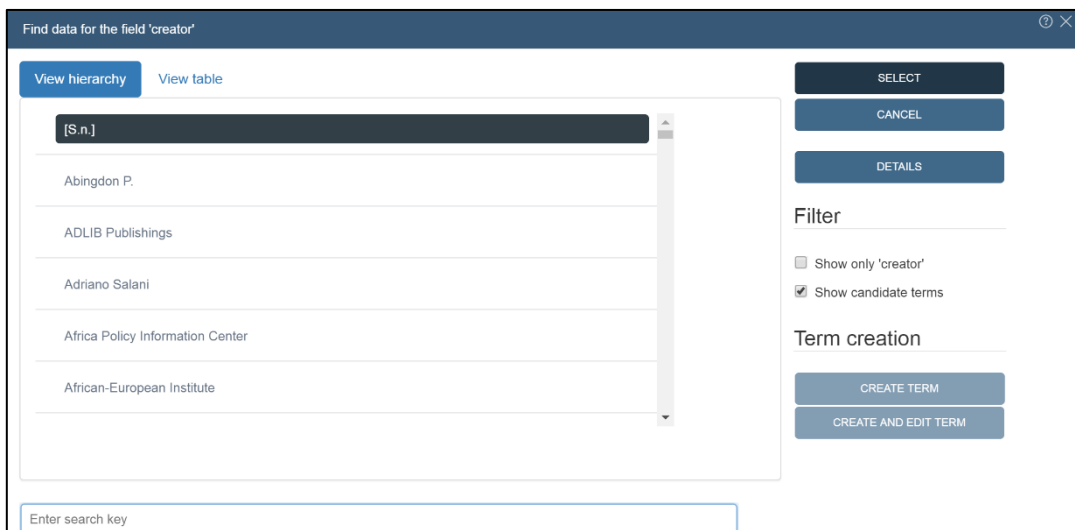
5. If you cannot see the term you wish to link to, tick the  next to 'Show candidate terms'

Terms in the database that have not been fully approved will be displayed



6. If you cannot see the term you wish to link to, delete everything in the field at the bottom left of the link dialogue box

Terms in the list will no longer be filtered to match this field

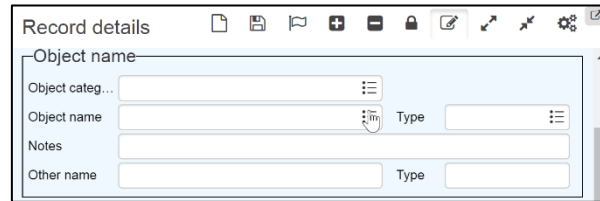


**i** Once you find the term you want to link to, see [To Link to a Term Using the Link Dialogue Box](#) on page 49 for more information about making the link. If you still cannot see the term you wish to link to, you will need to create it. See [To Create a Term to Link to](#) on page 50 for more information.

## To Open the Link Dialogue Box

Most linking can be done without the link dialogue box, but if you know you need to create a term, or if you want more search options, you may find it faster to just move directly into the dialogue box.

Start on a record in edit mode:



Record details


Object name

Object categ... [dropdown]

Object name [input] [icon] Type [dropdown]

Notes [input]

Other name [input] Type [dropdown]

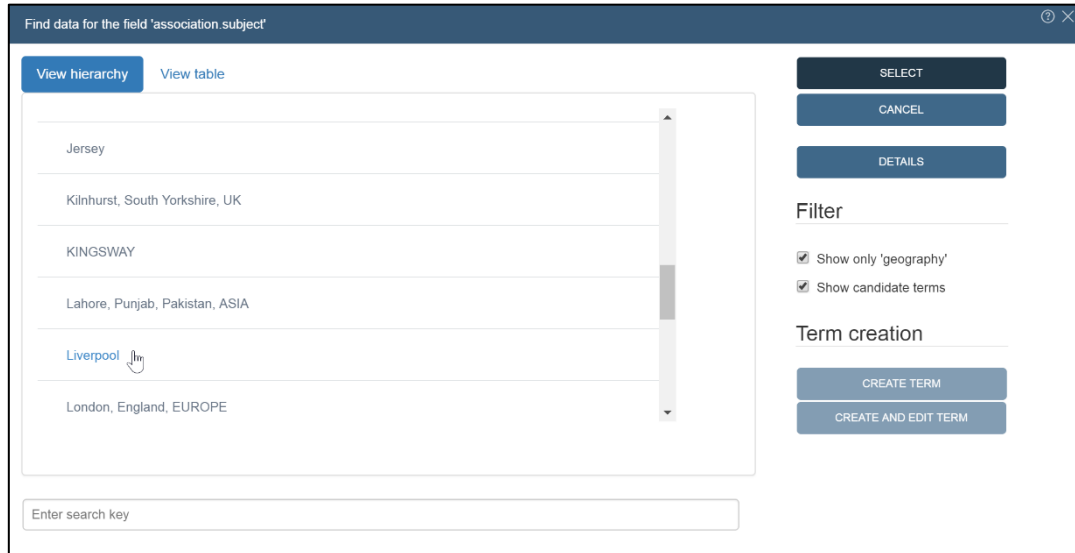
1. Click  at the right of the field you want to open the link dialogue box for  
The link dialogue box will be opened



## To Link to a Term Using the Link Dialogue Box

Once you find a term that you wish to link to (or once you create a term to link to) you will need to complete the process of linking.

Start in the link dialogue box:



1. Click the term you wish to link to in the list

The term will be highlighted

2. Click 


The term will be added to the field and linked to




## To Create a Term to Link to

You may find that the term you need doesn't exist. The link dialogue box allows you to create terms in other databases without having to leave the record you are currently filling out. Before you create a term, ensure it does not already exist (discussed in To Check if a Term Exists to Link to on page 46).

Start in the link dialogue box:

1. Enter the term you wish to create in the field at the bottom left of the link dialogue box
2. Click 

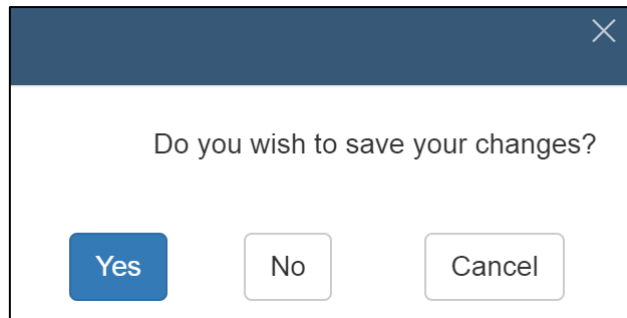
A zoom screen will open showing how the term would appear in its own database and allowing you to edit it

- i** If you do not want to add more information to the term, clicking  instead will close the link dialogue box and take you directly back to the record you had been working on.

3. Enter any extra information you wish to add to the term

4. Click  in the zoom screen

A dialogue box will appear



5. Click 

The record will be created and the term will be added to the list, highlighted

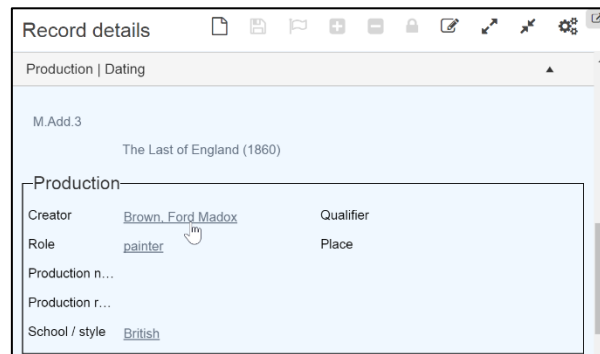
6. Click 

The term will be added to the field and linked to

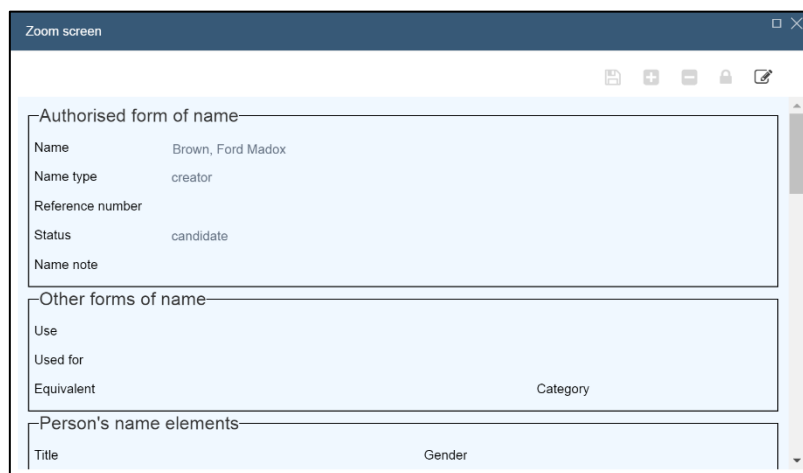
## To View More Information from a Linked Record

You may be working in one database and need more information that is on a linked record in another database (for example, to see a birth and death date of a creator). Collections makes it easy to get that information without having to leave the record you are working on.

Start on a record in view mode:



1. Click the term in the linked field you want to see more information from  
A zoom screen will be opened showing the term's record in the other database



- i** If you need to edit this information, clicking  in the zoom screen will put the record in the zoom screen into edit mode.

## Working with Multiple Records

This section covers work that you can do with more than one record at a time in Collections—in other words, the mass changes that would take a long time when done on a record-by-record individual basis. For that reason, it focusses on the result set view, where this sort of work is best done.

The first part, *Using the Result Set View*, looks at how to change your view of records in the result set view by sorting them or changing what fields you can see. It also discusses marking, which is how you indicate which records you are interested in when working with multiple records.

The second part, *Editing Multiple Records*, looks at how you can use the result set view to make changes to your records. It covers deleting, which can be done to one or more records, and search and replace, a function that allows you to make changes to field contents across all of Collections.



## Using the Result Set View

The result set view allows you to see more than one record at once and choose the details of exactly what you see from those records. For that reason, it is the best view to use when working with multiple records: it allows you to have a 'zoomed-out' view of them.

Most views only show you information about the 'current' record (that is, the record that is visible in the record details view if that view is open).

The result set view allows you to sort, select, export, and view a few fields from as many records as are currently open.

### The Result Set View

The context toolbar. It contains the following commands:

<input checked="" type="checkbox"/>	Mark (select) all records in the list		Delete one or more records
<input checked="" type="checkbox"/>	Invert all records' marked status		Create multiple records at once
	Save a search or list of records		Search for and replace text
	Edit a record in result set view		Export records to your computer
	Save a record in result set view		Change the fields shown here

The screenshot shows a table with columns: object\_number, description\_level, and title. The table contains several rows of records. A context toolbar is visible at the top of the table area. Callouts point to various elements:

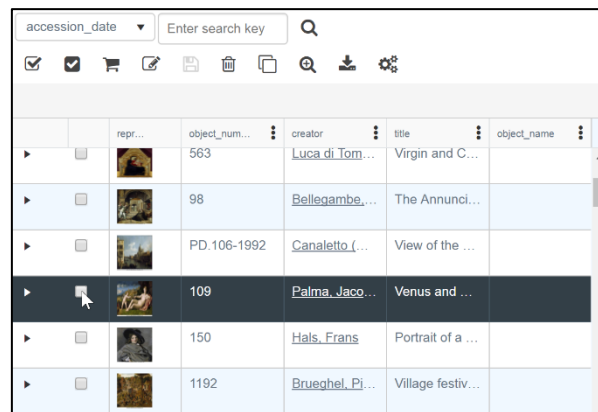
- Filter the records by text in this field:** Points to the search input field.
- The system field name of the field used for this column:** Points to the column header 'object\_number'.
- View a larger image linked to this record:** Points to a small image icon in the first column of a record.
- Mark (select) this record:** Points to a checkbox in the first column of a record.
- A single record—click it to make it the current record:** Points to a record row.
- The number of records in this list:** Points to the '227 ITEMS' indicator at the bottom right of the table.







**i** The field names at the top of each column are behind-the-scenes system field names. See *To Find a Field's System Name or Tag* on page 85 for more information about them.

## To Select ('Mark') Records

Selecting one or more records in Collections is known as 'marking'. Records must be marked before you can do things like changing locations, exporting, searching and replacing, and otherwise performing an action with more than one record. Marking is temporary—as soon as you run a new search or leave the database, marked records will be unmarked.

Start on the result set view:



accession_date	repr...	object_num...	creator	title	object_name
		563	Luca di Tom...	Virgin and C...	
		98	Bellegambe...	The Annunci...	
		PD.106-1992	Canaletto (...)	View of the ...	
		109	Palma Jaco...	Venus and ...	
		150	Hals, Frans	Portrait of a ...	
		1192	Brueghel, Pi...	Village festiv...	

1. Click the  beside every record you wish to mark

A  will appear in the  to indicate the records are marked

2. Click

Every record in the list that was marked will be unmarked, and every record in the list that was unmarked will be marked

**i**  is very useful if you need to mark most (but not all) records: mark the records you don't want marked, then click .

3. Click

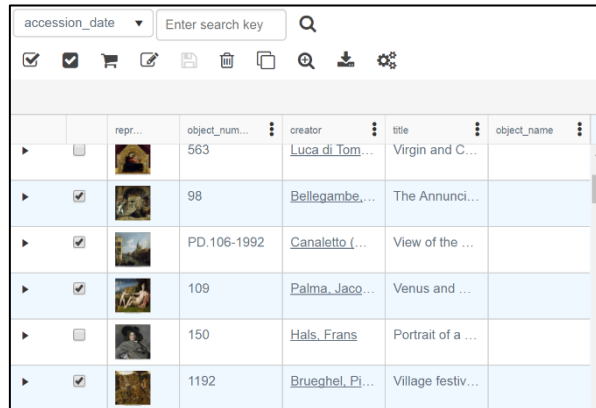
All records in the list will be marked, whether or not they were marked before









## To Deselect ('Unmark') All Records

You may get to a point where you want to start fresh with marking. Remember you can always run a new search or leave the database to clear marks. However, if you want to stay on your current list of records, there is another way to clear all marks.

Start on the result set view:



The screenshot shows a search results interface. At the top, there is a search bar with the text "accession\_date" and "Enter search key" and a search icon. Below the search bar is a toolbar with various icons: a checkmark, a magnifying glass, a trash can, a printer, a download, and a settings gear. The main area is a table with the following columns: "repr...", "object\_num...", "creator", "title", and "object\_name". The table contains six rows of records. The first row has a checkbox that is not checked. The second, third, and fourth rows have checkboxes that are checked. The fifth row has a checkbox that is not checked. The sixth row has a checkbox that is checked.

	repr...	object_num...	creator	title	object_name
<input type="checkbox"/>		563	<a href="#">Luca di Tom...</a>	Virgin and C...	
<input checked="" type="checkbox"/>		98	<a href="#">Bellegambe...</a>	The Annunci...	
<input checked="" type="checkbox"/>		PD.106-1992	<a href="#">Canaletto (...)</a>	View of the ...	
<input checked="" type="checkbox"/>		109	<a href="#">Palma Jaco...</a>	Venus and ...	
<input type="checkbox"/>		150	<a href="#">Hals, Frans</a>	Portrait of a ...	
<input checked="" type="checkbox"/>		1192	<a href="#">Brueghel, Pi...</a>	Village festiv...	

1. Click

All records in the list will be marked

2. Click

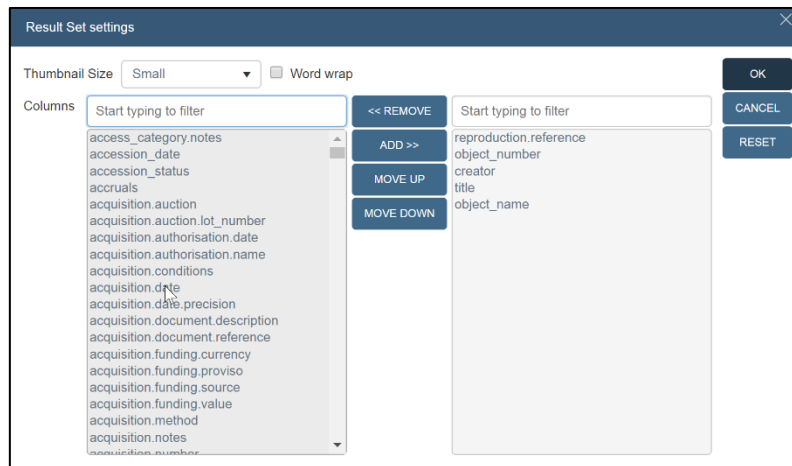
All records in the list will be unmarked

## To Add or Remove Columns in the Result Set View

The result set view by default contains some of the most commonly-used fields. However, your organisation may use different fields, or you may want to see certain information about all records at a glance (for example, the locations they are currently in). In that case, you can change the fields that appear on the result set view.

Start on the result set view:

1. Click 



2. Click a field you want to add on the left column

The field will be highlighted

3. Click 

The field will be added to the right column

- i** If you are adding a field with lots of text (for example, a 'Notes' field), be aware that Collections will only show as much of that text as can fit into the column. If you want to see all the text in that field, tick the  beside 'Word wrap'.

4. Repeat steps 2-3 for every field you want to add to the result set

5. Click a field you want to remove on the right column

The field will be highlighted

6. Click 

7. Repeat steps 5-6 for every field you want to remove from the result set

8. Click 

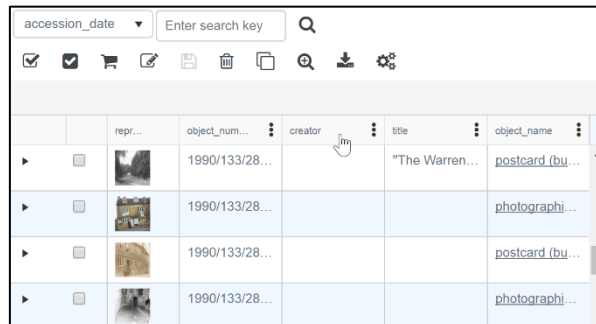
The changes you have made will be applied to the result set until you change it again

- A** It is possible to add more fields to the result set than you can usefully use. The maximum number of visible fields depends on your screen's resolution and how many other views you have open.

## To Sort Records by a Field

Sorting records by a field allows you to quickly browse search results for relevant records. You can sort by any field currently displayed in the result set view.

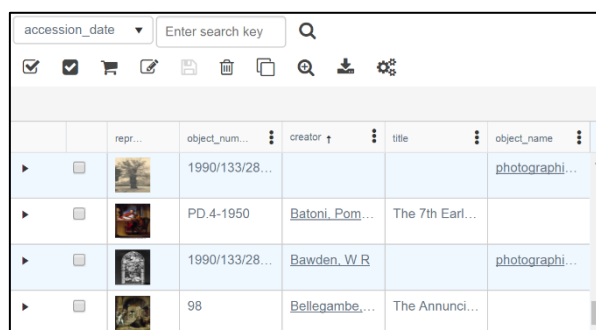
Start on the result set view:



	repr...	object_num...	creator	title	object_name
▶		1990/133/28...		"The Warren...	postcard (bu...
▶		1990/133/28...			photographi...
▶		1990/133/28...			postcard (bu...
▶		1990/133/28...			photographi...

1. Click the column header for the field you want to sort by

The records will be sorted by that field in ascending order (i.e. A-Z). A ↑ will appear beside the field name to indicate that it is sorted in ascending order



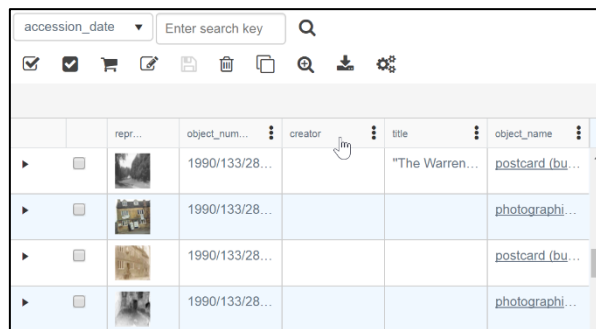
	repr...	object_num...	creator ↑	title	object_name
▶		1990/133/28...			photographi...
▶		PD.4-1950	Batoni, Pom...	The 7th Earl...	
▶		1990/133/28...	Bawden, W R		photographi...
▶		98	Bellegambe...	The Annunci...	

- ⚠ Blank fields come first when you sort in ascending order.
- ℹ If you click the column header again, the records will be sorted in descending order (i.e. Z-A). If you click it a third time, the records will be unsorted.

## To Sort Records by Multiple Fields

You may find that you need to sort by more than one field. For example, you could sort all items created by each creator together (so that every photo taken by Claude Cahun ends up in the same place) and then sort those records by title (so that all of Cahun's photos are in title order). You can sort by any field currently displayed in the result set view.

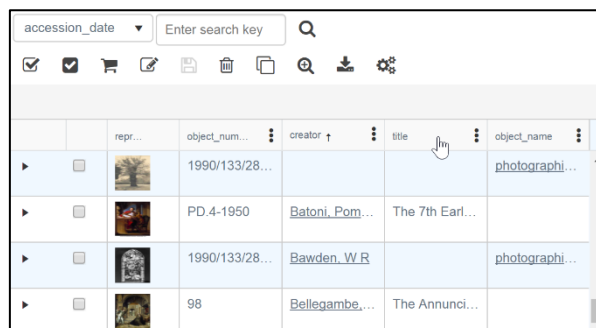
Start on the result set view:



	repr...	object_num...	creator	title	object_name
▶		1990/133/28...		"The Warren...	postcard (bu...
▶		1990/133/28...			photographi...
▶		1990/133/28...			postcard (bu...
▶		1990/133/28...			photographi...

1. Click the column header for the first field you want to sort by

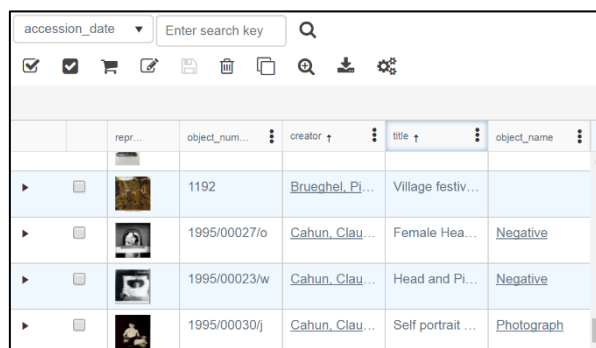
The records will be sorted by that field in ascending order (i.e. A-Z). A ↑ will appear beside the field name to indicate that it is sorted in ascending order



	repr...	object_num...	creator ↑	title	object_name
▶		1990/133/28...			photographi...
▶		PD.4-1950	Batoni, Pom...	The 7th Earl...	
▶		1990/133/28...	Bawden, WR		photographi...
▶		98	Bellegambe,...	The Annunci...	

2. Click the column header for the next field you want to sort by

The records will be sorted by that field in ascending order (i.e. A-Z). A ↑ will appear beside the field name to indicate that it is sorted in ascending order



	repr...	object_num...	creator ↑	title ↑	object_name
▶		1192	Brueghel, Pi...	Village festiv...	
▶		1995/00027/o	Cahun, Clau...	Female Hea...	Negative
▶		1995/00023/w	Cahun, Clau...	Head and Pi...	Negative
▶		1995/00030/j	Cahun, Clau...	Self portrait ...	Photograph

3. Repeat step 2 for each field you want to sort by

## Editing Multiple Records

Often, you may find that you need to make the same change to multiple records. For example, you may want to standardise three different terms that all refer to the same subject, replacing them with a single term. You may wish to correct a common misspelling. You may even have started using a new field, and want to retroactively fill that field on lots of records. Doing these tasks on one record at a time is very time-consuming and has could leave some mistakes or oversights in the data. However, computers are great at doing repetitive tasks like this quickly and accurately. Collections contains many tools to assist with editing multiple records.

One of these tools to edit multiple records is search and replace, which allows you to choose a set of records and replace one string of text in those records with another.

### The Search and Replace Dialogue Box

The screenshot shows the 'Search and replace' dialog box. It features a list of fields on the left, a search input field at the top, and a 'Replace with' field at the bottom. Callout boxes point to various parts of the interface:

- Add the fields you wish to search**: Points to the list of fields on the left.
- Run the Search and Replace**: Points to the 'OK' and 'CANCEL' buttons.
- Search for this text in records**: Points to the search input field.
- Replace text on records with the contents of this field**: Points to the 'Replace with' field.
- Change how the Search and Replace works (covered in more detail below)**: Points to the matching options at the bottom.

At the bottom of the Search and replace dialogue box, you have many options that can be ticked and unticked. The three on the left all relate to how Collections will match the contents of 'Replace' to the actual text on records. Only one of them can be selected.

Match entire field	'Replace' and the field must have exactly the same text in them for the replacement to happen
Match whole word	The word (or phrase) must match exactly what is entered in 'Replace': a search for 'map' will change 'map' but not 'maps'.
Match sub strings	The word (or phrase) must contain what is entered in 'Replace': a search for 'map' will change 'map' and 'maps'.

For example, the following search will have very different results depending on whether 'Match entire field', 'Match whole word', or 'Match sub strings' is ticked:

Replace:	oil
With:	walnut oil

Contents of a field:	oil	oil paint	toilet set
With 'Match entire field':	walnut oil	oil paint	toilet set
With 'Match whole word':	walnut oil	walnut oil paint	toilet set
With 'Match sub strings':	walnut oil	walnut oil paint	twalnut oilet set

The rest of the options allow you to address specific situations with search and replace:

Match case	The word (or phrase) must match exactly what is entered in 'Replace' including capitalisation: if ticked, 'map' will change 'map' but not 'Map'.
Confirm replacement	Collections will show you every single change that is made and ask for your approval.
Add new occurrence	This does not actually replace anything—it adds a new copy of a field to each record, filled with what you have entered.

For example, the following search will have different results depending on whether 'Match case' is ticked or not:

Replace:	oil
With:	petroleum

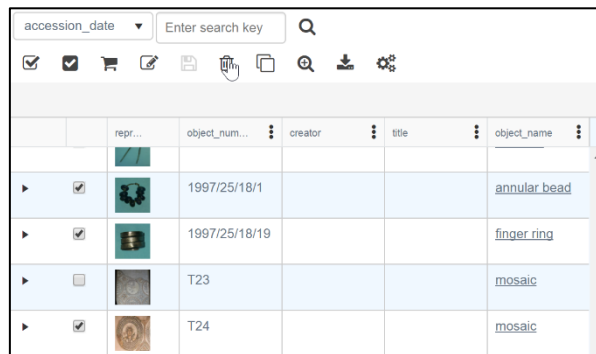
Contents of a field:	oil	Oil
With 'Match case'	petroleum	Oil
Without 'Match case'	petroleum	petroleum

## To Delete One or More Records

It is possible to delete one or more records in Collections if you have the proper user permissions set up.

Start on the result set view:

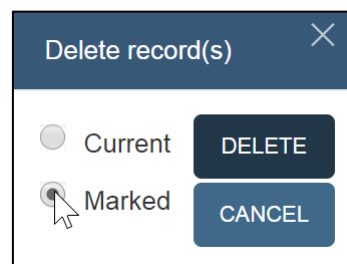
1. Mark every record you wish to delete (see To Select ('Mark') Records on page 56 for more information on this)



	repr...	object_num...	creator	title	object_name
<input checked="" type="checkbox"/>		1997/25/18/1			annular bead
<input checked="" type="checkbox"/>		1997/25/18/19			finger ring
<input type="checkbox"/>		T23			mosaic
<input checked="" type="checkbox"/>		T24			mosaic

2. Click 

The Delete record(s) dialogue box will appear



Delete record(s) ✕

Current DELETE

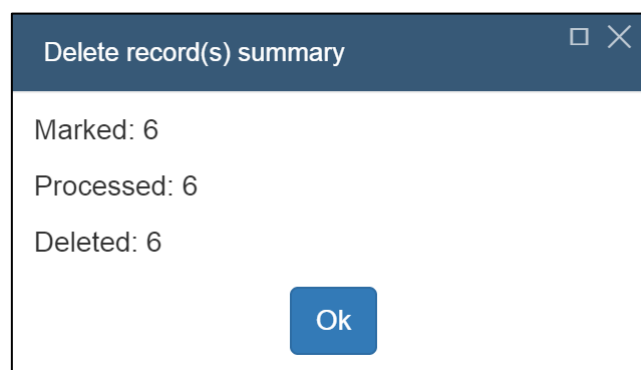
Marked CANCEL

3. Click the  beside 'Marked'

**i** If you only need to delete one record, you do not need to mark it if it is currently highlighted in the in the result set view. Simply click the  beside 'Current' and click DELETE.

4. Click DELETE

The records will be deleted and a summary of deletions will appear



Delete record(s) summary □ ✕

Marked: 6

Processed: 6

Deleted: 6

Ok

**⚠** Be very careful when deleting records. Depending on your setup, it may be possible to recover them, but if so it will not be simple.

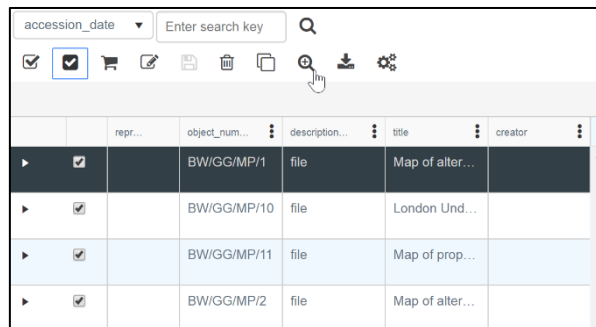
## To Search for and Replace Text on Multiple Records

You may often need to change multiple records (for example, to correct a common misspelling, to standardise the terms used, or otherwise to 'tidy up' a database). The Search and replace allows you to do this very quickly.

- ⚠ *Be very careful when using Search and replace—you are making changes to multiple records, and could very easily encounter unexpected results. It is often best to test a search and replace on a small subset of records first.*

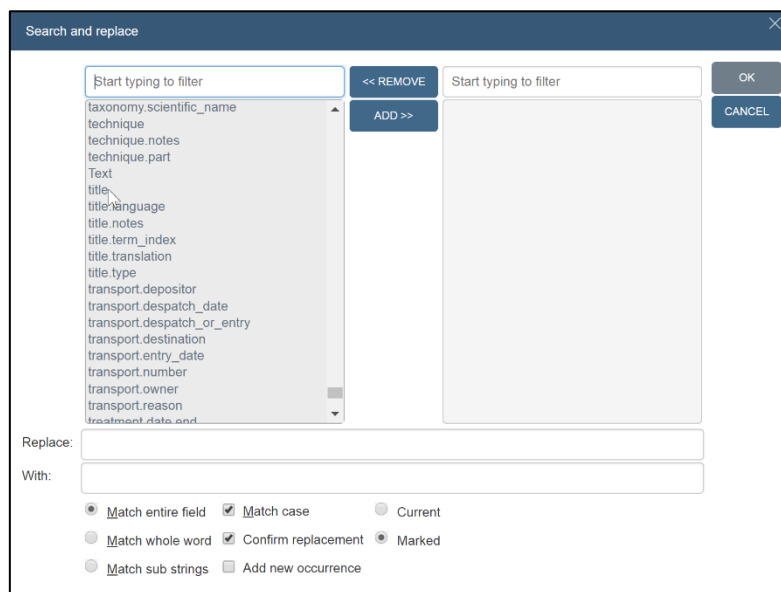
Start on the result set view:

1. Mark every record you wish to replace text on (see To Select ('Mark') Records on page 56 for more information on this)



2. Click 

The Search and replace dialogue box will appear



3. Click a field you want to search and replace in on the left column

- ⓘ *The names on the left are the field's system name. See To Find a Field's System Name or Tag on page 85 for more information about these.*

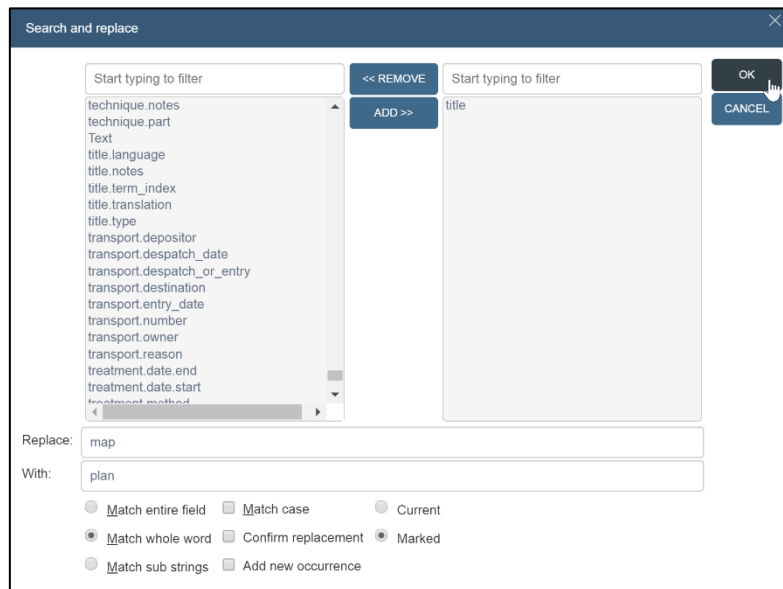
The field will be highlighted

4. Click 



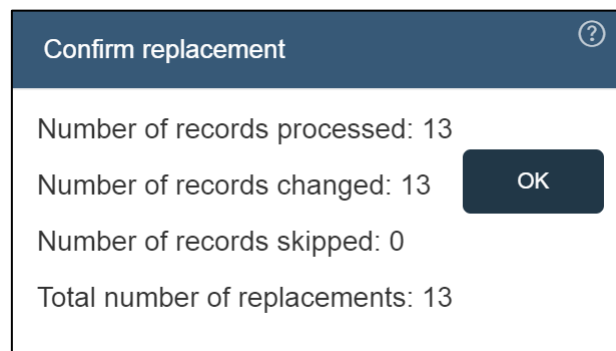
The field will be added to the right column

- Repeat steps 3-4 with every other field you want to run the search and replace in
- Enter the text you want to replace in the 'Replace' field
- Enter the text you want to replace it with in the 'With' field
- Tick the  and s that you will need for the search and replace



- Click

The search and replace will be run. A dialogue box will be displayed at the end giving the number of records changed

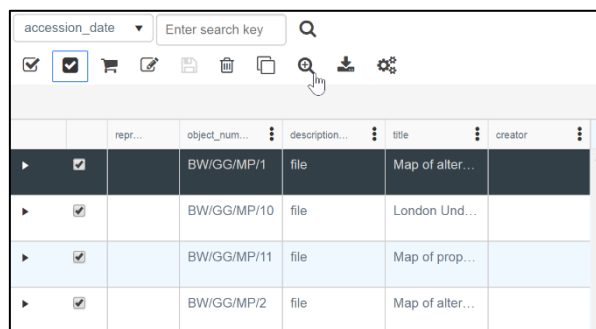


## To Add Another Occurrence of a Field to Multiple Records

Extra occurrences of fields are the best way to handle situations like an object being made from multiple materials. If multiple records all need the same material or subject or other field added to them, but you don't want to overwrite the existing field on the records, you can use the Search and replace's 'Add new occurrence' function to do this.

Start on the result set view:

1. Mark every record you wish to add an occurrence of a field on (see To Select ('Mark') Records on page 56 for more information on this)

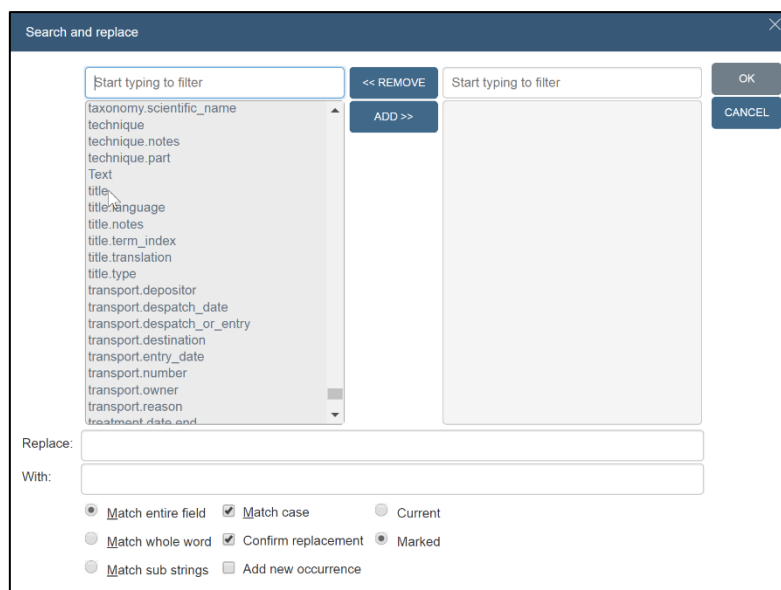


The screenshot shows a table with columns: repr..., object\_num..., description..., title, and creator. There are four rows of data. A search and replace icon (magnifying glass with a plus sign) is highlighted in the toolbar above the table.

repr...	object_num...	description...	title	creator
▶ <input checked="" type="checkbox"/>	BW/GG/MP/1	file	Map of alter...	
▶ <input checked="" type="checkbox"/>	BW/GG/MP/10	file	London Und...	
▶ <input checked="" type="checkbox"/>	BW/GG/MP/11	file	Map of prop...	
▶ <input checked="" type="checkbox"/>	BW/GG/MP/2	file	Map of alter...	

2. Click 

The Search and replace dialogue box will appear



3. Click the field you want to add an occurrence to on the left column

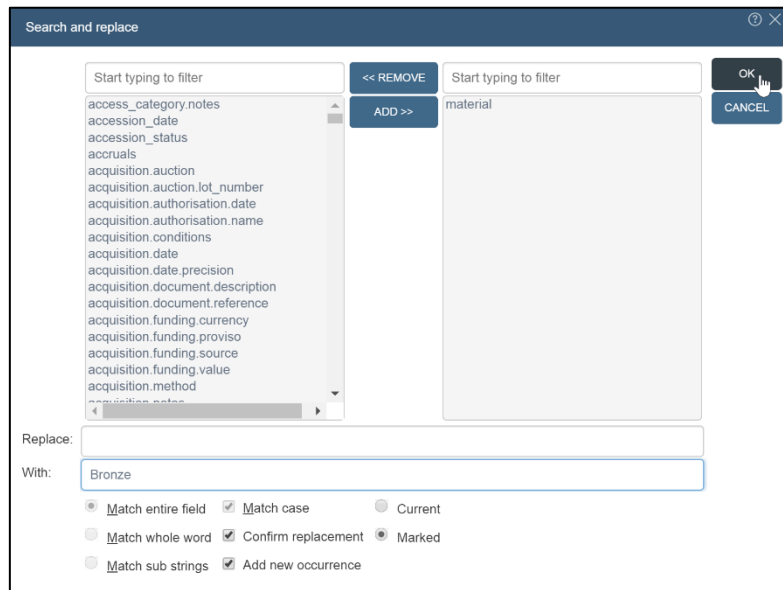
**i** The names on the left are the field's system name. See To Find a Field's System Name or Tag on page 85 for more information about these.

The field will be highlighted

4. Click 

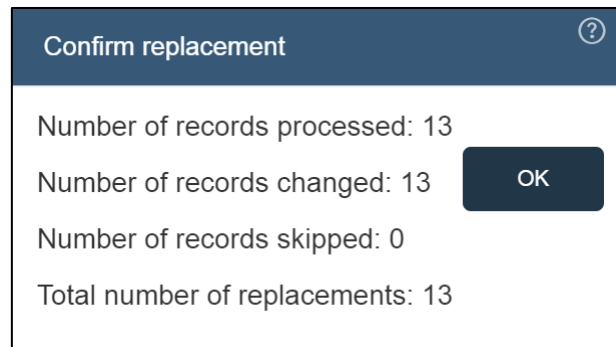
The field will be added to the right column

5. Enter the text you want to be in the field in the 'With' field
6. Tick the  beside 'Add new occurrence'



7. Click

The search and replace will be run. A dialogue box will be displayed at the end giving the number of records changed





## Searching

Recording details of all your objects in Collections would not be much good if you couldn't use the program to find them. For this reason, Collections has a robust search with multiple ways to find records.

You have access to three types of search in Collections:

- Standard Search allows you to search on one or more fields from a limited list. It is easy to use but somewhat restricted.
- Advanced Search allows you to search on any combination of indexed fields in the entire database. It is more powerful but searches must be written in a form Collections can understand (which you will have to learn).
- Saved Searches allow you to run a saved search or open a group of records. Any Collections user can set these up.

There are two ways of beginning a search: either from the top toolbar if you want to run a search in the database you are already in, or from the main menu if you want to run a search in another database.

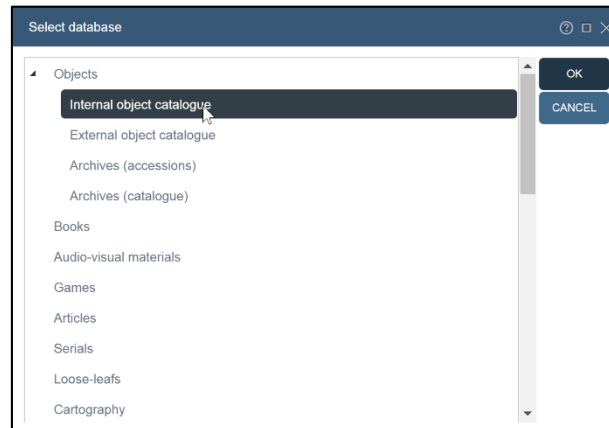
## To Open a Database and Search in it

If you want to search a database that is not already open, you will always need to go to the main menu at the left of the screen.

Start anywhere in Collections:

1. Click  Search on the main menu

A dialogue box will ask you to choose which database you want to search in




2. Click the name of the database you want to search in
3. Click 

A dialogue box will allow you to run a search

## *To Search the Database You Are in*

If you want to run a search on the database you are already in (for example, if you have been editing a person authority record in Persons and institutions and you now want to look for other person records), there is a quicker way to search that skips the step where you must choose a database. Searching within your current database also lets you use **WIDEN**, **NARROW**, and **EXCLUDE** to search within your pre-existing search results.

Start in a database:

1. Click  on the top toolbar

A dialogue box will allow you to run a search

## To Choose Between Standard, Advanced, and Saved Searches

At any time you need to search in Collections, you can choose between any of the types of search.

Start on the search dialogue box:

The screenshot shows a search dialog box titled "Search Internal object catalogue". At the top, there are three tabs: "STANDARD", "ADVANCED" (which is selected and highlighted), and "SAVED SEARCHES". Below the tabs, there is a list of search fields. Each field has a dropdown menu for the operator (all set to "equals") and an input box for the search term. The fields are: Object number, Alternative object number, Institution, Administration name, Collection, Object name, Object category, Object title, Description, Scientific name, Common name, Creator, and Production place. On the right side of the dialog, there are three buttons: "EIND", "CANCEL", and "SETTINGS". Below these buttons is a section titled "Fields" with two radio buttons: "And" (selected) and "Or".

1. Click the tab at the top for the type of search you wish to run  
That type of search will now be open in the search dialogue box



## Standard Search

Standard Search is the basic search in Collections, designed to be easy to use and get you to records quickly.

### The Standard Search Dialogue Box

The screenshot shows a search interface titled "Search Internal object catalogue" with three tabs: "STANDARD", "ADVANCED", and "SAVED SEARCHES". The "STANDARD" tab is active. It features a list of search fields on the left, each with a dropdown menu set to "equals". The fields are: Object number, Alternative object number, Institution, Administration name, Collection, Object name, Object category, Object title, Description, Scientific name, Common name, Creator, and Production place. To the right of these fields are several empty text input boxes, each with a menu icon (three horizontal lines) to its right. On the far right, there is a vertical stack of buttons: "FIND", "WIDEN", "NARROW", "EXCLUDE", "CANCEL", and "SETTINGS". Below these buttons is a "Fields" section with two radio buttons: "And" (selected) and "Or".

Open a list of all terms used in this field in the database

Choose the fields that will appear in Standard Search

Choose how you search the field—for example, do you want to find fields with every single word you enter or just one of them?

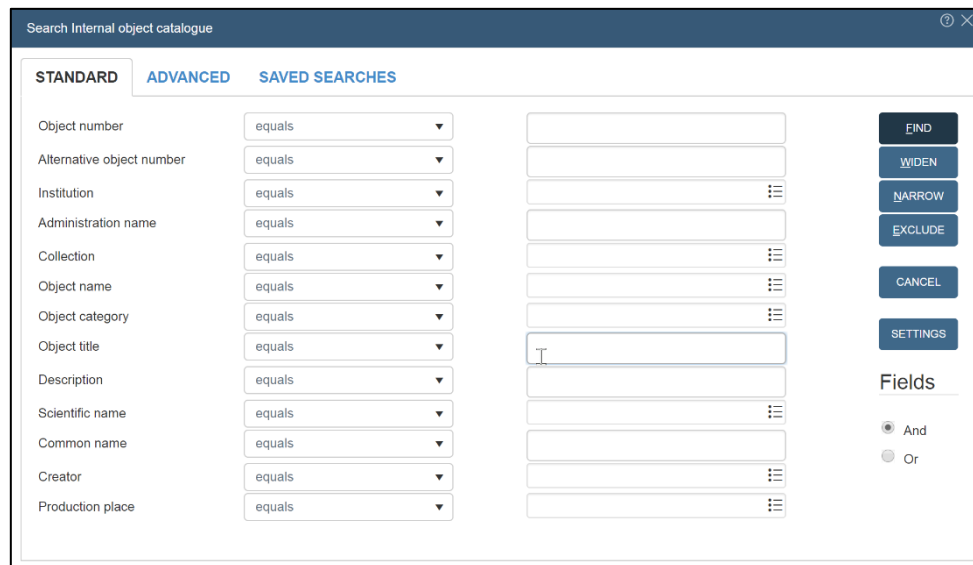
Enter the text that you would like to search this field for

If you have typed into more than one field, this allows you to choose whether you want to match just one of those fields ('Or') or all of them ('And')


## To Search One Field with Standard Search

You can search as many words as you want within a single field on Standard Search.

Start on the Standard Search dialogue box:



1. Click in the field you wish to search
2. Enter the term or terms you wish to search in the field

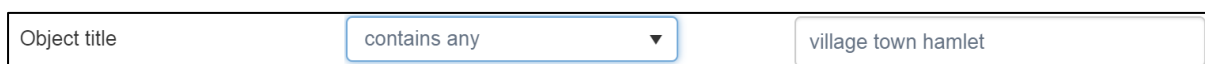


3. Click the drop-down box between the field's name and the terms you are searching

A list of operators will be displayed

4. Click the operator you wish to use to search the field (e.g. 'contains any')

**⚠** If you are using 'equals', your search must be very exact. In a field without ☰ at the far right, you will need to enter a full word or words that you are looking for (e.g. if you enter 'horse', you will find 'horse' and 'horse racing' but not 'horseback'). In a field with ☰ at the far right, you will need to enter the full contents of the field that you are looking for (e.g. if you enter 'Rembrandt', you will find 'Rembrandt' but not 'Rembrandt van Rijn' or 'van Rijn, Rembrandt Harmenszoon').



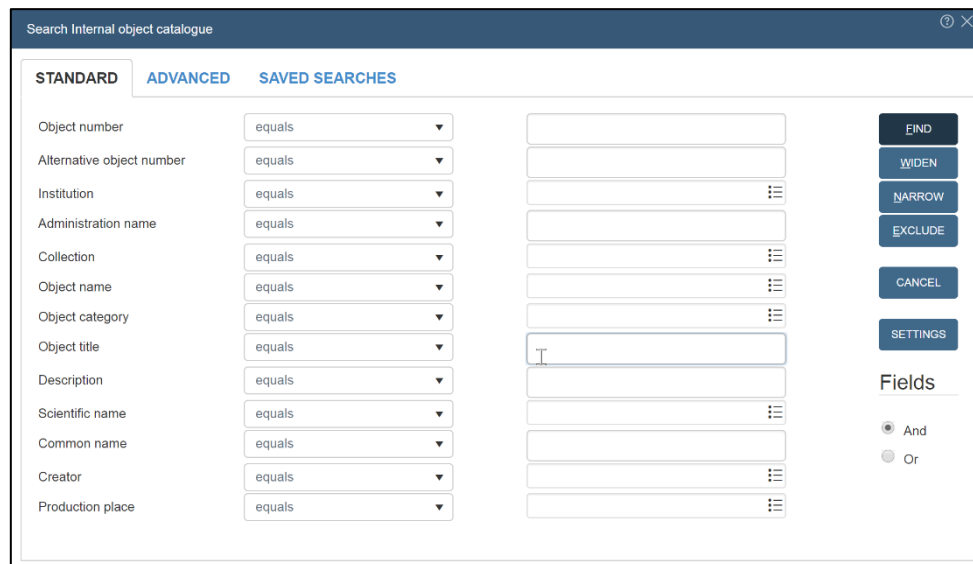
5. Click **EIND**

Results that match your search will be displayed

## To Search Multiple Fields with Standard Search

Many fields are displayed on the Standard Search at once and it is possible to search as many of them as you need. Using the 'And' and 'Or' operators allows you to control how precise the search is. For example, to find records of an object name of 'photograph' with 'woman' in the Title, you would choose 'And', while finding records with 'festival' in the Title or Description, you would choose 'Or'.

Start on the Standard Search dialogue box:



1. Click in the field you wish to search
2. Enter the term or terms you wish to search in the field

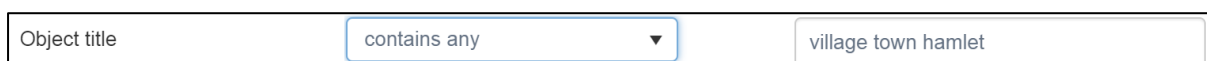


3. Click the drop-down box between the field's name and the terms you are searching

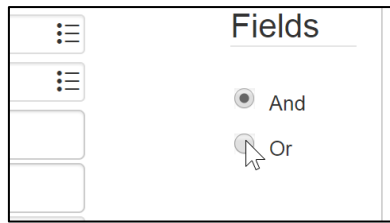
A list of operators will be displayed

4. Click the operator you wish to use to search the field (e.g. 'contains any')

**⚠** If you are using 'equals', your search must be very exact. In a field without ≡ at the far right, you will need to enter a full word or words that you are looking for (e.g. if you enter 'horse', you will find 'horse' and 'horse racing' but not 'horseback'). In a field with ≡ at the far right, you will need to enter the full contents of the field that you are looking for (e.g. if you enter 'Rembrandt', you will find 'Rembrandt' but not 'Rembrandt van Rijn' or 'van Rijn, Rembrandt Harmenszoon').



5. Repeat steps 2-4 for each field you wish to search



6. Click  next to the operator you wish to use to join fields together

**i** 'And' means that the results must match every field you have entered data into, whereas 'Or' means that the results must match at least one of the fields you have entered data into.

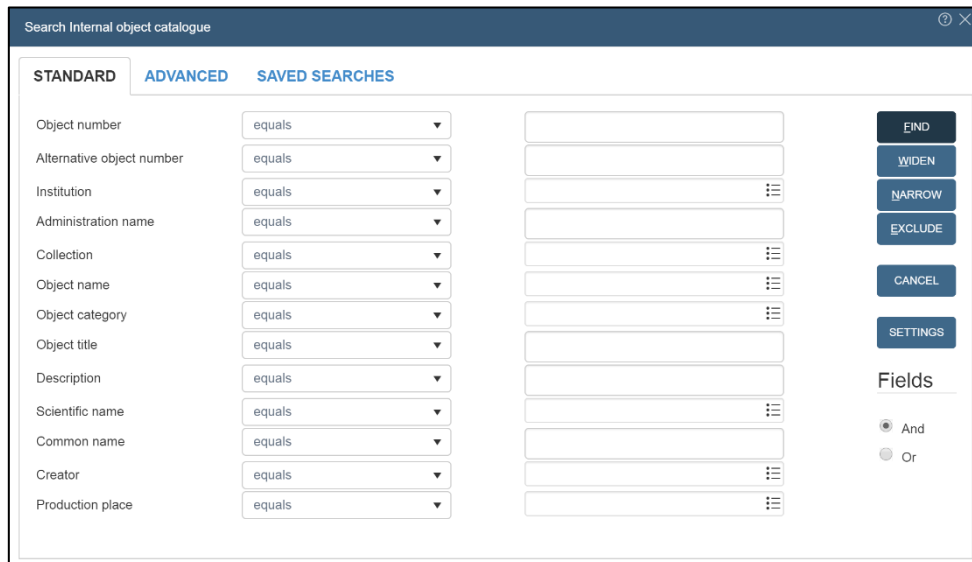
7. Click

Results that match your search will be displayed

## To Open All Records in a Database

You may find it useful to view all records in a database—for example, if you need to browse for a particular item or export all records for inventory purposes. Doing this is very simple.

Start an empty Standard Search dialogue box:



The screenshot shows a window titled "Search Internal object catalogue" with three tabs: "STANDARD", "ADVANCED", and "SAVED SEARCHES". The "STANDARD" tab is active. It features a list of search fields on the left, each with a dropdown menu set to "equals" and an empty text input field on the right. The fields are: Object number, Alternative object number, Institution, Administration name, Collection, Object name, Object category, Object title, Description, Scientific name, Common name, Creator, and Production place. On the right side of the dialog, there are several buttons: "EIND", "WIDEN", "NARROW", "EXCLUDE", "CANCEL", and "SETTINGS". Below these buttons is a "Fields" section with two radio buttons: "And" (selected) and "Or".

1. Click 

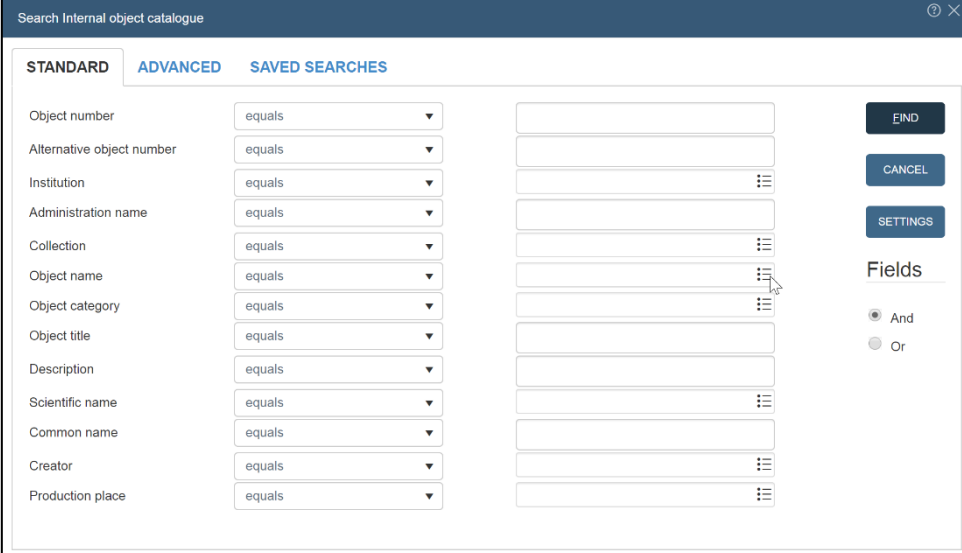
All records in the database will be opened


**⚠** *This can only be done with Standard Search—Advanced Search does not allow an empty search like this.*

## To Choose a Term to Search for from a List

Linked fields allow you to browse a list of all terms used in the field instead of having to type one in. This allows you to see exactly what is used in the database before searching, instead of guessing if a term is present.

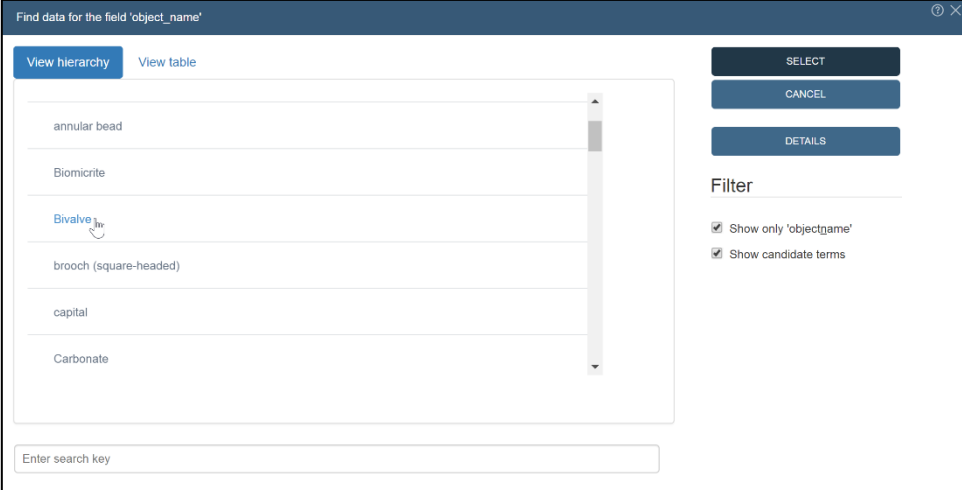
Start on the Standard Search dialogue box:

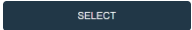



1. Click  in the right of the field you wish to browse

The link dialogue box will appear

- i** For more information about using the link dialogue box, see *Linked Fields* on page 43.



2. Scroll through the list of entries and click one to select it
3. Click 

The term will be added to the Standard Search. You can now continue to add search terms to other fields or click  to run the search

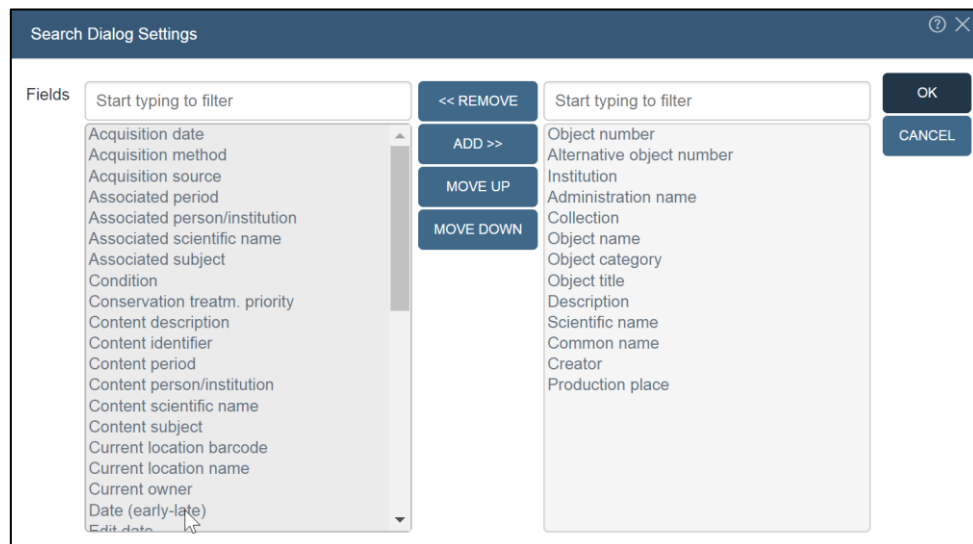
## To Change the Fields on Standard Search

You can customise the Standard Search based on the fields you need to search. These changes will apply to your Collections profile, and you will see them when you log in again.

Start on the Standard Search dialogue box:

1. Click **SETTINGS**

A dialogue box will open



2. Click a field you want to add on the left column

The field will be highlighted

- i** If you do not see the field you need in the left column, you can use Advanced Search (for more information on Advanced Search, see Advanced Search on page 79).

3. Click **ADD >>**

The field will be added to the right column

4. Repeat steps 2-3 for every field you want to add to Standard Search

5. Click a field you want to remove on the right column

The field will be highlighted

6. Click **<< REMOVE**

7. Repeat steps 5-6 for every field you want to remove from Standard Search

8. Click **OK**

The changes you have made will be applied to Standard Search until you change it again

- !** It is possible to add more fields to the Standard Search than can be displayed on your screen. The maximum number of visible fields depends on your resolution.





## Advanced Search

If you need more options, or need to make a more intricate search, than you can find on the Standard Search, Advanced Search can help.

Every Advanced Search is made from the same three pieces. Each of these pieces is separated by a space.

- First, the field that you are searching for data in (for example, 'title').
- Second, the operator which determines how you search that field (for example, 'titles that equal...' or 'input dates that are after...').
- Third, the value that you are searching for (for example, titles that equal 'minutes').

This Advanced Search would be written 'title = minutes'.

### The Advanced Search Dialogue Box

The screenshot shows the 'Advanced' search tab in a 'Search Internal object catalogue' interface. It features three main columns: 'Fields', 'Operator', and 'Boolean operator'. Below these is a 'Search statement' text box and a set of control buttons (FIND, WIDEN, NARROW, EXCLUDE, CANCEL). Callout boxes point to these elements with the following text:

- Choose the fields you wish to search**: Points to the 'Fields' dropdown menu.
- Choose the operators that control how you search a field**: Points to the 'Operator' dropdown menu.
- Choose operators that join searches**: Points to the 'Boolean operator' dropdown menu.
- Enter the search you wish to run, either by typing it in, choosing from the lists above, or both**: Points to the 'Search statement' text box.

### Field Names

To run an Advanced Search, you must use either a field's name or its tag. Both of these are behind-the-scenes ways to uniquely identify each field. When writing field names and tags, capitalisation and punctuation are very important. For more information about locating them, see [To Find a Field's System Name or Tag](#), on page 85.

### Dates

Dates should be written out in ISO form (YYYY-MM-DD). The full date must be enclosed in double quotes. When you are searching, unlike when you are cataloguing, you cannot omit a day or a month (for example, finding records with an input date beginning in 2012 must be written 'input.date >= "2012-01-01"').

## Phrases

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If you are searching for more than one word in a field, you will need to put "" around those words. A search for 'meeting minutes' in the Title field, for example, would be written 'title = "meeting minutes"'.

## Is & Contains

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The list of operators includes two, 'is' (written '=') and 'contains' (written '\_') that allow you to search for fields which include the text you have entered.

- 'Contains' does not use indices, which means it can be much slower. It looks for exactly the characters you have typed in, in exactly the order they were entered, whether or not that means they are inside another word. A search for 'map' would also find 'semaphore', for example.
- 'Is' uses indices, which means it can be much faster. It also means that you must enter the exact word (in word-indexed fields) or phrase (in term-indexed fields) you are looking for, or use an \* at the beginning or end of the word or term. For more information about indexes, see Word & Term Indexes on page 82.

## Word & Term Indexes

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Indexes are lists for the contents of a field Collections creates to make searching faster. You cannot search a field if it does not have an index, and if you avoid indexes (for example, by doing a 'contains' search), it will be slower.

If you are doing an 'is' search (or, in Standard Search, an 'equals' search), you will need to pay attention to indexes and whether the field you are searching in is a word- or a term-indexed field.

- Word-indexed fields are usually free-text fields like Title or Description or Scope & Content. When using an is/equals search, you must search for an exact word you want to be in the field. A search for 'title = map' would find 'Geological Map of Britain' but not 'Maps from a 1792 Atlas'.
- Term-indexed fields are usually fields with ☰ or ▼ to the right, like Creator or Object Name or Location Name. When using an is/equals search, you must search for the full contents of the field. A search for 'creator = Dante' would find 'Dante' but not 'Dante Alighieri' or 'Alighieri, Dante'.

## Wildcards

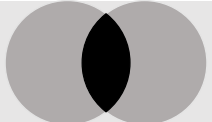


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If you don't know exactly how the word you are searching for is spelled, or if you want to search for multiple words at once, one way to handle this is by using a wildcard character. In Collections, \* is the wildcard. If you want to find words that begin with 'book', for example, you will need to search 'book\*'. This would find book, books, and booklet, but also bookmaker, so not everything the search brings back may be of interest to you.

- ⚠ *Wildcards are only necessary if you are running an 'is' search. A 'contains' search does not need a wildcard and if you used one, it would look for records that actually have an \* entered in them.*

## Joining Searches

Advanced Search allows you to search on as many different fields as you want, for example to find records that have the text 'festival' in either the Title or Description fields.

	<b>And</b> gives you only those records that match both conditions object_name = photo* AND material = "glass plate"
	<b>Or</b> gives you all records that match either condition or both object_name = photo* OR object_name = painting
	<b>Not</b> gives you those records that match the first condition but not the second object_name = photo* AND NOT condition = poor

When joining searches, the most important thing to remember is that you still need to write out each search as if it were a complete search (with a field, an operator, and a value). To find 'festival' in the Title or Description fields, you must start with the two complete searches: 'title = festival' would be one, and 'description = festival' the other. Then, they are joined together with one of the 5 Boolean operators: And, Or, And not, When, When not. The final search would be: 'title = festival OR description = festival'.

- ⚠ *Advanced Searches cannot be abbreviated. The above search must be written as 'title = festival OR description = festival'. It cannot be written as 'title OR description = festival'. Similarly, if you wanted to find Titles with the word 'festival' or the word 'fair' in them, you would have to search 'title = festival OR title = fair'. You could not search 'title = festival OR fair'.*

If you are joining three or more searches together (for example, items created by Mathew Brady with either 'field' or 'plain' in their title), any terms joined together with OR should either be put first or be put in brackets. This search could be run as 'title = plain OR title = field AND creator = "Brady, Mathew"' or it could be run as 'creator = "Brady, Mathew" AND (title = plain OR title = field)'. Collections will search terms in the order that you have entered them unless there are terms in brackets, in which case those will be searched first.

## When & When Not

In addition to the familiar 'And', 'Or', and 'And not' Boolean operators, you can also use 'When' and 'When not'. These work much like 'And' and 'And not', except that they enable you to search on fields that are grouped together.

For example, searching for the string 'current\_location.date = 2017-05-10 AND current\_location.name = "Case 5"' finds every item which moved on May 10 and

which has been located in Case 5 at any point in time (not necessarily on May 10). Searching 'current\_location.date = 2017-05-10 WHEN current\_location.name = "Case 5"' finds every item which moved to just Case 5 on May 10.

## Special Searches

There are several special words you can use in Advanced Search. One of these is 'all'. This is the one type of Advanced Search that does not require a field, operator, and value: just searching for 'all' will open all records in a database.

Another special word is 'today'. In a date field, Collections will always treat 'today' as the current date. You can also indicate a number of days from today: 'today-30', for example, means the date 30 days ago. This sort of search is very useful when it comes to compiling statistics about recent object moves or the number of records created.

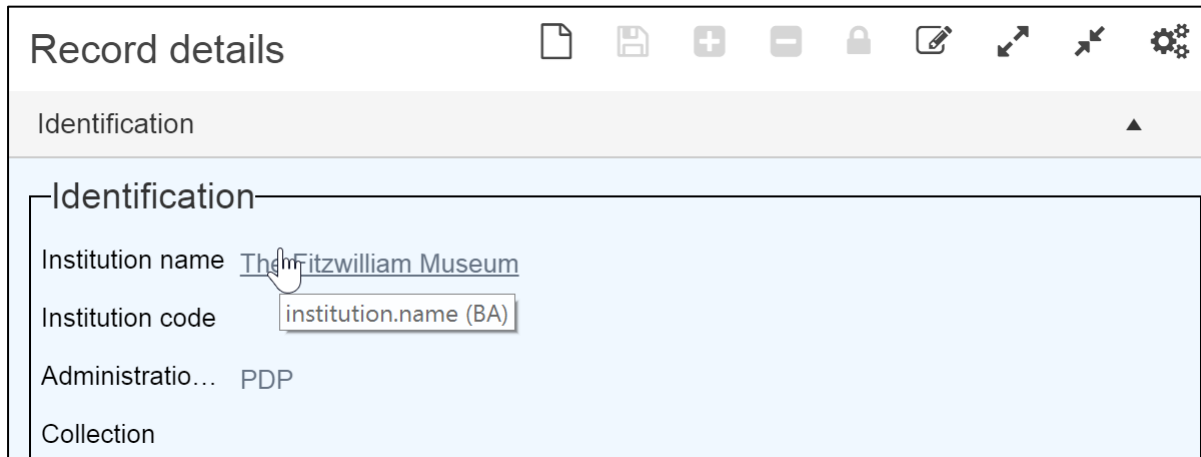
## Sample Advanced Searches

Searching for...	Will find...
title = account	any Title with the word 'account' in it—but not 'accounts' (because title is word-indexed)
title = account*	any Title with a word beginning with 'account' in it, including 'accounts' and 'accountancy'
creator = Dante	any Creator that is exactly 'Dante'—but not 'Alighieri, Dante' (because creator is term-indexed)
creator = *Dante	any Creator whose name ends in 'Dante', including 'Alighieri, Dante' and 'Rossetti, Dante'
creator _ Dante	any creator whose name contains 'Dante', including 'Alighieri, Dante', 'Dante Alighieri', and 'Rhodante, Theodore'
title = "building work"	any record with 'building work' in the Title
production.date.start > "1952-12-31"	all records with a Date (early) beginning in 1953
input.date >= today-30	all records added to the database in the last 30 days
creator = *	all records with data in the Creator field
object_name = photo* AND material = "glass plate"	All glass-plate photos (and photographs)
title = festival OR description = festival	all records with 'festival' in the Title or Description fields
object_name = photo* AND NOT condition = poor	All photos (and photographs) not in 'poor' condition
current_location.date = 2017-05-10 WHEN current_location.name = "Case 5"	All items that moved to Case 5 on 5 May 2017
creator = "Brady, Mathew" AND (title = plain OR title = field)	all objects created by Mathew Brady with either 'plain' or 'field' in the Title field
all	all the records in a database
all AND NOT production.date.end = *	all records without data in the Date (late) field

## To Find a Field's System Name or Tag

To search on a field in Advanced Search, you must know either its system name or its tag. These uniquely identify the field.

Start on a record in record details view:

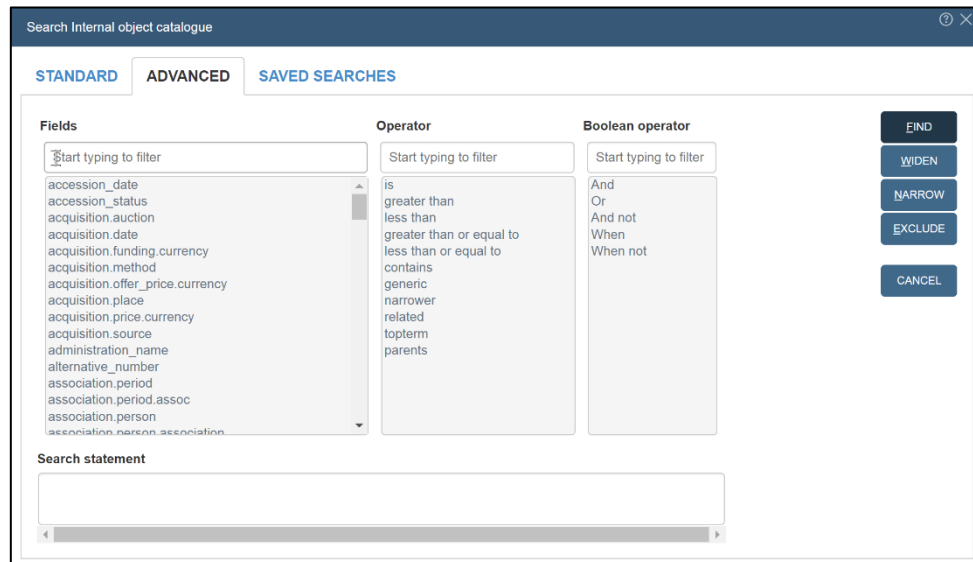


1. Hover your cursor over the contents of the field you wish to know the name of  
The field's system name will be displayed and its tag will be displayed in brackets after the system name

## To Choose a Name or Operator from the List

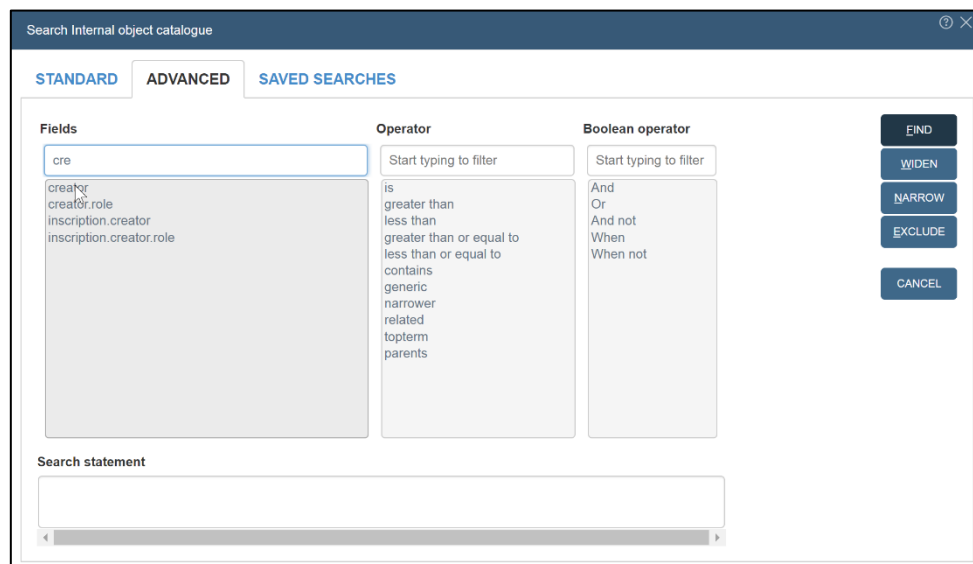
Collections has a lot of fields and operators—if you can't remember the exact name of the one you want to use, you can also choose it from a list. This will fill it into the search statement you are writing.

Start on the Advanced Search dialogue box:



1. If you can't see the field or operator you wish to use in the list, click in the box above that list
2. Enter the name of the field or operator you wish to use

The list will be filtered to those that match what you have typed in



3. Double-click the field or operator you wish to use in the list

It will be added to the 'Search statement' field. You can now continue entering the rest of your search into that field

**i** Not all fields appear in the list. If a field is not indexed, it will not be searchable using Advanced Search and so will not show up in the list.

## To Run an Advanced Search

Once you know how to write an Advanced Search, running one is a simple matter of entering it in the dialogue box. For more information about writing Advanced Searches, see Advanced Search on page 79.

Start on the Advanced Search dialogue box:

1. Enter the search you want to run

**i** Remember, you can either type in a field or operator, or you can find it on the list and double-click it to add it to the 'Search statement' box.

Search Internal object catalogue

STANDARD **ADVANCED** SAVED SEARCHES

**Fields**

Start typing to filter

- owner\_hist.owner
- owner\_hist.place
- owner\_hist.price.currency
- phys\_characteristic.aspect
- phys\_characteristic.keyword
- process
- production.date.end**
- production.date.start
- production.period
- production.place
- record\_access.rights
- record\_access.user
- related\_accession\_number
- related\_object.association
- reproduction.reference
- research.reference\_number

**Operator**

Start typing to filter

- is
- greater than
- less than
- greater than or equal to
- less than or equal to**
- contains
- generic
- narrower
- related
- topterm
- parents

**Boolean operator**

Start typing to filter

- And**
- Or
- And not
- When
- When not

**Search statement**

production.date.start >= "1939-01-01" AND production.date.end <= "1945-12-31"

FIND WIDEN NARROW EXCLUDE CANCEL

2. Click **FIND**

The search will be run





## Saved Searches

Saved searches allow you to choose one or more records and then easily re-open them all at once later. For example, if you are searching for something and happen to notice that many records in your list of results are all lacking a location, you may put them in a saved search called 'Missing Location' so that later you can find them and fix them.

There are two kinds of 'saved search' in Collections:

- True saved searches. For these, you run a search and save your search criteria (that is, what you looked for and the fields you searched for it). Opening it up will open those records, or you can re-run the search and Collections will check to see if any more or fewer records match the search and then bring back the new number of records.
- Saved lists of records. For these, you mark all the records you want to save. Opening it up will open exactly those records. Because there are no search criteria associated with saved lists, they cannot be re-run.

### The Saved Search Dialogue Box

The screenshot shows the 'Saved Searches' dialog box in the 'Search Internal object catalogue' interface. The dialog has three tabs: 'STANDARD', 'ADVANCED', and 'SAVED SEARCHES'. The 'SAVED SEARCHES' tab is active, displaying a table with the following data:

No.	Name	Hits	Owner	Modification date	Creation date
1	Portraits	15	AXIELL/b.doty	10/6/2017 2:31:5...	10/6/2017 2:31:5...
2	Photos	34	AXIELL/b.doty	10/6/2017 2:48:5...	10/6/2017 2:48:5...

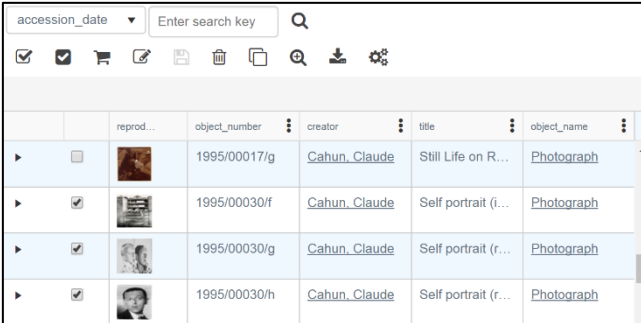
To the right of the table are several buttons: SHOW, WIDEN, NARROW, EXCLUDE, CANCEL, RE-RUN, and REMOVE. Callout boxes provide the following explanations:

- Title of the saved search:** Points to the 'Name' column of the table.
- Number of records the saved search will open:** Points to the 'Hits' column of the table.
- Open the saved search:** Points to the 'SHOW' button.
- Re-run a saved search, which may change the number of records it finds. Only searches can be re-run, not lists of records:** Points to the 'RE-RUN' button.
- Delete the saved search:** Points to the 'REMOVE' button.

## To Save a List of Specific Records

Saving a list of records allows you to choose exactly the records you want to save.

Start on the result set view:

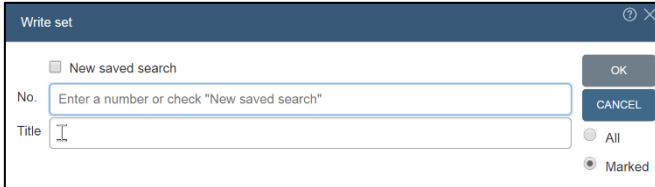


accession_date	reprod...	object_number	creator	title	object_name
		1995/00017/g	Cahun, Claude	Still Life on R...	Photograph
<input checked="" type="checkbox"/>		1995/00030/f	Cahun, Claude	Self portrait (i...	Photograph
<input checked="" type="checkbox"/>		1995/00030/g	Cahun, Claude	Self portrait (r...	Photograph
<input checked="" type="checkbox"/>		1995/00030/h	Cahun, Claude	Self portrait (r...	Photograph

1. Mark every record you wish to save (see To Select ('Mark') Records on page 56 for more information on this)

2. Click 

The write set dialogue box will appear



Write set

New saved search

No.

Title

All

Marked

OK CANCEL

3. Click in the Title field

4. Enter a title for the list of saved records

**⚠** Do not enter anything in the 'No.' field. Collections will assign the list of records a number. By manually numbering it, you risk overwriting another saved search.

5. Click the  beside 'Marked'



Write set

New saved search

No.

Title

All

Marked

OK CANCEL

6. Click 

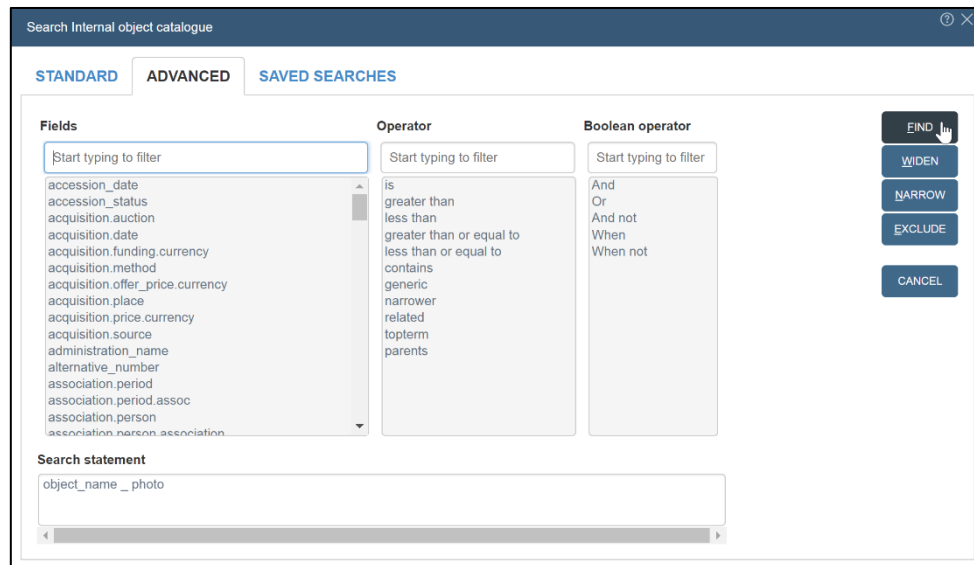
The list of records will be saved

## To Save a Search

Saved searches allow you to re-run the search at later dates: any records that now match the search will be added, and any records that no longer match it will be removed. They are very useful for searches that you need to run frequently—for example, to see all records that were created in the past month ('input.date >= today-30').

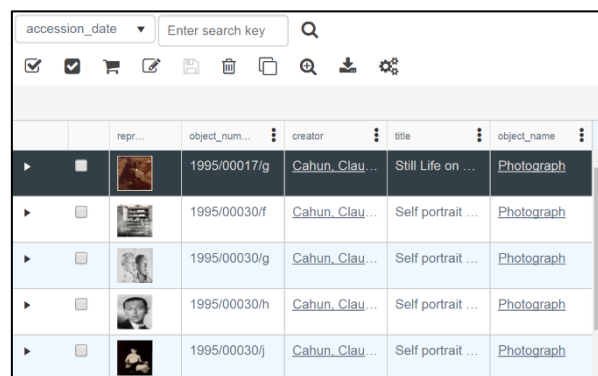
Start on the Standard or Advanced Search:






1. Enter the search terms you wish to save



2. Click 

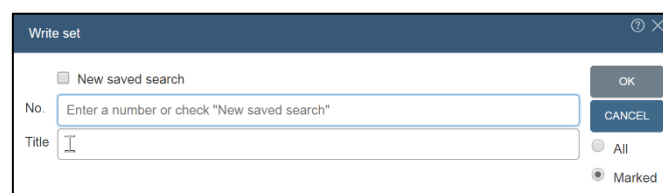
The search will be run



	repr...	object_num...	creator	title	object_name
▶		1995/00017/g	Cahun, Clau...	Still Life on ...	Photograph
▶		1995/00030/f	Cahun, Clau...	Self portrait ...	Photograph
▶		1995/00030/g	Cahun, Clau...	Self portrait ...	Photograph
▶		1995/00030/h	Cahun, Clau...	Self portrait ...	Photograph
▶		1995/00030/j	Cahun, Clau...	Self portrait ...	Photograph

3. Click 

The write set dialogue box will appear

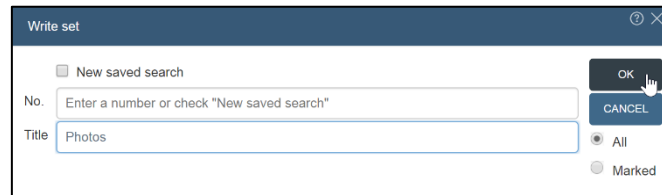


4. Click in the Title field

5. Enter a title for the saved search

**⚠** Do not enter anything in the 'No.' field. Collections will assign the list of records a number. By manually numbering it, you risk overwriting another saved search.

6. Click the  beside 'All'



The screenshot shows a dialog box titled "Write set". At the top right, there are icons for help and close. Below the title bar, there is a checkbox labeled "New saved search". To the right of this checkbox are two buttons: "OK" and "CANCEL". Below the checkbox, there are two input fields. The first is labeled "No." and contains the text "Enter a number or check 'New saved search'". The second is labeled "Title" and contains the text "Photos". To the right of these fields are two radio buttons: "All" (which is selected) and "Marked".

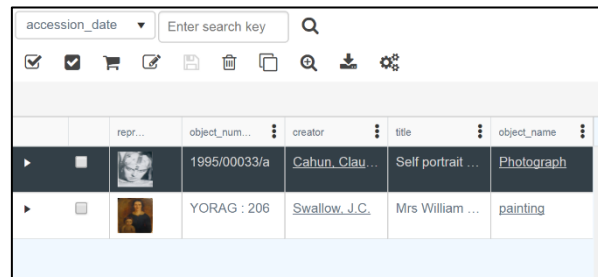
7. Click


The search will be saved

## To Add Records to a Saved List of Records

You may find more records that belong on a saved list. For example, if you are compiling a list of objects that would belong in an exhibit, you will probably not do this all at once. Collections allows you to update a list with more records.

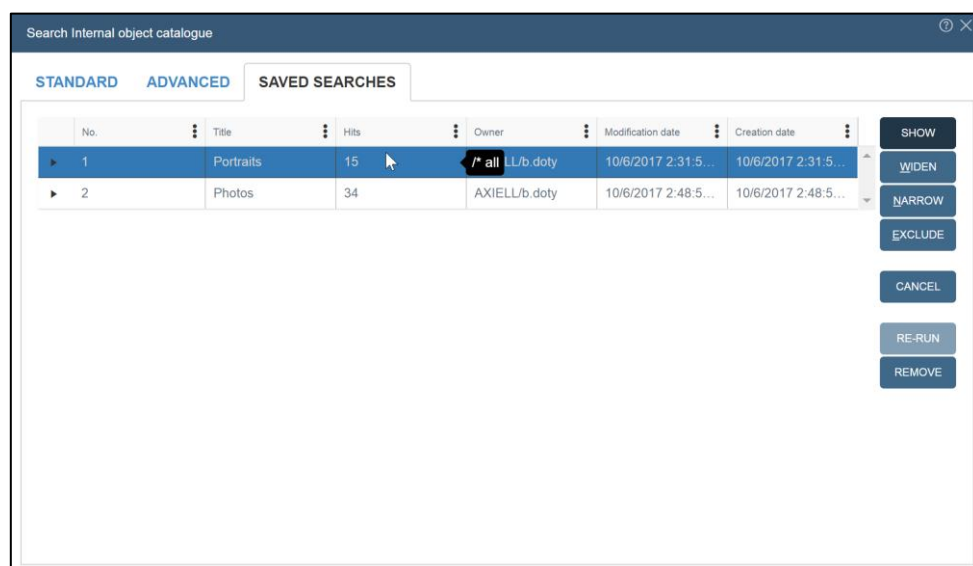
Start on the records you want to add to your saved list in the result set view:



1. Click  on the top toolbar

The search dialogue box will appear

2. Click 'SAVED SEARCHES' at the top of the search dialogue box



3. Click the saved list of records you want to add the records to

It will be highlighted

**⚠** You cannot add marked records to a saved search that saves just search criteria—they must be added to a saved search that saves a specific list of records.

4. Click 

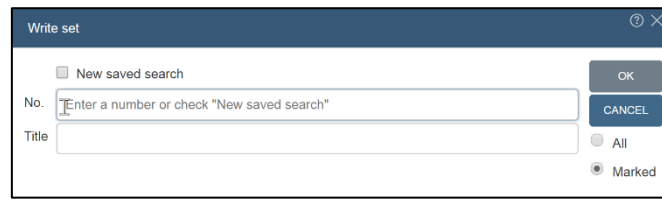
The saved list of records will be added to the saved list of records already in the result set view

5. Click 

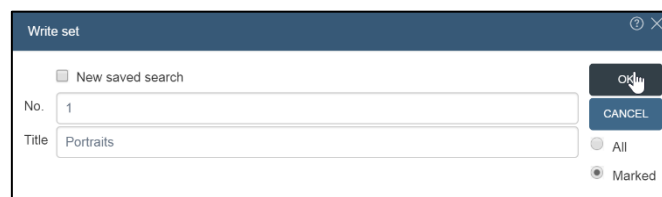
All the records in the result set view will be marked

6. Click 

The write set dialogue box will appear



7. Click in the 'No.' field
8. Enter the number of the saved list of records you want to add records to
9. Click in the 'Title' field
10. Enter the title of the saved list of records you want to add records to
11. Click the  beside 'Marked'



12. Click

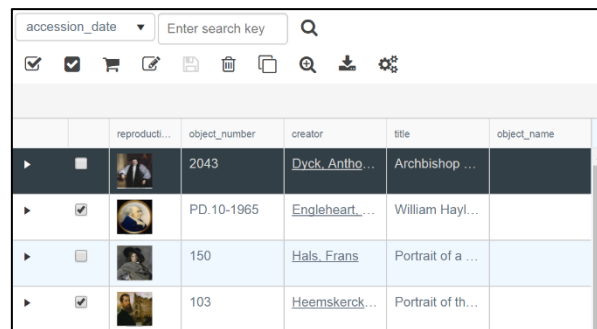
The list of records will be updated

## To Remove Records from a Saved List of Records

You may find that you no longer need some records on a list. For example, if you have a list of records that need cleaning and you only have enough time to fix half of them at once, you will want to remove those fixed records from the list.

Start on the list of records you want to remove records from in the result set view:

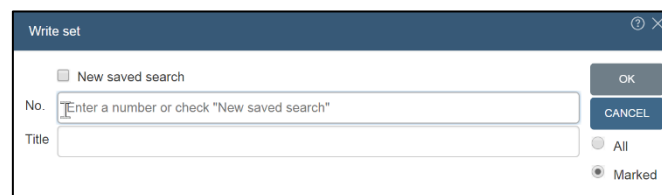
1. Mark only the records you want to remain saved in the list (see To Select ('Mark') Records on page 56 for more information on this)



	reproduct...	object_number	creator	title	object_name
▶		2043	Dyck, Antho...	Archbishop ...	
▶		PD.10-1965	Engleheart...	William Hayl...	
▶		150	Hals, Frans	Portrait of a ...	
▶		103	Heemskerck...	Portrait of th...	

2. Click

The write set dialogue box will appear



Write set

New saved search

No.

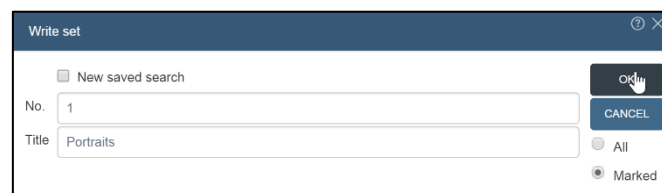
Title

All

Marked

OK CANCEL

1. Click in the 'No.' field
2. Enter the number of the saved list of records you want to remove records from
- ⚠ You cannot remove specific records to a saved search that saves just search criteria—they must be removed from a saved search that saves a specific list of records.
3. Click in the Title field
4. Enter the title of the saved list of records you want to remove records from
5. Click the  beside 'Marked'



Write set

New saved search

No.

Title

All

Marked

OK CANCEL

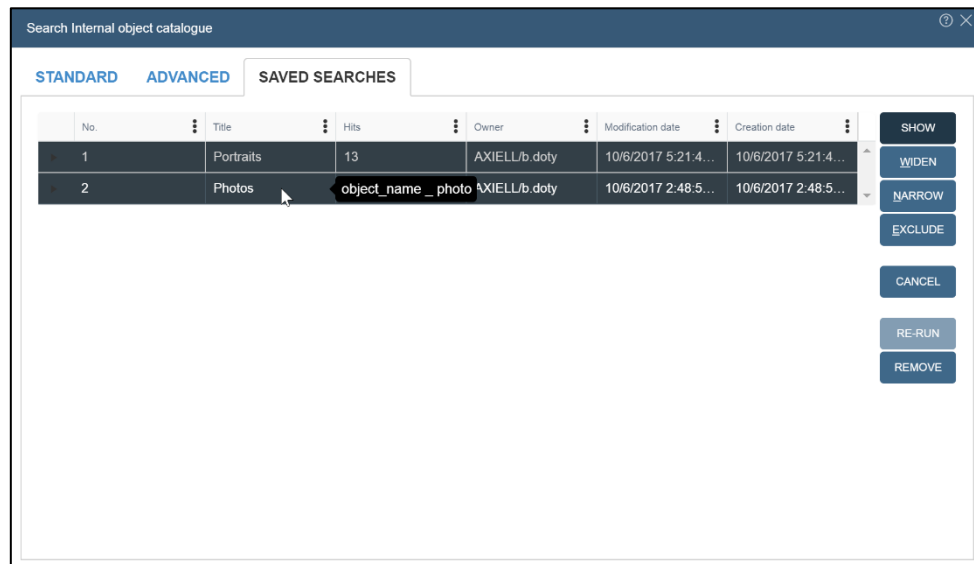
6. Click


The list of records will be updated

## To Open a Saved Search or List of Records

Once you have some saved searches or lists of records, you can open them any time you could run a search.

Start on the Saved Searches dialogue box (to open the Saved Searches dialogue box, see To Open a Database and Search in it on page 70 or To Search the Database You Are in on page 71):



1. Click the saved search or list you wish to open
2. Click 

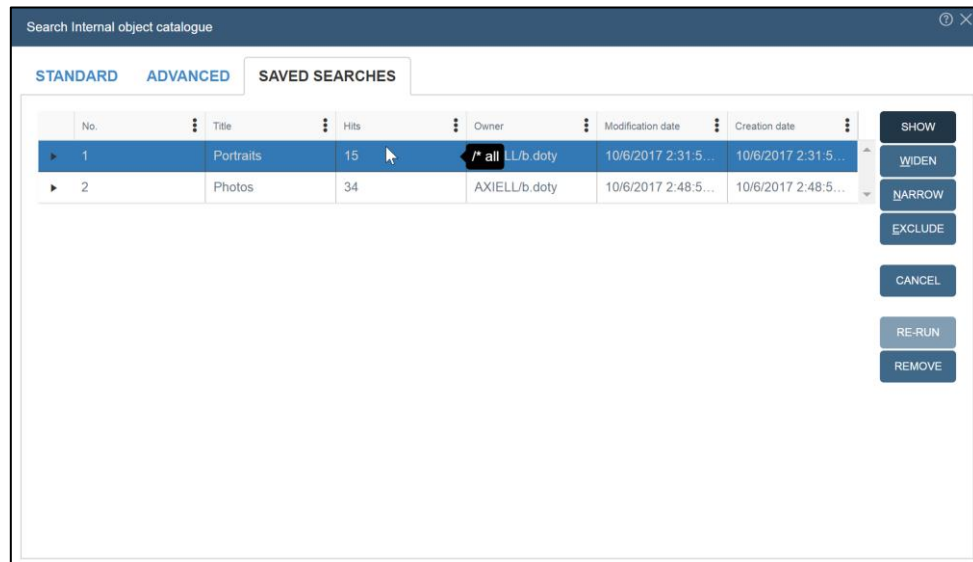
The search or list of records will be opened



## To See If a Saved Search is a List or a Search

It can be important to know if a saved search is a list of records or a set of search criteria that can be re-run. If you haven't indicated this in the title of the search, you can still find it out.

Start on Saved Searches:



1. Hover your cursor over the saved search you want to know more about

A black box will appear showing the original search terms of the saved search

- i** If the text in the black box begins with /\*, it is a saved list of specific records. If the text in the black box does not begin with /\*, it is a saved search (and you will also see that **RE-RUN** can be clicked).