Quick Start Guide: TMS Collections

TMS Collections is a web-based collections management system. This introduction helps new users to open records, move between Display Modes, and navigate through a record set. It also provides brief guidance that will help you explore additional details of the application on your own.

Modules

TMS Collections includes seven modules, or record types, that track specific aspects of your collection, organization, or activities. Each module is associated with an icon, which often appears next to the module name.

- Objects **Object-module records** track works of art, artifacts, specimens, archival materials, and other physical or conceptual objects, including records for your permanent collection, incoming loan objects, and temporary receipt objects. In some databases, there may also be records for electrical equipment, display cases, or other non-collection items associated with object display or care.
- Bibliography **Bibliography-module records** track books, articles (journal, newspaper, etc.), and other reference materials.
- Constituents **Constituent-module records** track individual people, cultural groups and institutions (e.g., organizations, foundations, corporations, government agencies).
- Media **Media-module records** track digital files, web links, and physical media (e.g., slides, negatives, color transparencies, b/w prints).
- Sites **Site-module records** track buildings or sites.
- Exhibitions **Exhibition-module records** track exhibitions and educational displays, from planning to close. Both permanent collection and loan objects included in the exhibition can be documented, as well as objects included in or excluded from specific venues.
- Loans **Loan-module records** track the borrowing and lending of objects.

The modules available to you may be filtered, depending on your security rights.

Logging-In

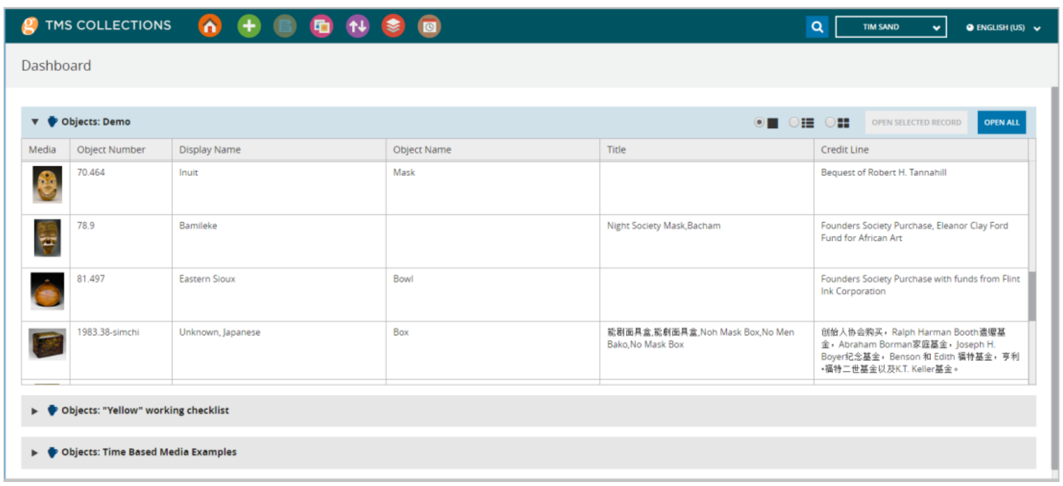
1. Open TMS Collections in the Chrome or Safari browser with the url provided by your administrator.
2. If a login page opens, type in your Login Name and Password, then click *Login*. If there is no login page, your network credentials have allowed you to access the application.
3. The Home page contains your Dashboard. You can always return here by clicking the House icon in the top Product Banner.

   As you "move in" to the application, you will create queries to quickly access the records most relevant to you. First time users may have an empty Dashboard or a set of queries configured by their administrator.

Opening a Record Set

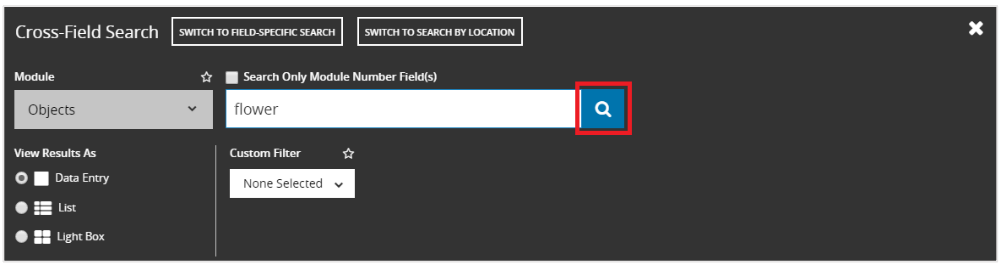
A. By Dashboard Query

If your Dashboard already contains Queries, click *OPEN ALL* or select a record and click *OPEN SELECTED RECORD*. You can open closed Queries by clicking the *caret* to the left of the name.



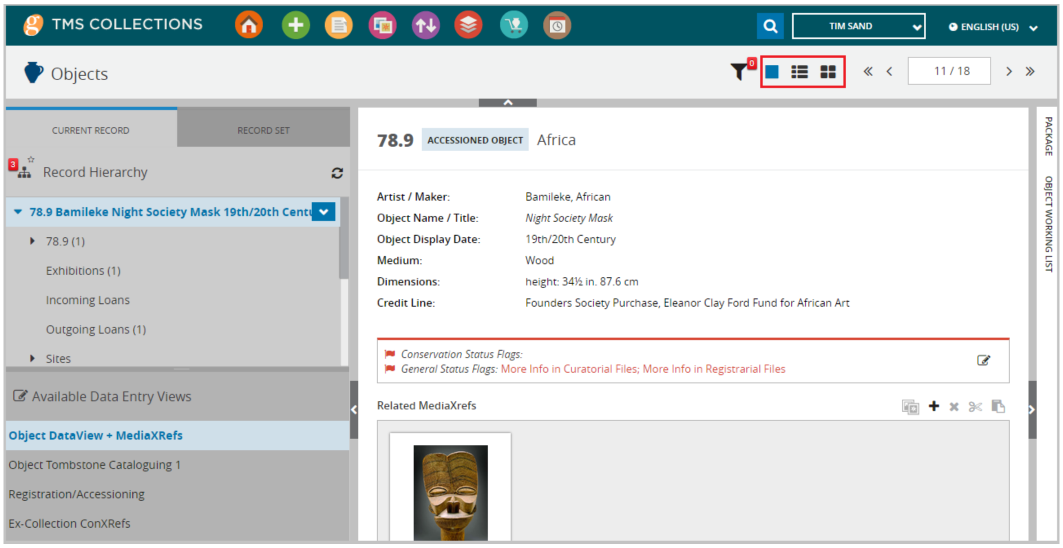
B. By Searching

1. Click the Search icon in the top banner. For this introduction, use the Cross-Field Search, which is open by default. A Cross-Field Search queries multiple fields concurrently, including Object Number, Object Name, Title, etc., so you do not need to know how the data is fielded in the database. Words will be searched with the OR criteria, so the more words or numbers you enter, the more possible results. You can open the Search Panel from anywhere in the application, not just from the Home page.
2. You can change the search module by selecting a value in the drop-down menu under *Module*.
3. Enter a search criteria, for example, a word or an Object Number.
4. Click the Search icon to open a record set.



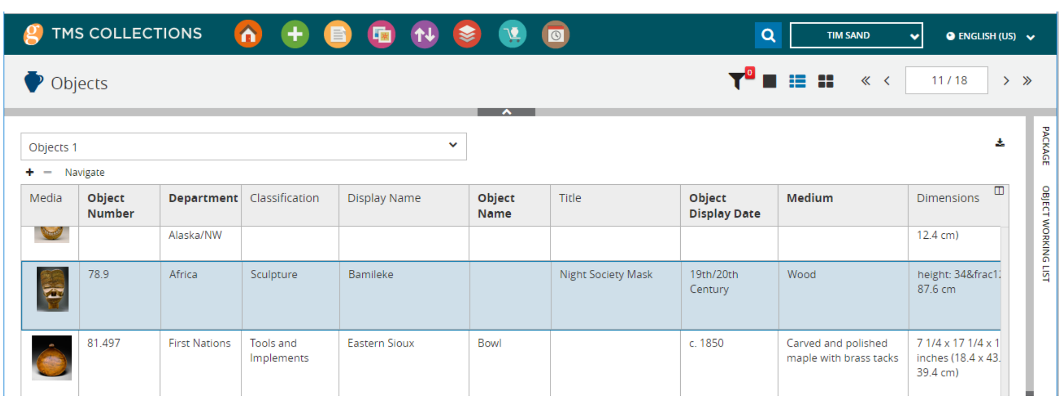
Moving between Display Modes

Once you are in a record set, click on a Display Mode icon at the top right to move to another Display Mode. The icon for the active Display Mode is blue.

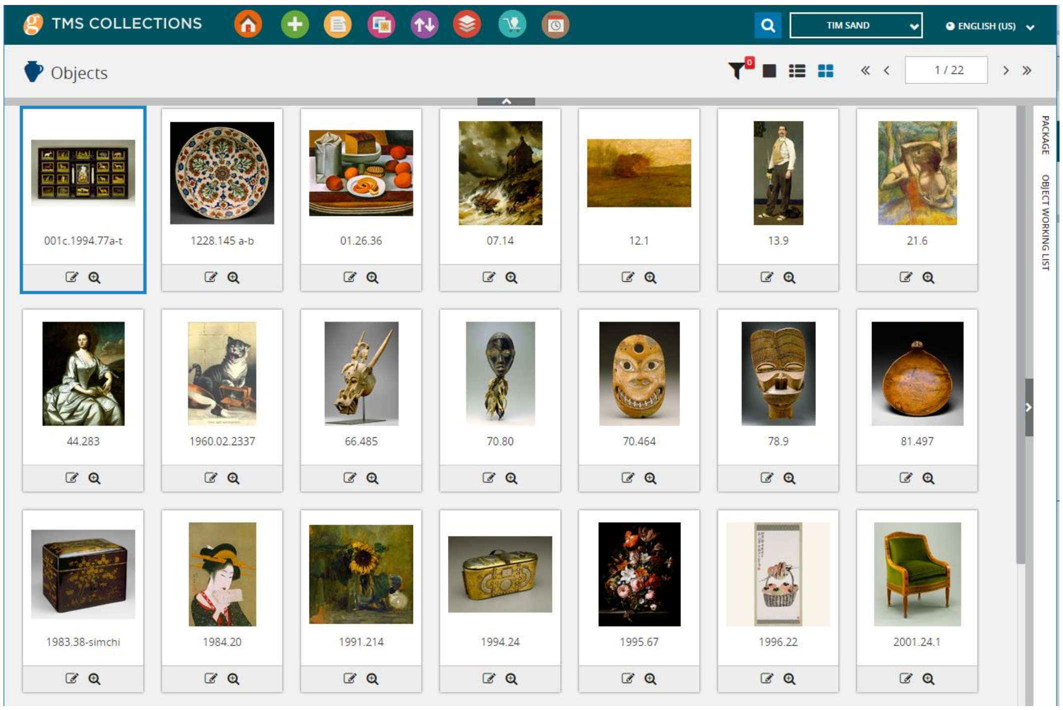


Three Display Modes are available:

- The **Detail (Data Entry) View** provides information about a single record and its relationships. This Display Mode is discussed in detail later in this document.
- The **List View**: includes a row for each record in the record set, in grid format, including a thumbnail image. Options here include:
  - Changing the grid by selecting a different List View in the drop-down at the top left
  - Sorting the grid by clicking a bold-text column heading
  - Changing the size of the thumbnail by clicking the +/- buttons above the thumbnail column.

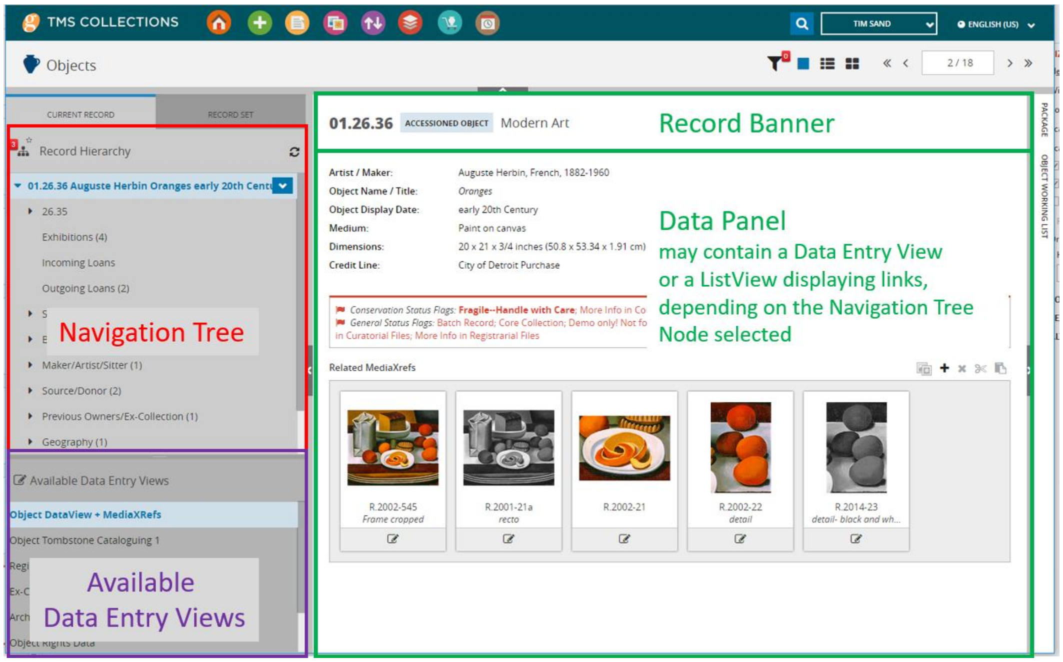


- The **Light Box View** displays thumbnail images with the record number. Options here include:
    - Clicking the Edit icon below an image to open the record in the Data Entry View
    - Clicking the Examine icon to open a pop-up where you can zoom in and out of the image or download the associated media file.



Elements of the Detail (Data Entry) View

Open the Data Entry View by clicking its icon at the top right ■. This Display Mode includes data about a single record and its relationships. It has several inter-connected parts.



THE RIGHT SIDE RECORD AND DATA PANEL

The Record Banner

The Record Banner, located above the Data Panel, provides key information about the record, for identification purposes. It will stay in place as you move through details of the record.

The Data Panel and Available Data Entry Views

The Data Panel consists of a Data Entry View, a page for viewing or editing data related to a single record or link.

There may be multiple Data Entry Views available in each module and context, designed to meet the needs of specific user roles and workflows. They are listed at the bottom of the left-side panel. You can change to a different Data Entry View by clicking on its name. All Data Entry Views are configurable by administrators in a tool called the Composer.

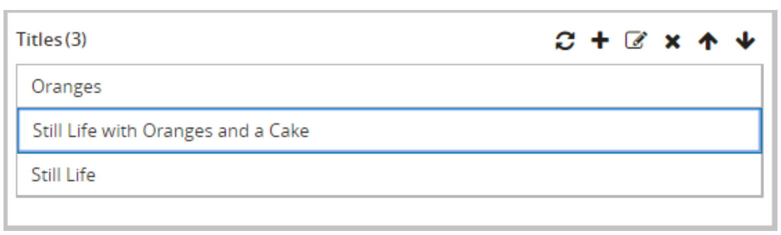
Each Data Entry View is composed of a series of features, called widgets, for viewing or editing data. Because each database may be configured differently, this document discusses only a few general features; the patterns described are repeated throughout the application. Edits are automatically saved, so there is no need to click a Save button as you work. You can use Ctrl S for an immediate, explicit save, for example, if you are editing long text blocks within a single field.

For many fields, such as text and date fields, you can enter your cursor into the field and type, click on a calendar to select a date, or click an arrow to the right of the field to open a drop-down pick list.

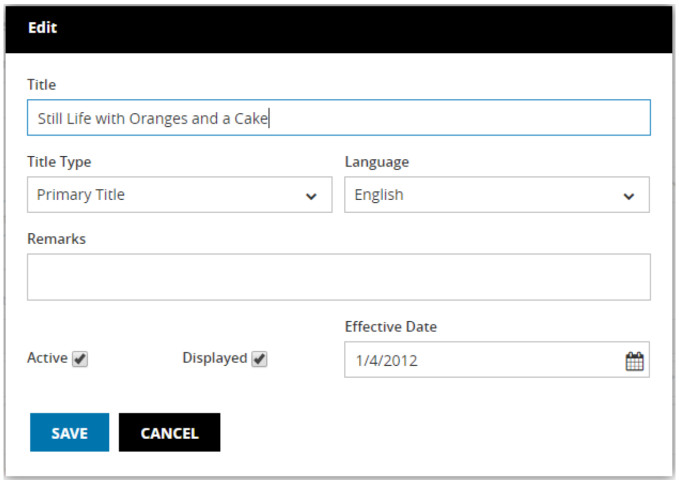
For more complex widgets, where there may be multiple values, the following icons are used:

- + The **Add** icon adds a new value
- The **Edit** icon opens a pop-up screen for editing existing values. You close the pop-up with a button at the lower left, usually CLOSE, or with an X at the top right.
- ✖ The **Delete** icon deletes the selected value
- ↑ ↓ The **Up/Down Arrow** icons moves a value up or down the list
- The **Refresh** icon refreshes the data in the widget. This may be needed in very rare occasions when another user makes a change that affects the order of the rows in the widget.

In the Objects module, the Titles widget is an example of how the icons work in a complex widget. Click the Edit icon to edit the selected Title.



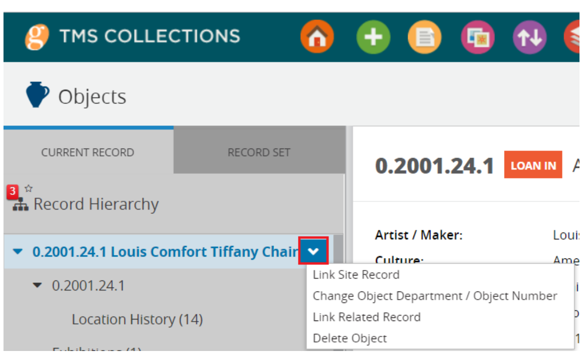
Click SAVE to close the editing pop-up.



THE NAVIGATION TREE (left side panel, *CURRENT RECORD* tab)

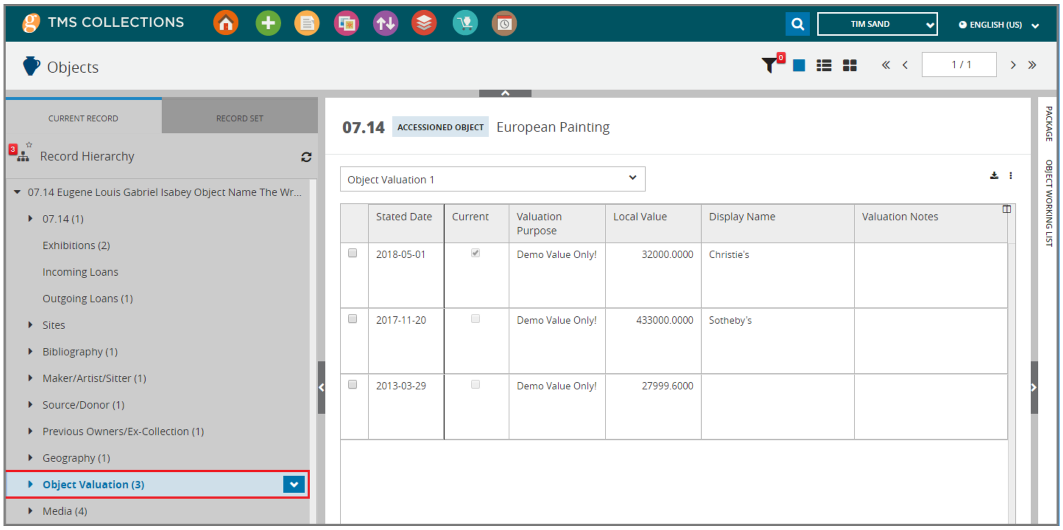
As discussed above, the top level of the tree represents the record. The levels below and their branches represent details of the record where there may be multiple values, such as Object Valuations or links to records in related modules. Each level in the hierarchy is associated with Data Entry Views (if the node represents a single detail or linked record) or with a List View (if the node could include multiple values). To explore features included in the Navigation Tree:

- Click the *caret* to the left of a node to open its sub-branches. The number to the right of the node indicates the number of elements or links (not every node has sub-branches, even if there is a *caret*).
- Click on a node to expose a menu arrow on the right-side of the panel (not every node has an associated menu). Click the arrow to access the menu of available actions.

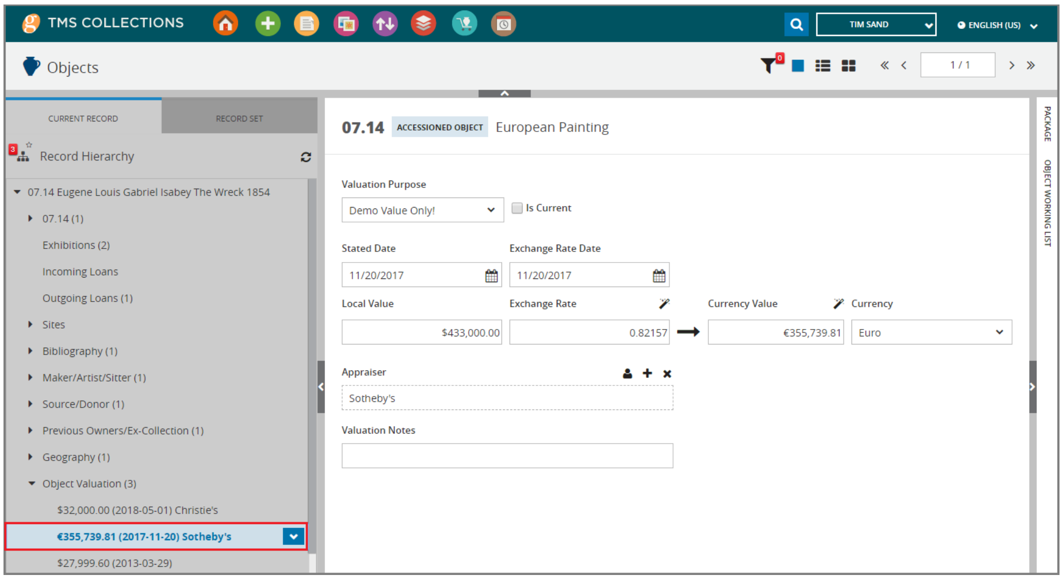


Example of Data with Possible Multiple Values in the Navigation Tree: Object Valuation

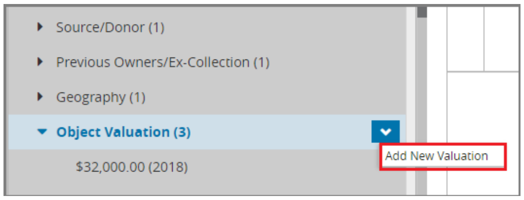
Some nodes provide access to details about the record. In the Objects module, the *Object Valuation* node provides a good example. If there are existing Valuations that you have the right to view, there will be a number to the right of the node name. When you click on the node, a List View of Valuation records will display in the right panel.



To open one of the Valuations, open the branch by clicking the *caret*. In the Navigation Tree, click on the node for a specific Valuation to open a Data Entry View in the right panel.



To add a new Valuation, use the menu to the right of the top Object Valuation node.

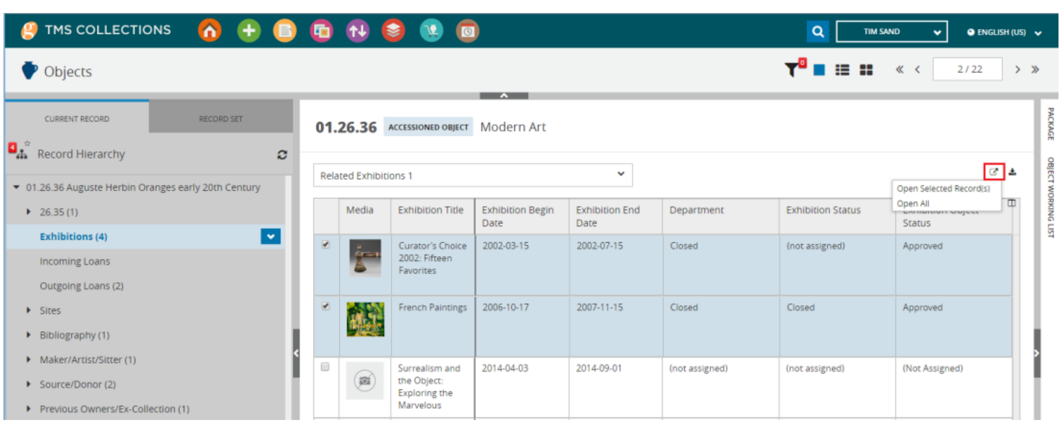


To delete a Valuation, use the menu to the right of the node for a specific Valuation.

Many other data sets, such as Geography in the Objects module and Addresses and Alternate Names in the Constituents module follow the same basic pattern. Depending on the Navigation Tree configuration, for some data, the node may not appear unless there is existing data. In this case, the menu item to add new values will be at the top node for the main record.

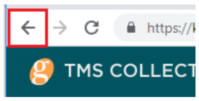
Example of Nodes for Linked Records in Other Modules

The Navigation Tree may also contain nodes with links to other modules. Depending on the configuration of the specific node, you may be able to edit the record itself by opening sub-branches and add or remove links using menus parallel to those described above. In many cases, for simplicity, only a List View is available. Use the Navigation icon at the top right of the list to navigate to all records or to selected records their "native" module. Selecting a menu item, as shown in the screen shot, will take you to the Exhibitions module.



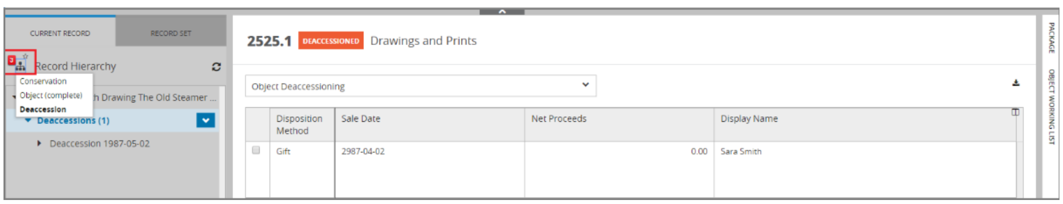
All modules are built from the same basic building blocks. The module you have just navigated to will also have a Navigation Tree at the left and a Data Panel on the right. The data and the links in the Navigation Tree will reflect the focus of the current module.

You can return to the original record and module by using the Chrome browser Back button.



Possibility of Multiple Navigation Trees

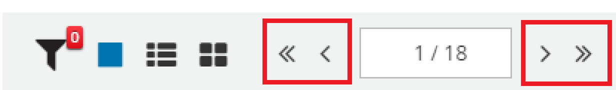
Additionally, some modules may have multiple Navigation Trees. If you see a red number at the left left of the record node, click it to open a menu of alternate Navigation Trees. Change to a different Navigation Tree by selecting its name.



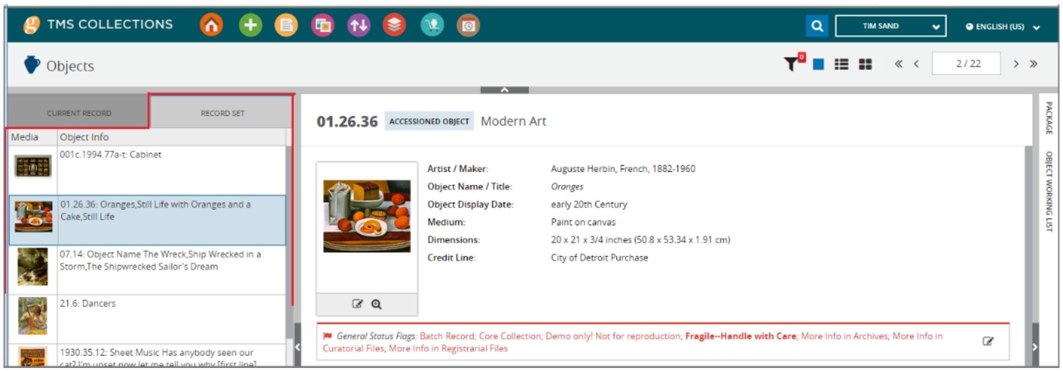
For example, in the Objects module, an alternate Navigation Tree provides access to Deaccessioning or Conservation information (starting in the Version 2018 Winter release).

Moving through the Record Set in the Detail (Data Entry) View

At the top right of each display mode, a navigation feature displays the record count and the position of the selected record within it. Arrows allow you to move forward or backward through the record set, or to navigate to the first of last record in the set.

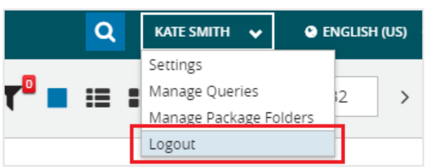


The Record Set tab on the left panel of the Data Entry View is a tool to help you find records quickly based on thumbnail images, without moving back and forth the List or LightBox Display Modes. Select any record to open it in the right panel.



Logging Out

Your Web Application session will expire after a period of inactivity. This is needed for both security reasons and to avoid over-writing newer data entered in other browser sessions with stale data. It is important to logout or close the browser tab when you stop working. To logout, click the down arrow next your username in the top banner and click *Logout*.



Other Features You May Notice as you Explore

Features Accessed through the Top Banner

The Product Banner at the top of each page contains icons and menus that open specific features. Some of these features are available on the Home page, but most require that you are in a record set in a specific module and that you have appropriate security rights.

Click an icon in the top banner to open a feature:

-  The **Home** icon brings you back to the Home page and Dashboard.
-  The **Add Record** icon allows you to add a new record.

- The **Reports** icon allows you to generate reports.
- The **Media Working List** icon opens a panel at the bottom of the page for collecting Media records (by dragging thumbnails into the panel) to compare or download.
- The **File Upload Assistant** icon allows you to upload a modified file, replacing one you previously downloaded.
- The **Batch Update** icon allows you to update fields and widgets in all the records in the record set at once.
- The **Move Assistant** icon (Objects-module only) allows you to enter moves.
- The **Task Report** icon allows you to see the status of tasks that are pending or that you have performed, such as scheduled reports.
- The **Query** icon opens the search panel.
- The menu associated with your **User Name** at the right provides access to Settings (to save Language and Locale preferences), Manage Queries, Manage Package Folders, and Logout.
- Use the **Language Dropdown** at the far right to change the interface language.

Packages

A Package is a tool for making a list of records in a single module, and is accessed from the right margin of the application. For details, see *Using Packages to Manage Lists*. In brief, if the Package panel is empty, you can search for an existing Package by clicking the Query icon, or add a new Package using the Add icon in the top Product Banner. Click the Plus icon **+** to add the current record or record set, or add records by dragging thumbnails into the panel. Click the Navigation icon to replace the current record set with the records in the Package.