



## **TMS Collections Help**

**V1.0**

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# Introduction to TMS Collections

**TMS Collections** is a comprehensive application for managing collections in the cultural heritage industry.

Its predecessor, **TMS for Windows**, was designed by professional museum registrars, curators, conservators, and administrators. TMS Collections continues development with the input of highly experienced museum and art collections management professionals. As a result, it incorporates solutions for the management all of the collection-information tasks carried out by institutions, private collections, and other organizations responsible for managing art and historical collections.

TMS Collections uses eleven different [modules](#) to record and track different facets of cultural heritage information: Objects, Constituents, Media, Exhibitions, Loans, Shipping, Crates, Bibliography, Events, Sites, and Insurance Policies. Records in different modules may be linked together in order to more easily manage workflows and tasks.

Examples of task and workflow management:

- Objects records may be linked to all of the Object's related Constituents such as the artist, funder, or donor.
- Managing the physical location of Objects: recording the physical movement of an Object from one location to another and maintaining a history of Object locations
- Exhibition planning is coordinated by linking Exhibitions to Objects, related Constituents, Media, Loans, Shipments, and Events records.
- Exhibitions layouts can be managed by assigning Objects to their physical location with the Exhibition.
- Media records for images, documents, video, and audio can be linked to related records in all of the other ten modules.

TMS Collections also includes features for managing groups of records:

[Packages](#) which allows users to save groups of records for sharing with colleagues, or publishing to a website.

[Batch Updating](#) which will simultaneously modify of a group of records.

# Sign into TMS Collections

When TMS Collections first loads, a login page will display with spaces for username and password.

In the following scenarios, an error message will display when login is attempted:

- The institution does not have a valid TMS Collections license.
- All user licenses ("seats") are in use.
- The user does not have granted access to TMS Collections.
- The user already has two active sessions of TMS Collections. This includes sessions of TMS Composer for Collections.

# Dashboard

After a successful login, the TMS Collections **Dashboard**, or Home page will load.

From this page, the following actions can be performed:

- Perform a [Dashboard Query](#) to open records
- [Search for Records](#)
- Dashboard [TMS Collections Toolbar](#) options:
  - [Add a New Record](#)
  - Open the [Media Working List](#)
  - [Download/Upload Media files](#)
  - Produce a [Task Report](#)

Return to the Dashboard is available from any page in TMS Collections by clicking the **Home** button in the [toolbar](#).

# TMS Collections Product Banner

The **TMS Collections** product banner contains the following features:

[TMS Collections Toolbar](#)

[Login dropdown](#)

[Search \(Advanced Query Search\)](#)

[Language](#)

# TMS Collections Toolbar

| Button   | Action                                      | Notes   |
|--|---|---|
| (Orange - house)   | <a href="#">Home/Dashboard</a>              | Return to the Dashboard.  |
| <br>(Green - plus sign) | <a href="#">Add New Record</a>              | Records may be added to any module, from any page. Packages are module-specific and cannot be created from the Dashboard.                       |
| (Yellow - Document)  | <a href="#">Reports (Crystal or SSRS)</a>   | Crystal or SSRS Reports. Specific to the currently open record selection and cannot be created from the Dashboard.                              |
| (Pink - Images)  | Open <a href="#">Media Working List</a>     | Available in any module.  |
| (Purple - Up/Down arrows)  | <a href="#">Upload/Download Media Files</a> | Uploads and downloads image files for use in Media records.   |
| (Red - Paper stack)  | <a href="#">Batch Update</a>                | Performs modifications to groups of records.<br><br>Specific to the currently open record selection and cannot be performed from the Dashboard. |
| (Turquoise - Cart)   | <a href="#">Move Assistant</a>              | This button opens the Move Assistant to move an Object or Crate. It is available only in the Objects and Crates modules.                        |
| (Brown - Clock)  | <a href="#">Task report</a>                 | Schedule a task list report for a specific time range.  |
| (Link)   | <a href="#">Related Records</a>             | Opens records related to the currently open record or record selection. Not available from the Dashboard.                                       |

# Login dropdown

In the TMS Collections [Product Banner](#), the list that displays the login (or username) has a list with options that provide information or access to special features.

- [Application Settings](#)
- [Manage Queries](#)
- [Change Package Owner](#)
- [Manage Package Folders](#)
- [Keyword Search Preference](#)
- [Media Importer](#)
- [Manage Media Importer](#)
- [Manage Working Folders](#)
- [About](#)
- [Logout](#)

# About

The About pop-up window provides the following information. This information is often required when troubleshooting issues with the System Administrator or Customer Care.

- Copyright details
- Current User
- Server Name
- DBName
- Server Type
- Server Version
- Selected Language
- TMS Collections Version and Build Number

# Application Settings

*Content for this page will be provided in a future release.*

# Language

The Language dropdown determines the language used for labels and captions in TMS Collections.

It does not affect content. Dates will display in the format in which they were entered, even if the Language selection is changed.

In order to ensure that dates display in the format corresponding to the language, use the [Settings \(Language\)](#) option in the Login dropdown.

[Languages](#) are managed in the [TMS Suite Application Configuration Utility](#).

# Logout

The Logout option is available in the [Module Banner](#) in the dropdown that displays the username.

If a browser session or tab is closed while there is an active TMS Collections session, any data that was entered will be saved.

Without logging out, a user session will expire after approximately 8 hours. The time for session expiry can be modified in the [TMS Suite Application Configuration Utility](#).

# Module Banner

TMS Collections has a module banner across the top of every page.

It contains the following:

- Identifies the current [module](#) (or [Dashboard](#))
- [Navigation bar](#) on the far right (when editing or viewing records)
- [Display Mode](#) selection buttons
- [Quick Search](#) fields (search value, search by module number, Search button)

# Settings (Language)

The Settings option allows the selection of the UI content language.

Unlike the [Language](#) selection which translates only labels and captions, the settings here will also translate some content. Depending on the locale, dates for the selected language will be translated to the appropriate format (for French, 9/21/22 will be display as 21/9/22).

## Available Language Settings:

Locale (Country)

Language

Date (Short Date, Long Date, Medium Date, Full Date)

Calendar (Gregorian, Hebrew, Buddhist, Islamic, Persian, Um-Al-Qura)

The User and Global tabs will apply the settings to either the current user, or all TMS Collections users.

Any changes to the Settings will require a re-login to be effective.

# Using TMS Collections

In **TMS Collections**, the basic functions of record management - including adding, deleting, updating, and linking - are similar in all **Modules**.

This section provides generalized, product-wide instructions for these functions.

Use the module-specific links on a page to access module-specific functions.

# Search for Records

In **TMS Collections**, there are several different ways to search for records:

Perform a [Quick Search](#)

Perform an [Advanced Search](#)

Perform a [Dashboard Query](#)

[Open Records from a Package](#)

Open Records from the [Media Working List](#) (opens Media records only)

Open Records from the [Object Working List](#) (opens Object records only)

[Navigate to Linked or Associated Records](#)

Database searches return records from a single module. Therefore, a search in the Objects module will only return Object records, but in those Object records, linked records from other modules will be accessible.

# Quick Search

A **Quick Search** performs a database search based on 3

- The module being searched - the type of records to return
- The search value entered by the user
- The fields to be searched: a group of fields ([keywords](#)), or the module-identifying field ([Module Number](#))

## Perform a Quick Search

1. On any page in TMS Collections, in the [module banner](#), select a **module** from the list to specify the type of records to return.
2. Keyword Search is the default option. To search only the module-identifying field in a record, select **#** to perform a [Module Number search](#).
3. Enter the **Search Value**. It is free-text field and does not provide selections. For information on the use of special characters in the search value, refer to [Quotations, Spaces, and Wildcard Characters in Quick Searches](#).
4. Select **Search**.
5. A [List View Preview](#) of the search results will open.
6. Optional: Select **Download** in order to download the search results into an Excel spreadsheet.
7. Optional: **Select Filter Records by Category** in order to refine the search results using a preconfigured filter.
8. Select a [Display Mode](#) for the search results (Detail, List, or Light Box). Detail is the default selection.
9. Select **Open** in order to open all of the records in the List View Preview, or select/check individual records and then select **Open Selected Records** in order to open only specific records. The records will open in the selected Display Mode.

# Keyword Search

A **Keyword Search** queries records based on the value in a set of preconfigured fields, known as **Keywords**. Keywords are configured in the [TMS Suite Application Configuration Utility](#).

Some Keywords may be more important, or relevant, than others when searching. The records returned first should be those with Keywords of higher importance. The **Importance** of Keyword fields is set in [Manage Keyword Search Preference](#).

# Manage Keyword Search Preference

In order to have search results returned in order of importance of the field matching the criteria, its importance must be ranked.

By default, all fields that are configured for Cross-Field searching will display in the list, be set to Included, and have 100% importance.

Fields can be included or eliminated from Cross-Field searching by modifying Include.

The order of results is determined by the percentage of the Keyword Importance. The higher the percentage, the higher in the result set the matching record will be returned. Increasing the field's importance is often referred to **boosting**.

## Set the Importance of Keywords in a Cross-Field Search

1. In the Login dropdown, select **Keyword Search Preference**. A list of database fields in the selected module that have been [configured for Cross-Field Searching](#) will display. The list includes the database table and query group to which each field belongs.
2. Select **Include** if the field should be searched in Cross-Field Searches.
3. If a field matching the search criteria should have its record returned *after* other records matching the search criteria, **lower** the percentage.
4. If a field matching the search criteria should have its record returned *before - above* - other records matching the search criteria, **increase** the percentage.

# Module Number Search

A Module Number Search will search only the field that identifies the record for the entered value. It is not available in all modules.

All of the steps are the same as a standard Quick Search, but with # selected next to the search value.

## Module Number Search Fields

| Module             | Field searched for entered value   |
|--------------------|------------------------------------|
| Bibliography       | Module Number search not available |
| Constituents       | Module Number search not available |
| Crates             | Crate Number                       |
| Exhibitions        | Exhibition Title                   |
| Insurance Policies | Policy Number                      |
| Loans              | Loan Number                        |
| Media              | Rendition Number                   |
| Objects            | Object Number                      |
| Shipping           | Shipment Number                    |
| Sites              | Site Number                        |

# Quotations, Spaces, and Wildcard Characters in Quick Searches

In Quick Searching, wildcard characters can be used to represent one or more characters in the search value.

Additionally, the use of spaces and/or quotation marks will affect the search results.

| Character /punctuation |     | Description   | Results   |
|------------------------|-----|---|---|
| asterisk               | *   | Represents one or more characters   | Col* will return cold, collections, color, colonel                    |
| question mark          | ?   | Represents a single character   | Col? will return only cold  |
| spaces                 |     | separates words into search terms   | "Sunny Day" will return records with Sunny Day, Sunny, and Day        |
| quotes                 | " " | defines the search term and is used to combine multiple words into a single search term | "Sunny Day" will return only records with Sunny Day, not Sunny or Day |

 Commas ( , ) are not recognized as separators in searching. It will be interpreted as one of the search values. So *blue, painting* will return records with the value *blue, painting, or ",*.

# List View Preview

When performing a Quick Search, a **List View Preview** of the search results will open first. The Preview List has similar options to [List Display Mode](#).

## Preview List Options

| Option                              | Description  |
|-------------------------------------|--|
| List View                           | Available List Views for reviewing the Preview List                                      |
| +/-                                 | Enlarge display of list/undo   |
| Up+Down arrow                       | Sort   |
| Selected record Count (read-only)   | The number of records in the Preview List that have been selected/checked                |
| Filter records by category (funnel) | Refine the search results using a preconfigured filter                                   |
| Download                            | Export all search result rows to an EXCEL spreadsheet                                    |
| Display Mode buttons                | Open the Preview List records in the selected Display Mode (Data Entry, List, Light Box) |
| Open                                | Open all records or Open selected records  |
| Checkbox                            | Select a record to Open or Download  |
| Record Count (read-only)            | The number of records in the Preview List  |

# Refine Search Results

The List View Preview has an option to refine the search results based on the value in specific fields.

1. In the Preview List, select **Filter By Category**. A list of fields by which to filter the results will display.
2. **Select a field** on which to filter and expand it. A list of values for that field in the search results will display.
3. **Check/select** the values to *retain*. Records with values that are unchecked will be removed from the Preview List.
4. Select **Refine**. The Preview List will be updated.

The **Filter By Category** options are preconfigured for each module

- Objects: Department, On View, Public Access
- Constituents: Active, Nationality, Public Access, Role Type
- Crates: Active, Climate Controlled, Oversize, Project, Type
- Events: Active, Department, Event Type, Public Access.
- Exhibitions: Department, Exhibition Status, In-House Exhibition, Public Information, Traveling Exhibition, Virtual Exhibition
- Loans: Foreign Lender, Loan In, Loan Purpose, Loan Status, Loan Type
- Media: Approved for Web, Department, Public Access
- Objects: Department, On View, Public Access
- Shipping: Department, Shipment Purpose, Shipment Status, Shipment Type
- Sites

# Advanced Search

An **Advanced Search** performs a query based on one or more conditions. Unlike Quick Search, which can only search on the values of preconfigured [Key words](#) or Module-level numbers, an Advanced Search offers more options.

New queries may be created in **Query Designer**, or previously saved queries may be selected from a list using **Load Query**.

## Perform an Advanced Search

1. Select **Search** (magnifying glass) in the [TMS Collections Product Banner](#).
2. Select **Field-Specific Search** or [Search by Location](#). Field-Specific Search will be selected by default.
3. Select a **Module**.
4. To create a new query, select [Query Designer](#) (cogs), or to use a previously saved query, select [Load Query](#).
5. Follow the steps for the method selected - Query Designer or Load Query. When done, the window for that option closes, and the Query Name will be populated with either a temporary name generated by Query Designer, or the name of the saved query that was selected.
6. If the query was just created in Query Designer, it may be saved for future use. Refer to [Save a Query](#).
7. Optional: select a [Custom Filter](#) to refine the search results.
8. Optional: change the default [Display Mode](#) for the search results.
9. Select **Search** (magnifying glass) to run the query. The search results will open in the Display Mode that was selected.

# Query Designer

**Query Designer** is used to create an advanced query for a database search. The query can be run immediately or saved for another time.

Query Designer has 3 tabs available for selection: *Search For*, *Sort*, and *SQL*.

**Search For** is where query conditions are built and added to the search.

**Sort** is where the sort order is set for the query's search results.

**SQL** provides a preview of the SQL Statements that are generated from the query conditions in *Search For*.

## Create a Query Using Query Designer

1. In the Product Banner, from any module, select **Search** (magnifying glass). A Search panel will open.
2. Select **Query Designer** (cogs). Query Designer will open.
3. Follow the steps to [Build a Query in Query Designer](#).
4. When Query Designer closes, the Query Name will be populated with a temporary name for the query that was just created ("Ad Hoc *date time*").
5. Optional: [Save the query for future use](#).
6. Proceed with steps to perform an [Advanced Search](#).

# Build a Query (Search For tab)

The **Search For** panel of Query Designer is where an Advanced Query is composed. Query conditions are built and added to the *Conditions Grid*.

The **Conditions Grid** contains all of the conditions in a query.

If no search conditions are added and OK is selected, then no conditions will be applied to the search and all records will be returned.

## Add a Condition

A Condition requires 3 basic elements: Field Name, Relation (Operator), and Field Value (if Relation is not *is empty*).

1. In the Conditions Grid, select **Add**  in the toolbar. A new, empty row is added to the grid.
2. [Select a Field Name](#).
3. [Select a Relation](#) (comparison operator).
4. Enter a [Search Value](#).
5. Optional parameters:
  - a. **And** combines a single condition or group of conditions.
  - b. **Or** is used in combination with a single condition or group of conditions.
  - c. **Not** negates a single condition or group of conditions.
6. Optional: [Group Conditions](#).
7. Optional: [Combine multiple queries](#).

## Delete a Condition

1. **Select/Check** the **row** in the Conditions grid.
2. In the grid **toolbar**, select **Delete**  grid.

## Reordering a Condition

Reordering a Query Condition may be required to change the search.

1. **Select** the row checkbox for a single condition or a condition group row.
2. In the grid **toolbar**, select either **Move Up** or **Move Down**.

When reordering conditions, the moved condition will traverse the grid, moving in and out of any existing condition groups. A condition may be moved in or out of an existing group this way.

# Select a Field Name

Fields are added to a Condition from either of the following sources: a *Field Group* or the *Relationship Diagram*.

## Select Field Name from a Field Group

A **Field Group** is a preconfigured set of fields which can be used for query field selection. They are concise lists from which to select fields and are usually subsets of all fields in a single entity. Field Groups are often related to a specific task such as Accessioning. They are maintained in the [Query Groups](#) section of the [TMS Suite Application Configuration Utility](#).

1. In the Search For tab, select a **Field Group** from the list above the Conditions Grid.
2. In the Conditions Grid toolbar, select **Add > Add From Field Group**. A new row will be added to the grid.
3. In the newly added grid row, make a selection from the list in the Field Name column. The entity that the field belongs and any other required related entities will be automatically added to the Relationship Diagram if it is not already present



The first time a selection is made from a Field Group, the fields added to the *Field Name* list will be limited to those belonging to the Field Group. In subsequent field selections, the *Field Name* list will be populated with all searchable fields from the entity to which that first selected Field Name belongs.

## Select Field Name from the Relationships Diagram

The **Relationships Diagram** represents the hierarchical relationships between fields in the module being searched. It displays in the right panel of the Search For tab.

1. In the Search For tab, select an **Entity** rectangle on the Relationships diagram. It will change in appearance (color or highlight).
2. If this is the first time the field is selected, this determines the list of fields available in the *Field Name* column.
3. In the Conditions grid toolbar, select **Add > Add From Relationship Diagram**. A new row will be added to the grid.
4. In the newly added condition row, make a selection from the list in the *Field Name* column.

## Select an Operator (Relation)

In Query Designer, the operators available are determined by the field type of the field being searched.

Advanced Searching does not recognize the *wildcard* character \* in search values. Unlike Quick Searching, if \* is entered as a search value (either as part of whole of the search value), it will be treated as a character and the search will be for fields containing an asterisk. So, **abc\*** will only return records for the value abc\*, not abcdef.

In order to create a *wildcard* condition, use a combination of *Contains*, *Starts With*, and *Ends With* search conditions.

# Operators for Numeric Fields

| Operator     | Description                   | Notes  |
|--------------|-------------------------------|--|
| equals       | exactly the same              |  |
| is more than | greater than                  | Does not include the search value                                |
| is less than | less than                     | Does not include the search value                                |
| is empty     | Text, Numeric, checkbox, date | A value has not been entered. This does not include zero values. |

# Operators for Text and Checkbox Fields

| Operator                                       | Description   | Note  | Examples   |
|--|---|---|--|
| contains                                       | Searches for records where the specified field contains the search Value <b>al one or as part of a word</b> in any position.<br><br>When multiple values are specified, the field will be searched for either value (an OR search) if there are no quotation marks. If the values are enclosed in quotation marks, the field is searched for the complete string. |   | Description contains red: will return "red", "cared", "reddish", "infrared"<br><br>Description contains red cover: will return "reddish base", "complete coverage"   |
| equals   | Exact value of a string, or the checked/unchecked state of a checkbox.  |   | Object Number equals "abc" will return any record whose Object Number is "abc"   |
| in   | Searches for records where the specified field contains at least one of the search values.  |   |  |
| is empty                                       | No value has been entered.  |   |  |
| ends with                                      | Searches for fields that end in the search value. When multiple words are specified, the field will be searched for the <b>complete string as if it were enclosed in quotation marks</b> .  |   | Description ends with red: will return "This demonstrates that everyone cared", "The only color in the selection is red."<br><br>Description ends with red cover: will return "The item is protected by a red cover", but not "The item is protected by a red cover and a waterproof coating." |
| starts with                                    | Searches for fields that start with the search value. When multiple words are specified, the field will be searched for the <b>complete string as if it were enclosed in quotation marks</b> .  |   | Description starts with red: will return "Red is the only color in the selection", "Redding, CA"<br><br>Description starts with red cover: "Red cover must be fastened securely", "Red covering indicates that the item has been treated."   |
| contains words                                 | Searches for records where the specified field contains the search Value as a <b>complete word</b> in any position.<br><br>When multiple values are specified, the field will be searched for either value (an OR search) if there are no quotation marks. If the values are enclosed in quotation marks, the field is searched for the complete string.          | only available for long text fields (more than 80 characters) | Description contains words red: will return "red", "almost red", "red lining."<br><br>Description contains red coverage: will return "red", "almost red", "complete coverage" <i>not</i> "slight redness", "run for cover."  |
| contains terms                                 | Uses Thesaurus to obtain a search value.  | only available for long text fields (more than 80 characters) |  |
| contains terms (include thesaurus equivalents) | Uses Thesaurus to obtain a search value. The search will include equivalent concepts to the one selected in the Thesaurus. The field may contain the term in any position.  | only available for long text fields (more than 80 characters) |  |
| contains terms (include narrower)              | Uses Thesaurus to obtain a search value. The search will include narrower concepts than the one selected in the Thesaurus. The field may contain the term in any position.  | only available for long text fields (more than 80 characters) |  |



Unlike a Quick Search, the Advanced Search does not use wildcard characters. In order to perform an Advanced Search with similar logic to one using a wildcard character, the operators "contains", "contains words", "starts with", and "ends with" - or a combination of those comparisons - may be used.

# Operators for Date fields

| Operator      | Description   |
|---------------|---|
| after today   | Any date following the current date.  |
| before today  | Any date prior to the current date.   |
| equals        | An exact date.  |
| is empty      | <i>(No date has been entered.)</i>  |
| is less than  | Any date prior to the current date.   |
| is more than  | Any date after the current date.  |
| last year     | Any date in the year prior to the current year.   |
| last month    | Any date in the month prior to the current month.   |
| last 30 days  | Any date within the last 30 days. This includes the current date and the prior 29 days.             |
| last 7 days   | Any date within the last 7 days. This includes the current date and the prior 6 days.               |
| last 6 months | Any date within the 6 months prior to the current month. Does <b>not</b> include the current month. |
| next year     | Any date in the year after the current date.  |
| next month    | Any date in the month prior to the current date.  |
| next 30 days  | Any date within the next 30 days. This includes the current date and the following 29 days.         |
| next 7 days   | Any date within the next 7 days. This includes the current date and the following 6 days.           |
| next 6 months | Any date within the next 6 months. This includes the current month and the following 5 months.      |
| this year     | The current year.   |
| this month    | The current month.  |
| today         | The current date.   |
| tomorrow      | The date after the current date.  |
| yesterday     | The date prior to the current date.   |

# Enter or Select a Search Value

In Advanced Query, a Search Value may be entered or selected from a list of options or Authority Values. Checkboxes may be checked or unchecked.

Unlike Quick Search, special characters and punctuation are not interpreted any differently from other characters. Entering punctuation or a special character will result in a search that contains those characters, as if the entire string was contained in quotation marks. *Blue, painting* will search for "Blue, painting." *Blue\** will search for "Blue\*".

# Grouping Conditions

Conditions in the grid can be grouped together.

## Group Several Conditions Together

1. Select rows in the Conditions grid to be grouped together.
2. Press **Group** in the Conditions grid toolbar.

To be grouped together the selected conditions have to be either all ungrouped or to be members of the same group. Both single condition and condition group rows can be selected to be grouped together. **Group** toolbar button is enabled only when more than one row is selected.

Once conditions are grouped a new *condition group* row is added to the Conditions grid - all conditions in the newly created group are shown as immediate children of the condition group in a tree-like view. When a condition group is collapsed it is labeled with a presentation of the combination of all conditions in the group.

## Ungroup Grouped Conditions

1. Select condition group row in the Conditions grid.
2. Press **Ungroup** in the Conditions grid toolbar.

Single conditions can be moved into the existing group or out of the existing group by using **Move Up** and **Move Down** actions described below.

# Combine Queries

Query Designer allows for the design of a complex query as a combination of multiple queries. Besides the main query, the user can define additional queries combined with the main one using the following set operations:

1. Union
2. Except
3. Intersect

When a query is added using *union* operation its results are added to the results from the main query. An *except* query results will be subtracted from the main query results. When using *intersect* operation only the records, which are present in both query results are included in the final result set.

Currently there is no limit on how many queries can be combined with the main query - the set operators are applied in the order the queries are added.

## To Add a Query to the Main Query:

1. Press + next to *Main Set* tab in the bottom tab strip.
2. Select *Union*, *Except* or *Intersect* from the menu - a new query panel will be added with the tab labeled using the chosen set operator (Union, Except or Intersect).
3. Design the added query on the new tab.
4. Use tabs in the bottom tab strip to switch between queries.

To delete added queries press **x** on the query panel tab. The main query cannot be deleted.

# Sort Query Results (Sort tab)

Sort order of the query results is configured in the **Sort** tab. Sort fields may be added, removed, or reordered in the list.

In order to configure sorting, there must be at least one condition in the Conditions grid.

## Configure Sort Order of Query Results

1. Select the Sort tab in Query Designer.
2. Select **Add**  to add a field. A new row will be added to the grid.
3. In the new row, select a Field Name.
4. Select a Direction (Ascending/Descending).

## Change field order for Sorting

1. Check the row of the sort field to move.
2. Select the **Up** or **Down** Arrows to move the field to a new Sort Level.

## Delete a Sort Field

1. Check the row of the sort field to delete.
2. Select **Delete** (Trash). The row will be removed from the Field Name list.

# SQL

The SQL tab in Query Designer contains the SQL statements that are generated by the conditions in the [Conditions grid](#). By providing a way to view the actual SQL statements, a query can be checked to determine if the search is what the user intended.

The SQL tab is read-only. The only way to modify the SQL statements is to modify the conditions in the [Search For](#) tab.

# Save a Query

When Query Designer closes, the newly created query can be saved for future use.

1. When Query Designer closes, select **Save Query**.
2. Enter a **Name** and (optional) **Description**.
3. Select one or more *Query Options* to make the query available to other TMS Collections users.
4. Select **Save/Close**. The query will now be available for selection in Manage Queries.

## Query Options

When a query is saved, the following options make the query available to all TMS Collections users.

- **Shared** will make the query available in [Load Query](#).
- **Global** will make the query available in [Manage Queries](#) for selection as a [Dashboard Query](#) or [Custom Filter](#).
- **Use as Filter** will make the query available as a [Custom Filter](#).
- **Use on Dashboard** will make the query available on the [Dashboard](#).

# Load Query

To perform an Advanced Search using an existing query, select **Load Query**. The **Select Query** window opens

Optional: select [Manage Queries](#) to change the available queries in the list.

Select a query from the list, then **Select**.

The window will close and in the search panel, Query Name will be populated with the name of the query that was selected.

Proceed with steps for [Advanced Search](#).

# Search by Location

A search for an Object can be performed based on its current, Home, or previous location.

1. Select **Search** from the product toolbar.
2. Select the option **Switch to Search by Location**.
3. Select one of the following options for the type of location: **Current** (the object's present location), **Home** (the object's assigned location), or **History** (a location that the object was moved to in the past).
4. Select **Location Lookup** (location icon) to open the Locations Authority.
5. Select an Internal or External location from the authority and then choose **Select**. The authority list closes.
6. Optional: select/Check **Include child locations** to expand the search to children of the selected location.
7. Optional: select a [Custom Filter](#) to refine the search results.
8. Optional: change the default [Display Mode](#) for the search results.
9. Select **Search** (magnifying glass) to run the query. The search results will open in the Display Mode that was selected.

# Sample Advanced Queries

*Content will be provided in an upcoming release.*

# Manage Queries

**Manage Queries** allows Advanced Queries to be saved and designated for different purposes. It is available in two places: the [Login dropdown](#) or [Save Query](#) (after building a query in [Query Designer](#)).

## Query Options

| Option           | Description  |
|------------------|--|
| Name             | A unique name to identify the query in future use.   |
| Description      | A description of the search that is performed by the query.  |
| Shared           | Makes a query available to all TMS Collections users in <b>Select Query</b> . This field is enabled only for the creator of the query.   |
| Global           | Makes query available to all TMS Collections users in the selection lists for <b>Dashboard Query</b> and <b>Custom Filter</b> . This field is enabled only for the creator of the query.       |
| Use as Filter    | Makes query available for use in as a <b>Custom Filter</b> ; if <b>Global</b> is not selected, the query will only be available to the creator.  |
| Use on Dashboard | Makes query display on <b>Dashboard</b> ; if <b>Global</b> is not selected, the query will only be available to the creator. (Refer to <a href="#">Dashboard Queries</a> for more information) |

## Add a query to the Dashboard

1. In the Login dropdown, select **Manage Queries**.
2. Select **Dashboard Query**.
3. Select **Add**  and a list of queries will become available for selection.
4. Select a query in the list and then select **OK**. The selection will display in the list of Dashboard queries.
5. Select **Close**. The selected newly added query will now display on the Dashboard.

## Remove a query from the Dashboard

1. In the Login dropdown, select **Manage Queries**.
2. Select **Dashboard Query** to display the list of queries currently configured to display on the Dashboard.
3. Select the query and then select  to remove it.
4. The query will be removed from the list.
5. Select **Close** and **Manage Queries** will close. The query will no longer display on the Dashboard.

## Create a Custom Filter

1. In the Login dropdown, select **Manage Queries**.
2. Select **Filter** to display the list of queries available for selection when searching.
3. Select **Add**  and a list of queries will become available for selection.
4. Select a query in the list and then select **OK**.
5. The selection will display in the list of Filters. Select **Close**. The query now be available for selection as a **Custom Filter** in Search.

## Remove a Custom Filter

1. In the Login dropdown, select **Manage Queries**.
2. Select **Filter**.
3. Select the query to remove and then select **Delete**  in the list toolbar.
4. The query will be removed from the list. Select **Close**. The query will be no longer be available for selection as a **Custom Filter** in Search.

# Add a Query to the Dashboard

An existing or newly created query can be set to display on the Dashboard using [Manage Queries](#), which can be invoked from the [Login dropdown](#) or [Save Query](#).

## Add a Query to the Dashboard

1. From the Login dropdown or the Save Query window, select [Manage Queries](#).
2. Select **Dashboard Query**.
3. Select **Add**  and a list of queries will become available for selection.
4. Select a query in the list and then select **OK**. The selection now displays in the list of Dashboard queries.
5. Select **Close**. The selected newly added query will now display on the Dashboard.

## Remove a Query From the Dashboard

1. From the Login dropdown or the Save Query window, select [Manage Queries](#).
2. Select **Dashboard Query** to display the list of queries currently configured to display on the Dashboard.
3. Select the query and then select **Delete**  to remove it. The query will be removed from the list.
4. Select **Close** and Manage Queries will close. The query will no longer display on the Dashboard.

# Custom Filters

**Custom Filters** are queries that can be added to an Advanced Search to further refine search results.

A saved query can be configured to display on the Dashboard in Save a Query or Manage Queries.

## Set a Custom Filter

1. In the Login dropdown, select **Manage Queries**.
2. Select **Filter** to display the list of queries available for selection when searching.
3. Select **Add**  and a list of queries will become available for selection.
4. Select a query in the list and then select **OK**.
5. The selection will display in the list of Filters. Select **Close**. The query now be available for selection as a **Custom Filter** in Search.

## Set a Custom Filter when saving a query

### Remove a Custom Filter

1. In the Login dropdown, select **Manage Queries**.
2. Select **Filter**.
3. Select the query to remove and then select  in the list toolbar.
4. The query will be removed from the list. Select **Close**. The query will be no longer be available for selection as a **Custom Filter** in Search.

# Perform a Dashboard Query

**Dashboard Queries** are saved queries that automatically display results on the **Dashboard** (Home page) after login or when **Home** is selected. They are useful for records that are frequently accessed based on a specific criteria, but unlike a Package, which requires maintenance, they will only return records that meet the search criteria at the present time. The queries may be for any module in TMS Collections.

A saved query can be configured to display on the Dashboard in [Save a Query](#) or [Manage Queries](#).

A Dashboard Query's results display in a [collapsible](#), [scrollable](#) grid beneath the banner containing the query name. Scrolling may be required for viewing all of them. Query size configured. (redo)

## Open Dashboard Query Results

1. In a Dashboard Query, select a **Display Mode** for the search results.
2. Select **Open All** to open all of the search results, or select the desired records and then **Open Selected Records**. The records will open in the selected Display Mode.

# Open Records from a Package or Working List

When records are opened from a Package, Media Working List, or Object Working List, a search is performed for their records. The search results will replace the current record selection.

[Open records from a Package](#)

[Open records from the Media Working List](#)

[Open records from the Object Working List](#)

# Open Linked Records from a List View

In the Record Hierarchy Tree, when a node representing linked records is selected, a List View of the linked records displays in the center panel.

Selecting the List View option **Open All** (or **Open Selected Records**) performs a search for the linked records. The search results display in Detail View, replacing the current selection of records.

# Quick Search vs. Advanced Search

TMS Collections provides both a Quick Search and Advanced Search feature.

Quick Searches will search the database for records that contain the search value that is entered by the user. The fields that are searched are limited to module-number fields (Object Number, Loan Number, etc.) and fields that are preconfigured for searching in the [TMS Suite Application Configuration Utility](#).

Advanced Searches will search the database for values in a specific field, or combining more than one search condition (more than one value in more than one field).

Knowing the appropriate search to use is key to saving time and effort.

| Quick Search  | Advanced Search           |
|---|---------------------------|
| One search value  | Multiple search values    |
| Search only on module-level identifier or configured keywords | Search on multiple fields |
|   |                           |

# Display Modes for Viewing Records

In TMS Collections, records can be opened in one of 3 display modes: [Data Entry](#), [List](#), and [Light Box](#).

Records are viewable in any display mode, but can only be edited in Detail.

# Data Entry Display Mode

**Data Entry display mode** divides the page into two main areas: the hierarchy panel and the data area.

The hierarchy panel, on the left, displays the following

[Record Hierarchy Tree](#) (default) or the [Record Set Tab](#)

[Available Data Forms \(Data Entry Views\)](#)

The data area, on the right, displays the following:

The current record in a Data Form; in some instances, data displays in a List View or read-only Data View (this is determined by the node that is selected).

An expandable right panel for [Packages](#) and, alternatively, in Objects only, the [Object Working List](#). This panel is the same in all display modes.

# Data Forms (Data Entry Views)

A Data Form (or Data Entry View) is a preconfigured collection of fields or widgets that provide a way to view, enter or modify the data in a single record. A **widget** may represent a single field, multiple fields, or in some cases, multiple records that are logically related to the current record. [Standard Feature Widgets](#) also perform certain tasks, including linking to records in other modules.

**Data Form** and **Data Entry Views** are the same and the terms are interchangeable.

The Data Form always displays in the center panel of the page, between the [Record Hierarchy Tree](#) panel on the left, and the expandable sidebar panel with the [Packages](#) option on the right.

If a user does not have the necessary permissions, the fields or widgets on a Data Form will not be enabled for editing.

TMS Collections provides Data Forms for all modules and any contexts for which the user can view records. Custom [Data Forms](#) are configured in [TMS Composer](#).

# Available Data Forms (Data Entry Views)

In [Data Entry display mode](#), beneath the Record Hierarchy Tree is a list of **Available Data Entry Views**.

There is at least one Data Form for every context where one is required. If more than one is available, a different Data Form is displayed by selecting it in the list.

For more information, refer to [Data Forms \(Data Entry Views\)](#).

# Record Hierarchy Tree (All Modules)

In TMS Collections, the **Record Hierarchy Tree** provides a hierarchical view of all data related to a record. It displays when a record is in [Data Entry display mode](#).

The tree is often referred to as simply the **Hierarchy Tree**.

In the tree, each node corresponds to either a category ([context](#)) of data related directly to the current record, or entire records that are related to the current record.

## Tree Nodes

The top tree node always represents the main record fields (the Object in an Object record).

The nodes directly beneath the top node may represent data that belongs in a sub-category of data - or [contexts](#) - for the current module (for example, the Components node in an Object record).

Nodes for records linked from another module are labeled with the module name of the linked records (for example, the Media node in an Object record).

Nodes for related records from the same module are labeled with the relationship to the current record (for example, Parent records).

Every module has an a unique tree configuration, and some modules have more than one tree available. Refer to the tree configuration in each module.

[Bibliography Hierarchy Tree](#)

[Constituents Hierarchy Tree](#)

[Crates Hierarchy Tree](#)

[Events Hierarchy Tree](#)

[Exhibitions Hierarchy Tree](#)

[Insurance Policies Hierarchy Tree](#)

[Loans Hierarchy Tree](#)

[Media Hierarchy Tree](#)

[Object Hierarchy Tree](#)

[Shipping Hierarchy Tree](#)

[Sites Hierarchy Tree](#)

# Record Set Tab

In [Data Entry display mode](#), the left panel displays either the Record Hierarchy Tree or the Record Set tab.

Selecting the Record Set tab will display a list of the currently open records (the Record Set, or Record Selection). Each row in the list contains a record's Primary Image thumbnail and module-level identifying fields (Object Number and Name, Rendition Number, Exhibition Title, etc.).

To navigate using the Record Set tab, select a record in the list. The selected record will automatically open.

## Record Set Tab vs. List Display Mode

Using the Record Set tab differs from viewing the current record selection in [List display mode](#).

The Record Set tab has limited functionality - it allows scrolling through the list of the current selection, and navigation to a selected record.

List display mode has the option to zoom, change displayed fields (by selecting a different List View), and [export](#) the list to an EXCEL spreadsheet.

# Light Box Display Mode

In Light Box, the primary image for each record displays in a frame, without any data except the record identifier.

The right panel, which contains the Packages tab and Object Working List (in Objects) is the same as in other display modes.

# List Display Mode

In List display mode, preconfigured [List Views](#) display all of the records in the [current selection](#) in a list. The right panel, which contains the Packages tab and Object Working List (in Objects) is the same as in other display modes.

As with all List Views, the sort order may be changed by clicking on the column header of the field to sort by.

## List Display Mode Options

| Button/widget             | Description                                      |  |
|---------------------------|--|--|
| +/-                       | Enlarge display of list/undo                     |  |
| Download                  | Export all/selected rows to an EXCEL spreadsheet |  |
| Navigation button         | Will perform navigation to the selected record   |  |
| Save as Preference (star) | Saves the sort order                             |  |

## Navigation in List Display Mode

In List display mode, navigation to another record may be performed so that if Data Entry display mode is then selected, the newly selected record will display. The Navigation button on the top left of the list must be "on" in order for navigation to occur.

1. Select the **Navigation** option on the top left of the list to enable navigation.
2. Select **a record** (row) in the list.
3. Select **Data Entry display mode** (solid square). The selected record will be open in [Data Entry display mode](#).

# Add a New Record

New records are added using the Add  option in the [TMS Collections Toolbar](#). The option is available in all modules.

New records can be added to any module, and is not dependent on the current one.

[New Package records](#), however, must be created from the module where the Package will be used - the option to create them is not available from the Dashboard.

## Add a New Record From the Toolbar

The following is for adding records at the module level. It does not apply to new Packages.

1. Select **Add ** in the toolbar.
2. Select a **module**. The New Record window will open.
3. Provide values for the **required fields** (this will be different in each module).
4. Select **Add**. The new record will load in [Data Entry display mode](#).

Refer to the field requirements for new records in each module:

[Add New Object Record](#)

[Add New Constituent Record](#)

[Add New Media Record](#)

[Add New Loan Record](#)

[Add New Exhibition Record](#)

[Add New Bibliography Record](#)

[Add New Shipment Record](#)

[Add New Event Record](#)

[Add New Site Record](#)

[Add New Insurance Policy Record](#)

[Add New Crate Record](#)

## Add a New Record and Associate with the Current Record

In some modules, a new record may be created when [associating](#) records from the same module. Instead of performing a lookup for a record to link, select the available **New Record** option.

[Associate Object with another Object](#)

# Batch Update Multiple Records

**Batch Update** modifies a single field in a group of records at one time. It can be performed on the current record selection, or on records linked to the current record.

To update a field in the *current record selection*, select the Batch Update option in the main Toolbar ([Batch Update the Current Record Selection](#)).

To update a field in *records linked to the current record*, select the Batch Update option in the linked module's List View toolbar ([Batch Update Records Linked to the Current Record](#)).

# Batch Update the Current Record Selection

1. Select **Batch Update** in the [TMS Collections Toolbar](#). The Batch Update window opens.
2. Select a field from **Batch Update Fields/Widgets**. The **Update** radio button will become selected by default. For some fields, **Add** will be selected instead of **Update**. For most fields, other options will be disabled (future feature).\*
3. For some fields/widgets, additional selections may be required. Make the necessary selections.
4. Select **Load/Refresh**. A list of the current records and their value for the chosen field will display.
5. **Check/Select** the records to update, or **Select All**.
6. Enter a **Value to Assign** (the entry method is determined by the field being updated: free text, number, dropdown, or Thesaurus lookup).
7. Select **Apply**. A Process Report displays the status and the total number of records that were updated. If the **Total** and **Processed** counts are not equal, then an error has occurred and the linked records require examination.
8. Select **Close**.

\*The following fields have options other than *Update* available: [Attributes](#), [Statuses](#), [Flex Field Groups](#), [Geography References \(Geography Xrefs\)](#), [Single-Value Text Entries](#), and [Text Entries](#).

Refer to the page for each module for the list of fields available for batch updating.

[Batch Update Object Records](#)

[Batch Update Exhibition Records](#)

[Batch Update Media Records](#)

[Batch Update Constituent Records](#)

[Batch Update Loan Records](#)

[Batch Update Bibliography Records](#)

[Batch Update Event Records](#)

[Batch Update Insurance Policy Records](#)

[Batch Update Shipment Records](#)

[Batch Update Site Records](#)

For security settings, see **Batch Updating Records** on the [Special Functions Security](#) page and security settings on the above individual linked pages.

# Batch Update Records Linked to the Current Record

In some modules, records linked from another module may batch updated. This can only be performed on records linked to the current *record*.

1. In the Record Hierarchy tree, select the node labeled with the **module** name. A List View of the records linked from that module will display.
2. To update only specific linked records, select/check them.
3. In the List View toolbar, select the **three dots (...)** option.
4. To update only specific linked records, select **Batch Update selected** (*record name*); otherwise, select **Batch Update all** (*record name*). A Batch Update window opens.
5. Select the **Field/Widget** being updated.
6. **Update** will be selected by default. For some fields, **Add** will be selected instead of **Update**. For most fields, other options will be disabled (future feature).\*
7. Select **Initialize**.
8. Enter or select the **Value to Assign**.
9. Select **Apply**.
10. A Process Report will display. When the Status is Completed, if the **Total** and **Processed** counts are not equal, then an error has occurred and the linked records require examination.

\*The following fields have options other than *Update* available: [Attributes](#), [Flex Field Groups](#), [Geography Xrefs](#), [Single-Value Text Entries](#), and [Text Entries](#).

Refer to the page for each module for the list of fields in linked records that are available for batch updating.

[Batch Update Exhibition Objects](#)

[Batch Update Exhibition Venue Objects](#)

[Batch Update Loan Objects](#)

[Batch Update Objects Linked to the Shipment](#)

[Batch Update Object Components Linked to the Shipment](#)

[Batch Update Exhibitions Linked to the Shipment](#)

[Batch Update Loans Linked to the Shipment](#)

For security settings, see **Batch Updating Records** on the [Special Functions Security](#) page and security settings on the above individual linked pages.

# Delete a record

1. Select a record for viewing or editing.
2. Select [Data Entry display mode](#).
3. In the Record Hierarchy Tree, in the top node's dropdown list, select the option **Delete Record**.
4. A usage report may display to indicate if the record is linked to records in other modules. In some cases, deletion will be blocked and **OK** must be selected.
5. Answer **YES** to the confirmation message and the record will be deleted. The next record in the current selection will be loaded. If there are no more records in the selection, the message "no results found" will display.

## Record Usage Reports

When deleting a record, a [usage report](#) may display. This report will list all usages of the current record. Some types of usage will block the deletion.

# Record Usage Reports

When deleting a record, if that record contains any links, a *Record Usage Report* will display.

The **Record Usage Report** lists *counts* of the following:

- Related records (Parent, Child, See Also)
- Usage (the number of records linked from the other module in the current record)
- References to other modules (the number of records in another modules to which the current record is linked; this will occur only for Media and Constituent records)
- Usage in other TMS Suite products (Conservation Reports, Projects)

The report lists counts of each type of usage, not the actual links themselves. In order to view the related records, select the appropriate Record Hierarchy Tree node or Related Records option.

This report is informational - it warns the user that other records will be affected by the deletion of the current record.

In some instances, if the nature of the link prevents the record being deleted, the line pertaining to the blocking usage will display in red.

The rules for record deletion will differ in each module. Refer to each module for details.

[Object Usage Report](#)

[Constituent Usage Report](#)

[Media Usage Report](#)

[Crate Usage Report](#)

[Bibliography Usage Report](#)

[Event Usage Report](#)

[Exhibition Usage Report](#)

[Insurance Policy Usage Report](#)

[Loan Usage Report](#)

[Shipment Usage Report](#)

[Site Usage Report](#)

# Edit (View) a Record

Selecting a record for viewing or editing by using one of the the following methods:

[Search for a record](#)

[Open Package Records](#)

[Open record from a Package](#)

[Open record from Object Working List](#) (Object records only)

[Open record from Media Working List](#) (Media records only)

Viewing and editing records is the same in all modules in TMS Collections. Records can be viewed in all three [display modes](#), but can only be modified in [Data Entry display mode](#). [Light Box](#) and [List](#) display modes are read-only.

## Viewing and Editing

In TMS Collections, the same methods to [search for a record](#) are used for both modifying or viewing the record. The only difference is whether or not fields on the [Data Form \(Data Entry View\)](#) will be *enabled* for editing, and whether actions in the [Record Hierarchy Tree](#) will be available.

In Data Entry display mode, data is modifiable two ways: by entering or modifying a field in the Data Form, or by performing an action (linking or associating records) in the tree.

If a user does not have the required permissions for editing data, fields on the Data Form will be disabled and actions in the tree will either be disabled or unavailable.

## Saving Changes

If data for the current record is modified in the Data Form, the change will need to be [saved](#).

Changes are saved when:

- An option in the selected node in the Record Hierarchy Tree is performed
- A different node in the Record Hierarchy Tree is selected
- A different form is selected in Available Data Forms
- Navigation to a different record
- Return to the Dashboard
- Press **CTRL + S**

Some widgets save data automatically; these are mostly Standard Feature Widgets such as [Linked Media References \(MediaXRefs\)](#) and [Linked Constituent References \(ConXRefs\)](#).

Modifications to a single field in a group of records can be performed using [Batch Update](#).

# Entering and Modifying Data

Data in a record is entered or modified in a [Data Form \(Data Entry View\)](#) in widgets. A widget represents a single field, logically-related multiple fields, or logically related multiple records (such as Object Classifications).

# Save Changes to a Record

In [Data Entry display mode](#), once data is entered or modified in a field, the change is saved in several ways:

- Press CTRL + S
- Navigate to another record (using the [navigation arrows](#) or browser Back button)
- Make a different selection in [Available Data Forms \(Data Entry Views\)](#)
- [Perform a search](#), which will open a different selection of records
- Logout of the current session

In some fields/widgets in TMS Collections, changes are automatically saved. These widgets include, but are not limited to: [Linked Media \(MediaXRefs\)](#), [Linked Constituent \(ConXRefs\)](#), Object Titles, Dimensions, [Text Entries](#), and [Flex Fields](#).

# Link Records

In TMS Collections, records can be linked to other records in other modules, or the same module.

The purpose of linking to records in other modules is to reduce redundancy. Changes to a single record will be available when viewing any of its linked records, and vice versa.

Records are linked using one of the following methods:

- [Link an Existing Record](#)
- [Add a New Record to Link](#)
- Link Constituent and Media records using [Standard Feature Widgets](#) that perform linking ([Linked Constituent References \(ConXRefs\)](#), [Linked Media References \(MediaXRefs\)](#))
- [Link Records in the Object Working List](#) (only for linking Object records to the current record)
- [Link Records in a Package](#)

In some modules, the modules from which to link all records is limited.

When records are linked from the same module, they are called Associated records. Refer to [Associate Records from the Same Module](#).

Although the steps are similar in all modules, some modules have module-specific linking instructions, such as the label of the linking option in the Record Hierarchy Tree. Refer to the page for each module.



Not all links are actively created. Some links are automatically created. For example, in a Crate record, a link to a Shipment cannot be made. However, if that Crate contains an Object, then when that Object is added/linked to a Shipment, the Crate is automatically linked to the Shipment and it will be reflected in the Crate record in the Shipments node.

# Link an Existing Record

The option to link a record from another module will be available by selecting the node in the Record Hierarchy Tree that is labeled with the other module's name.

The option may not always contain the word "Link." It may say "Link (*module name*) record" or "Add (*current module name*) record to (*other module name*)."

## Search for Existing Records to Link

To link a record from another module, the record must first be located by performing a search.

1. In the Record Hierarchy Tree, select the top node option to **Link** a record from another module (or **Add** the current record to another module). A window labeled with the selection option will open.
2. Enter the **required values**. The requirements are the same as for a [Keyword Search](#).
3. To perform a [Module Number Search](#) instead of a Cross-field Search, select **Search module level fields only**.
4. Enter a [Search Value](#) that will identify the record in the other module.
5. Optional: select a [Custom Filter](#).
6. Select **Search** (magnifying glass). A List View of the search results will open.
7. Select/check the **record(s) to link**.
8. Select **Add**. The window will close, and the records that were selected from the search results will now be linked to the current record. The node labeled with the module's name will now have an adjusted count to reflect the newly linked records.

# Link a Record Using a Standard Feature Widget

In a record, Constituent and Media records can be linked using the [Linked Constituent References \(ConXRefs\)](#) and [Linked Media References \(MediaXRefs\)](#) widgets.

# Add a New Record to Link

In some modules, there is an option to create a new record to link to the current record. The record can be created and linked without leaving the current record.

## Link a New Record in Another Module

1. After selecting the option to link a record, select **New**.
2. Follow the steps for [Adding a New Record](#) in the *other* module.
3. After the record is created, it will be automatically linked to the current record.

## Link a New Record in Another Module (to Create an Association)

1. After selecting the option to link a record, select **New**.
2. Follow the steps for [Adding a New Record](#) in the *current* module.
3. After the record is created, it will be automatically linked to the current record.

# Unlink a Record

## Unlink from the Hierarchy Tree

In any module, the hierarchy tree has nodes representing individual linked records. Some of these nodes will have a child node for each record linked from another module.

When a linked child node is selected, the record may be unlinked if the node dropdown has the option to remove or unlink a record.

## Unlink from the XRef List View

In some modules, when the node representing the module of the linked records is selected, the [List View](#) in the center panel will have the option to remove or unlink the record.

This option is not available in all List Views.

Refer to the [Record Hierarchy Tree \(All Modules\)](#) of a specific module to identify the options for unlinking records.

# Data from Linked Records in Other Modules

When a record is linked from another module, data related to the link and from the linked record itself is accessible by selecting either a [Standard Feature widget](#) or a node in the [Record Hierarchy Tree](#).

## Access Linked Records in a Widget

In the current record, on a [Data Form \(Data Entry View\)](#), select the **Standard Feature widget** for the other module. This is not available for all modules.

- To view linked Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget.
- To view linked Media records, use the [Linked Media References \(MediaXRefs\)](#) widget.

## Access Linked Records in the Record Hierarchy Tree

### Module Node

- Select the node labeled with the **name of the other module**.
- A read-only [List View](#) will contain a summary of the records linked from the other module (often referred to as the **XRef List View**).
- The List View toolbar contains actions that can be performed on the linked records. The availability of options is determined by the specific context.
  - **Open** selected/**Open All** linked records in another module (available in all XRef List Views).
  - **Download** the List View of linked records to an [EXCEL spreadsheet](#).
  - **Remove** link to the current record.
  - [Batch Update fields in the linked records](#).
  - **Add/Remove records** from another linked module to the main record.
  - **Star (Preference)** - save the current grid layout (selection of fields) for the current user.

### Linked Record Node

- Select the node labeled with the **identifier of the linked record**.
- A preconfigured selection of fields related to the link (and in the linked record itself) display in a [Data Form](#).
- The fields may be editable or read-only (this differs across modules).

## Available Data from Linked Records

Refer to the specific module for a list of fields available from linked records:

[Linked Data \(From Records Linked to Objects\)](#)

[Linked Data \(From Records Linked to Constituents\)](#)

[Linked Data \(From Records Linked to Media\)](#)

[Linked Data \(From Records Linked to Crates\)](#)

[Linked Data \(From Records Linked to Bibliography\)](#)

[Linked Data \(From Records Linked to Events\)](#)

[Linked Data \(From Records Linked to Exhibitions\)](#)

[Linked Data \(From Records Linked to Venues\)](#)

[Linked Data \(From Records Linked to Insurance Policies\)](#)

[Linked Data \(From Records Linked to Loans\)](#)

[Linked Data \(From Records Linked to Shipments\)](#)

[Linked Data \(From Records Linked to Sites\)](#)

# Linked Record (XRef) List View

In the Record Hierarchy tree, when a node labeled with a module name is selected, a List View of records linked from that module will display.

The List View for linked records is also referred to as an [XRef List View](#).

## List View Toolbar for Linked Records

The available actions in a List View of linked records varies for each module.

| Option  | Examples   |
|---|--|
| <b>Open</b> selected/ <b>Open All</b> linked records in another module              | All linked record (XRef) List Views  |
| <a href="#">Batch Update field in linked records</a> (not available in all modules) | Exhibitions > Objects  |
| <b>Add/Remove</b> record from a category  | Exhibitions > Objects: Remove Object from Exhibition<br><br>Exhibitions > Loans > Incoming Loans: Add Loan Objects to Exhibition, Remove Loan Objects from Exhibition<br><br>Exhibitions > Content Layout > layout: Objects included in this section, Objects excluded from this section |
| <b>Download</b> linked records to an EXCEL spreadsheet                              |  |

# Link Object Records in the Object Working List

In all modules *except* Objects, Constituents, and Crates, Object records contained in an [Object Working List](#) may be linked to the current record.

1. In the [Record Hierarchy Tree](#), select the Objects node option **Add Object Working List Items to (module name)** or **Add Object to (module name) from Object Working List** or **Add Object(s) in the Object Working List** or **Link Object using Working List**. A pop-up opens that contains a list of all objects in the user's Object Working List.
2. To link all records, select **Add All**. Or, to link only selected records, use the checkboxes to select the object(s) and choose **Add Selected**.
3. Answer **Yes** to the prompt. The Object(s) will be linked to the current record.

# Link Records in a Package

In all modules *except* Objects, Constituents, and Crates, Object records contained in a Package may be linked to the current record.

1. In the [Record Hierarchy Tree](#), select the Objects node option **Add Object(s) to (module name) using Package, Link Object using Package, or Add Object to (module name) from Package**.
2. The Package Search pop-up opens. [Search for a package](#).
3. Select a package in the grid.
4. Select **Open Package**. A pop-up will open that contains a list of all Object records in the package.
5. To link all records, select **Add All**. Or, to link only selected records, use the checkboxes to select the object(s) and choose **Add Selected**.
6. Answer **Yes** to the prompt. The Object(s) will be linked to the current record.

# Associate (Link) Records from the Same Module

An **Association** is a link between two records in the same module. TMS Collections has two types of associated record relationships: **Parent-Child** and **See Also**.

## Associated Relationships

### Parent-Child

In a Parent-Child relationship, a single Parent record is related to one or more Child records.

In a Child-Parent relationship, a single Child record is related to one or more Parent records.

An example is a portfolio of prints, where the portfolio is the Parent Object record, and each print is a Child Object record.

A Child may have multiple Parent records, each with a different Relationship Type.

A Parent may have Children with different Relationship Types.

### See Also

In See Also relationships, two records are linked together because of a commonality, such as depicting the same subject matter.

All relationships are configured in the [Relationships Authority](#).

## Associate the Current Record with a Record in the Same Module

1. In the current record, select the Record Hierarchy Tree node labeled with the Relationship Type for the two records. If there are no Associations for the Relationship Type, select the top node of the tree.
2. Select the node action **Link Related Record**. The Link Related pop-up opens.
3. Provide or select the required information.
4. Select the **Relationship Type**: Parent, Child, See Also. The Relationship Name configured for the selected type will become available.
5. Select the **Relationship Name**.
6. Select **Lookup** to select an existing record, or select **New** to create a new record where available.
7. If **New** is selected, follow the steps in [Add a New Record to Link](#).
8. If **Lookup** is selected, perform a [Quick Search](#) for a record to Associate. Instead of a List View Preview, a list of records will display in a selection grid. Choose one or more records and then select **Add**.

The newly Associated record will display when the node labeled with the Relationship Type is selected.

## Remove the Association to another record.

1. In the current record, select the node for which an Association should be removed (Parent, Child or See Also). A List View containing associated records displays in the center panel of the page.
2. Select the records to be un-associated.
3. Select the **three dot (...)** option above the List View and choose **Remove selected (association type) record(s)**.

For security settings, see **Associating Records** on the [Special Functions Security](#) page.

# Navigation in a Record Selection

Navigation through a selection (or set) of records can be performed several ways: using the **Navigation bar**, the **Record Set tab**, or by **record selection** in Light Box or List display mode.

## Navigation Bar

In the [Navigation bar](#), there are two methods to navigate to another record: navigation arrows or entering the record position number

## Navigation Arrows

Select a **navigation arrow** to open either the next (>), previous (<), first (<<) or last (>>) record in the current record selection.

## Record Counter

Enter a specific *order position number* in the **Record Counter** to open the record that is in a specific location in the record selection. In a set of 150 records, entering 149/150 will navigate to the next to last record.

In [Data Entry display mode](#), the new record will open in a [Data Form \(Data Entry View\)](#).

In [List display mode](#), the new record will become selected and highlighted in the list.

In [Light Box display mode](#), the new record will become highlighted.



When navigating through a set of records in Data Entry display mode, the top node of the Record Hierarchy Tree will be selected by default, regardless of the tree node that was selected for the previous record.

## Record Set Tab

Navigation using the Record Set tab is only available in Data Entry display mode.

1. In the left pane in the [Record Hierarchy Tree](#), select the Record Set tab. A list of the records in the current set will display in the panel.
2. Select a record in the list. It will open in Data Entry display mode.

## Selecting a Record in List or Light Box Display Mode

1. Select a record in the list or selection.
2. It will become "selected" (or highlighted).
3. If Data Entry display mode is then selected, the new record will open in a Data Form.

## Navigate to Linked or Associated records

In any open record, navigation can be performed to records that are related or associated to the current one.

Navigation can be performed two ways: using the [Related Toolbar](#) option or opening the records in a [List View](#).

# Open Related Records from a List View

In a record, when the selected node in the [Record Hierarchy Tree](#) displays linked records in a [List View](#), the **Open** or **Open All** options navigates to the linked records.

This option is available for records linked from the same module (Associated records) or from a different module (Related records).

1. In the Record Hierarchy Tree, select a node labeled with the module name, or for Associated records, the Relationship Type. A List View of records will display on the right.
2. In the List View toolbar, select **Open Selected** (if any rows are checked) or **Open All**. The record(s) in the list will open, replacing the current selection.

# Open Related Records Using the Toolbar

The Related option in the toolbar will navigate to records related to either the current record or the entire record selection.

This is similar to opening linked records from a List View, but offers the additional option of opening records linked to the entire record selection.

Refer to each module's page for options.

[Related Records Toolbar Option \(Objects\)](#)

[Related Records Toolbar Option \(Media\)](#)

[Related Records Toolbar Option \(Constituents\)](#)

[Related Records Toolbar Option \(Exhibitions\)](#)

[Related Records Toolbar Option \(Loans\)](#)

[Related Records Toolbar Option \(Sites\)](#)

[Related Records Toolbar Option \(Crates\)](#)

[Related Records Toolbar Option \(Bibliography\)](#)

[Related Records Toolbar Option \(Events\)](#)

[Related Records Toolbar Option \(Insurance Policies\)](#)

[Related Records Toolbar Option \(Shipments\)](#)

# Navigation to a Different Record Selection

In TMS Collections, [navigation](#) to different records can be performed several different ways.

Records open in their corresponding module. Opening new records will change the module if the new records are in a different module than currently open records.

- [Search for a Record](#)
- [Add a New Record](#)
- Open Object records from the [Object Working List](#) (available only in Objects module)
- Open Media records from the [Media Working List](#)
- Open records from a [Package Folder](#) or the [Package Panel](#)
- Open linked or associated records from a List View in the [Record Hierarchy Tree \(All Modules\)](#)
- [Navigate to Linked or Associated records](#) using the Related Records toolbar option

# Lookups

Throughout TMS Collections, when a search is required for a record in order to populate a field, or to link an existing record, a Lookup is performed.

A Lookup is a search for information to perform a task. It is not a search for records to open.

Below is a list of types of Lookups. This list is not comprehensive - it is to distinguish the different ways to find information.

## Constituent Search > Suggestions

- [Linked Constituent References \(ConXRefs\)](#) widget

## Thesaurus Lookup > Expandable List

- [Content Layout and Location Layout](#) widgets
- ThesXRefs widgets ([Attributes](#), [Statuses](#))

## Link a Record > Quick Search

- [Linked Media References \(MediaXRefs\)](#) widget: Link existing Media record
- [Objects/Constituents/Media/Bibliography](#): Link related record

# Generate Task Reports

Additional content will be provided in a future release.

The **Task Report** button is used to generate a report of tasks performed in TMS Collections.

## Task Report Filters

| Filter           | field type      | Selections   |
|------------------|-----------------|--|
| User             | dropdown list   | All configured TMS Collections users, including "(not specified)"  |
| Status           | dropdown list   | Done, Done with errors, Failed, In progress, Initialized, Initializing, Not defined  |
| Task Type        | dropdown list   | (not specified), Batch Link Constituent, Component move, Copy record, Digital assets validation, File management - move between folders, File system cache, Process offline folders, Process online HTTP folders, Process physical media records, Scheduled digital asset downloads, Scheduled reports |
| Start Date range | calendar /input |  |
| End Date range   | calendar /input |  |
| Scheduled        | checkbox        |  |

## Task Details

|                       |  |
|-----------------------|--|
| Filter by Item Status | (not specified), Marked for processing, Unprocessed, Processing, Done, Failed, Not available, Not authorized |
| Item                  |  |
| Status                |  |
| Status Details        |  |

# Reports (Crystal or SSRS)

*Content will be provided in a future release*

# Copy a Record

This feature is currently only available in the Objects module. See [Copy Object Record](#).

# How to use Collections for Object Workflows

In TMS Collections, every module has similar capabilities for creating, linking, and managing records.

The Objects module is where object-specific workflows are performed: **Accessioning**, **Registration**, **Cataloguing**, and **Deaccessioning**.

TMS Collections provides a set of system [Data Forms \(Data Entry Views\)](#) that are geared toward these workflows. Additionally, custom forms can be created in [TMS Composer](#) to suit specific workflows, or to combine workflows.

Cataloging and Accessioning fields are in the root context of the Objects module (by selecting the top node of the Objects Hierarchy Tree) and accessed in [Data Forms \(Data Entry Views\)](#).

Deaccessioning-related tasks and fields are accessed in the [Deaccessions alternate hierarchy tree](#).

Conservation data is accessed in the [Conservation alternate hierarchy tree](#).

# Modules

TMS Collections organizes records into Modules which represent a different categories of collection-related data.

Functions such as adding, deleting, and editing records are performed similarly in all Modules.

The current module is identified in the [Module banner](#) on the top left of the page.

## Available modules

| Module                             | Type of information/Use of information  |
|------------------------------------|---|
| <a href="#">Objects</a>            | items in an institution's collection or care: physical or digital items, or conceptual entities |
| <a href="#">Constituents</a>       | individuals, businesses, or entities that are linked to other records in TMS in Collections     |
| <a href="#">Media</a>              | digital assets and physical media   |
| <a href="#">Exhibitions</a>        | planning, organization and management of Exhibitions  |
| <a href="#">Loans</a>              | tracking and management incoming and outgoing Loans of Objects.                                 |
| <a href="#">Shipping</a>           | tracking of shipments of Objects coming to or leaving from an institution.                      |
| <a href="#">Crates</a>             | tracking of an Object's movement in a container   |
| <a href="#">Bibliography</a>       | bibliographic references related to an institution, such as an exhibition catalogue             |
| <a href="#">Events</a>             | public and internal events at an institution  |
| <a href="#">Sites</a>              | current or historical locations, such as the site of an excavation, or an ancient site.         |
| <a href="#">Insurance Policies</a> | insurance policies, such as blanket policies or federal indemnity policies                      |

# Contexts within each module

In each module, data is assigned to different categories, or contexts.

The main record in a module is always the root (main) context. Data which is considered a sub-category of the main record will be in a sub-context.

Some fields in contexts other than the main record may be accessed in the root (main) context, but others may require the selection of a different node in the [Record Hierarchy Tree](#).

# Objects

The **Objects** module contains the cataloguing information about items in a collection. Object records can be created to represent both physical and digital artwork, as well as virtual objects and conceptual entities. They can also be non-collections items associated with an object's display or care.

Beyond capturing basic tombstone data, such as title, artist, and date, each Object record contains fields for information about [acquisition and accessioning](#), [rights & reproductions](#), [valuation & insurance](#), [location](#), and [deaccession & disposal](#) as a few examples. The Objects module also contains an [Audit Trail](#) feature, which tracks changes made to Object record data.

A list of the fields available for viewing or editing in the Objects module is in [Object Data](#).

The [Objects Hierarchy Tree](#) provides a hierarchical view of an Object record, and has functionality for adding data and linking and associating other records.

# Object Data

**Object** records have many categories of data directly related to the Object itself. The core Object data is divided into the main (or module-level) [context](#), and multiple sub-categories, or sub-contexts.

The different contexts of an Object record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#), a specific tree node, or an alternate tree layout.

## Object Contexts

| Context   | Node or Tree                                 | Fields available in Data Form   |
|---|--|---|
| <a href="#">Main Object Record</a>                | Top node                                     | Data in the main Object record and some sub-categories  |
| <a href="#">Components</a>                        | Components node                              | Component-related fields  |
| <a href="#">Deaccessions</a>                      | Deaccessions alternate Record Hierarchy Tree | Deaccession-related fields  |
| <a href="#">Object Geography</a>                  | Geography node                               | Geography fields  |
| <a href="#">Location History</a>                  | Location History node                        | Location-related fields   |
| <a href="#">Valuations</a>                        | Valuations node                              | Insurance Value-related fields  |
| <a href="#">Linked records from other modules</a> | Node labeled with module name                | Fields related to the link between the records; in some cases, the linked record itself may be edited   |
| <a href="#">Associated Object Records</a>         | Node labeled with relationship name          | Fields related to the relationship; for each type of relationship, records are in a read-only List View |

In some Object contexts, on the Data Form, there are widgets that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseumLookup](#)). These widgets are not included on any fields lists since they are not part of any record.

# Main Object Record

The main Object record is accessed by selecting the top node of the [Objects Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the available fields belong to sub-categories, or sub-contexts of Objects, but do not require the selection of a separate node or tree. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

## Object Record Fields

| Field                                 | Description  | Object Process               | Context             | User Defined? | Authority Controlled? | On System Data Form? |
|---------------------------------------|--|------------------------------|---------------------|---------------|-----------------------|----------------------|
| <a href="#">Alternate Object Name</a> | Alternative name(s) that may be used for an Object.  | Cataloguing                  | Object Names        |               | No                    | Yes                  |
| <a href="#">Alternate Numbers</a>     | Alternate number(s) associated with an Object, such as a lender's number or a previous Object Number.  | Accessioning,<br>Cataloguing | Object AltNums      |               | No                    | Yes                  |
| Accession Date                        | The date that an Object was accessioned by an institution. The legal date of custody.  | Accessioning                 | Object Accession    |               | No                    | Yes                  |
| Accession Value                       | An Object's value at the time of accessioning (acquisition). Only one value may be recorded in this field, and it will not be visible in the Object Valuation Node, nor in the Loans, Shipping, or Insurance Policies modules. | Accessioning                 | Object Accession    |               |                       | Yes                  |
| Accession Method                      | How an Object was accessioned, such as by purchase, gift, or bequest.  | Accessioning                 | Object Accession    |               | Yes                   | Yes                  |
| Accountability                        | Indicates an accountability for the Object record being viewed.  |                              |                     |               | No                    | No                   |
| Acquisition Justification             | The reason for initiating the acquisition of an Object.  | Accessioning                 | Object Accession    |               | No                    | Yes                  |
| Acquisition Lot                       | The acquisition lot number in which an object was included.  | Accessioning                 | Object Accession    |               | No                    | Yes                  |
| Acquisition Number                    | Temporary Receipt Number for an incoming Object.   | Accessioning                 | Object Accession    |               | No                    | Yes                  |
| Acquisition Terms                     | Legal terms for the acquisition of the Object (e.g., specific terms of a partial or promised gift). Special terms related to an acquisition.   | Accessioning                 | Object Accession    |               |                       | Yes                  |
| Agreement Received                    | The date that a copyright agreement for an Object was received.  | Cataloguing                  | Object Rights       |               | No                    | Yes                  |
| Agreement Sent                        | The date that a copyright agreement for an Object was sent.  | Cataloguing                  | Object Rights       |               | No                    | Yes                  |
| Agreement Signed                      | The date that a copyright agreement for an Object was signed.  | Cataloguing                  | Object Rights       |               | No                    | Yes                  |
| Annotation ID                         | The primary Media thumbnail image for this Object.   | Cataloguing                  |                     |               |                       | Yes                  |
| Approval Date 1                       | The date that an approval in the accessioning process for a registration set of Objects was granted, such as a subcommittee approval date.   | Accessioning                 | Object Accession    |               | No                    | Yes                  |
| Approval Date 2                       | The date that an approval in the accessioning process for a registration set of Objects was granted, such as a curatorial approval date.   | Accessioning                 | Object Accession    |               | No                    | Yes                  |
| Approval Date 3                       | The date that an approval in the accessioning process for a registration set of Objects was granted, such as a collections committee approval date.  | Accessioning                 | Object Accession    |               |                       | Yes                  |
| <a href="#">Attributes</a>            | Thesaurus controlled terms linked to an Object.  | Cataloguing                  | Objects > ThesXRefs |               | Yes                   | Yes                  |
| AuthorityID 06 -> AuthorityID 80      | Customizable Authority-controlled fields. Configured in the <a href="#">TMS Suite Application Configuration Utility</a>  |                              |                     |               |                       | No                   |
| Authorization Date                    | Date that an acquisition was authorized  |                              | Object Accession    |               |                       | Yes                  |

|  |  |                           |                          |  |     |     |
|--|--|---------------------------|--------------------------|--|-----|-----|
| Bibliography                                       | A list of bibliographic references in which an Object has been included. <b>Note:</b> Data entered into this field is free text and not related to any other records. However, if a bibliographic reference has its own Bibliography record, then that record may be linked to the Object instead of being specified in this field |                           | Object Bibliography      |  |     | No  |
| Capital Program                                    | Refers to long-term plan involving funding   |                           | Object Accession         |  |     | No  |
| Catalogue Date                                     | The date that an Object record was catalogued.   |                           | Object Context           |  |     | Yes |
| Catalogue Raisonné                                 | Information about how an Object relates to an artist's catalogue raisonné.   |                           | Objects                  |  |     | Yes |
| Cataloguer   | Name of person who entered data in the record.   | Cataloguing               | Objects                  |  |     | Yes |
| Classification                                     | A broad category for an Object, such as Painting, Sculpture, or Photograph.  |                           | Objects /Classifications |  | Yes | Yes |
| Contract Number                                    | An identifying number for an Object's copyright license or contract.   |                           | Object Rights            |  |     | No  |
| Object Related Constituent Xrefs (ConXRefs)        | Constituent records linked to the Object with an Artist/Maker-related role, such as Artist or Author. Records are linked and displayed in the ConxRefs widget labeled <i>Object Related Constituent Xrefs</i> .  | Accessioning, Cataloguing | Objects /ConXRefs        |  |     | Yes |
| Acquisition Related Constituent Xrefs (ConXRefs)   | Constituent records linked to the Object with an Acquisition-related role, such as Donor or Dealer. Records are linked and displayed in the ConxRefs widget labeled <i>Acq. Related Constituent Xrefs</i> .  | Accessioning, Cataloguing | Objects /ConXRefs        |  |     | Yes |
| Ex-Collection Related Constituent Xrefs (ConXRefs) | Constituent records linked to the Object with an Ex-Collection-related role, such as Previous Owner or Collector. Records are linked and displayed in the ConxRefs widget labeled <i>Ex-Coll. Related Constituent Xrefs</i> .  | Accessioning, Cataloguing | Objects /ConXRefs        |  |     | Yes |
| Rights Related Constituent Xrefs (ConXRefs)        | Constituent records linked to the Object with a Rights-related role, such as Rights Holder or Executor of Estate. Records are linked and displayed in the ConxRefs widget labeled <i>Rights Related Constituent Xrefs</i> .  | Accessioning, Cataloguing | Objects /ConXRefs        |  |     | No  |
| Copyright  | Owner of copyright and contact information   | Cataloguing               | Object Rights            |  | No  | Yes |
| Copyright Registration Number                      | The copyright registration number issued by the government for an Object.  | Cataloguing               | Object Rights            |  | No  | No  |
| Credit Line  | Credit information related to the accessioning of an Object, such museum purchase, bequest, or gift from a donor.  | Cataloguing               | Object Rights            |  |     | Yes |
| Culture  | The culture of the creator of an object, such as Akan, Bali, or Javanese. Helpful for unknown creators.  | Cataloguing               | Object Context           |  | No  | Yes |
| Curator  | Name of the curator responsible for the cataloging of an Object record.  | Cataloguing               | Objects                  |  |     | Yes |
| Curator Approved                                   | Indicates that an Object record has been approved by a curator.  | Cataloguing               | Objects                  |  | No  | Yes |
| Curator Revision Date                              | The date that any information in the Object record was revised by the curator responsible for that Object.   | Cataloguing               | Objects                  |  | No  | Yes |
| Curatorial remarks                                 | Remarks provided by a curator about the Object.  | Cataloguing               | Objects                  |  |     | Yes |
| Current Percent Ownership                          | The current percentage of the object that is owned by the institution.   |                           | Object Accession         |  |     | Yes |
| Date   | The creation date of an Object that is used for display or publication.  |                           |                          |  |     | Yes |
| Date Begin   | The first year date of a date range used for searching. Can be entered as year, month and year, or day, month, and year.   |                           |                          |  |     | Yes |
| Date End   | The last year date of a date range used for searching. Can be entered as year, month and year, or day, month, and year.  |                           |                          |  |     | Yes |
| Deed of Gift Received                              | The date on which the Deed of Gift was received.   | Accessioning              | Object Accession         |  |     | Yes |

|                                 |   |                           |                          |     |    |     |
|---------------------------------|---|---------------------------|--------------------------|-----|----|-----|
| Deed of Gift Sent               | The date on which the Deed of Gift was sent.  | Accessioning              | Object Accession         |     |    | Yes |
| Department                      | The department to which an Object is assigned. Module departments control security and serve as the highest categorical level for records in each module. Departments are managed in the <a href="#">Departments Authority</a> .  |                           |                          |     |    | Yes |
| Dimensions                      | Measurements for each type of an Object's dimensions. Entered and organized in the <a href="#">Dimensions</a> widget.   | Cataloguing               | Objects                  |     |    | Yes |
| Dimensions Label                | The Object Dimensions Label created in the Dimensions widget. May be entered as free text, or generated by the Dimensions widget which will combine selected Dimensions.  | Cataloguing               |                          |     |    | Yes |
| Dynasty                         | A historical dynasty in which an Object was created, such as Ming Dynasty.  | Cataloguing               | Object Context           |     |    | No  |
| Edition                         | The number of an Object in the total number created at one time, such as 15 /500.   | Cataloguing               | Objects                  |     |    | Yes |
| Effective Date                  | The date that a date entry went into effect.  | Cataloguing               | Objects                  |     |    | Yes |
| Exhibition History              | A list of exhibitions in which an object has been included. <b>Note:</b> Data entered into this field is free text and not related to any other records in TMS. Preferably, the Exhibitions module be used to record exhibition history for objects.  | Cataloguing               | Objects                  |     |    | No  |
| Expiration Date                 | The date that a copyright agreement for an object expires.  | Cataloguing               | Object Rights            |     |    | No  |
| Flag 9, 13-20                   | An Object-related checkbox field that may be configured for customized usage. Configured in the <a href="#">TMS Suite Application Configuration Utility</a>   | Cataloguing               | Object Context           |     |    | No  |
| Flag 12                         | An Object-related checkbox field that may be configured for customized usage. Configured in the <a href="#">TMS Suite Application Configuration Utility</a> Was formerly <i>microclimate</i>  | Cataloguing               | Object Context           |     |    | No  |
| Flex Fields (ungrouped)         | Flex fields widget are "flexible" or user-created fields that are <a href="#">configured</a> in the <a href="#">TMS Suite Application Configuration Utility</a> . All ungrouped flex fields for an Object record display together in a "container."   | Accessioning, Cataloguing | Objects /UserField XRefs |     |    | No  |
| Flex Fields (grouped)           | Flex fields widget are "flexible" or user-created fields that are <a href="#">configured</a> in the <a href="#">TMS Suite Application Configuration Utility</a> . <b>Grouped</b> flex fields are related and can include workflow and approval information. A flex field group displays in its own container. | Accessioning, Cataloguing | Objects /UserField XRefs |     |    | No  |
| <a href="#">Geography Xrefs</a> | Thesaurus controlled geographical terms linked to an Object, such as a creation site or place depicted.   | Cataloguing               |                          |     |    | Yes |
| Historical Attributions         | Information about the person (or persons) formerly attributed to be the artist for an object.   | Cataloguing               | Objects                  |     | No | No  |
| Historical Date                 | Table containing all historical dates for the Object. Comprised of Begin Date, End Date, and Display Date.  | Cataloguing               |                          |     |    | Yes |
| Initiation Date                 | date for initiation of the acquisition of the Object  | Accessioning              | Object Accession         |     |    | No  |
| Inscription (s)                 | Any inscriptions found on the object.   | Cataloguing               |                          |     |    | No  |
| Integer 1 - 4                   | An Object-related numeric field that may be configured for customized usage. Configured in the <a href="#">TMS Suite Application Configuration Utility</a>  | Cataloguing               | Object Context           | Yes |    | No  |
| ISO Date 06                     | An Object-related date field that may be configured for customized usage (was formerly Publication Date)  | Cataloguing               | Object Context           | Yes |    | No  |
| ISO Date 01                     | An Object-related date field that may be configured for customized usage  | Cataloguing               | Object Context           | Yes |    | No  |
| Keyword Search                  | Terms that can be used as search values when performing searches for specific Object records  | Cataloguing               | Object Context           |     |    | No  |
| Label Text                      | Descriptive text to be used for display purposes. Text in this field populates Data Views seen in other areas, such as the Label Copy and List with Images Views, and Object Packages. If this field is empty, text from the Description field will be used instead.  | Cataloguing               | Objects                  |     | No | No  |
| Loan Class                      | Indicates an object's availability for loaning purposes as set by an institution.   | Cataloguing               | Objects                  |     |    | No  |
| Long Text 05                    | An Object-related long-text field that may be configured for customized usage. Configured in the <a href="#">TMS Suite Application Configuration Utility</a>  | Cataloguing               |                          |     |    | No  |
| Long Text02                     | An Object-related long-text field that may be configured for customized usage. Configured in the <a href="#">TMS Suite Application Configuration Utility</a>  | Cataloguing               |                          |     |    | No  |
| Mark(s)                         | Any marks and stamps on an Object, such as a manufacturer's mark.   | Cataloguing               | Objects                  |     |    | Yes |

|                        |   |              |                              |  |     |     |
|------------------------|---|--------------|------------------------------|--|-----|-----|
| MediaXRefs             | Media records linked to the Object. Records are linked and displayed in the MediaXRefs widget.  | Cataloguing  | Objects /MediaXRefs          |  |     | Yes |
| MediaXRefs - Accession | Media records linked to the Object. This is simply the MediaXRefs widget configured for a different context   | Accessioning | Object Accession /MediaXRefs |  |     | Yes |
| Medium                 | The medium, technique, or process used in the object's creation. May be configured as free text or structured data in which case Thesaurus terms are linked.  | Cataloguing  | Objects                      |  |     | Yes |
| Movement               | The name of an art movement with which an object is associated, such as Impressionism or Surrealism.  | Cataloguing  | Object Context               |  |     | No  |
| Nationality            |   | Cataloguing  | Object Context               |  |     | No  |
| Negative               |   | Cataloguing  | Objects                      |  |     | No  |
| Notes                  | Notes about an object.  | Cataloguing  | Objects                      |  | No  | Yes |
| Object Count           | The number of physical objects contained in an Object record.   | Cataloguing  | Objects                      |  |     | Yes |
| Object Name            | A descriptive or common name for an object where a title is not available or may not be appropriate, such as a name for a geological specimen. Alternate Object Names may be added as well.   | Cataloguing  | Objects                      |  | No  | Yes |
| Object Titles          | The title of an object created in the Object Titles widget. An Object may have multiple Titles.   | Cataloguing  | Object Titles                |  | No  | Yes |
| Object Level           | The level of an object in relation to the Object record, such as Whole object, or Part of an object.  |              | Object Level                 |  | Yes | No  |
| Object Status          | The legal status for the object at the time of accessioning (e.g., <i>Accessioned object, Long-Term Loan, Loan In, Deaccessioned, Temporary custody</i> ).  | Accessioning |                              |  | Yes | Yes |
| Object Type            | The type of object, such as ethnographic, archeological, or specimen.   | Cataloguing  | Object Type                  |  | Yes | Yes |
| Object Right Type ID   | For example, Exclusive, Non-Exclusive, Public Domain, etc.  | Cataloguing  |                              |  |     |     |
| On View                | Used to manually indicate if an object is on view. Preferably, an object's current location is used to indicate whether or not it is on view.   | Cataloguing  | Objects                      |  |     | Yes |
| Packing Requirements   | Any packing requirements for the Object.  | Cataloguing  | Object Context               |  |     | No  |
| Paper File Reference   | A list of in house reference material related to an Object.   | Cataloguing  | Objects                      |  |     | No  |
| Paper /Support         | The paper or support associated with an Object.   | Cataloguing  | Objects                      |  |     | No  |
| Period                 | A historical period in which the object was created.  | Cataloguing  | Object Context               |  |     | Yes |
| Portfolio /Series      | The portfolio or series title to which an object belongs.   |              |                              |  |     | No  |
| Provenance             | The record of ownership of an object. Note that ex-collection related constituents can be linked to an Object record as well.   | Cataloguing  | Objects                      |  |     | No  |
| Public Access          | Indicates if an Object record is approved for use on the institution's website.   | Cataloguing  | Objects                      |  |     | Yes |
| Published References   | A list of published references in which an object has been included. Note: Data entered into this field is free text and not related to any other records in TMS. If the publication is for an exhibition catalogue, or a publication in which multiple objects in your collection are being cited, it is recommended that you track this information in a related Bibliography record. | Cataloguing  | Objects                      |  |     | No  |
| Reign                  | A historical reign in which an object was created, such as Hadrian, or Louis XIV.   | Cataloguing  | Object Context               |  |     | Yes |
| Related Works          | A list of other objects to which the object is related. <b>Note:</b> Data entered into this field is free text and not related to any other records in TMS. Preferably, related Object records should be linked together if they are available in TMS.  | Cataloguing  | Objects                      |  |     | No  |
| Remarks                | Any remarks about the citation of a linked object in a publication (each linked Bibliography record).   | Cataloguing  |                              |  |     | Yes |
| Restrictions           | Any restrictions related to the Object (such as, internal use only, no web use, etc.).  |              | Object Rights                |  |     |     |

|                                |   |                              |   |     |  |     |
|--------------------------------|---|------------------------------|---|-----|--|-----|
| School                         | The name of an artistic school with which an object is associated, such as Bauhaus or Hudson River School.  | Cataloguing                  | Object Context                            |     |  | Yes |
| Secondary Object Number        | An additional number associated with the Object.  |                              | Objects                                   |     |  | No  |
| Short Text 05-09               | An Object-related short-text field that may be configured for customized usage. Configured in the <a href="#">TMS Suite Application Configuration Utility</a>   |                              | Objects                                   |     |  | No  |
| Signed                         | Signature information for an object, such as an artist's name.  | Cataloguing                  | Objects                                   |     |  | No  |
| Single-Value Text Entries      | A text entry that functions as a web application field.   | Accessioning,<br>Cataloguing | Objects                                   |     |  | No  |
| Sort Number 2                  | An Object-related field that may be configured for customized usage. Configured in the <a href="#">TMS Suite Application Configuration Utility</a>  |                              | Objects                                   |     |  | No  |
| Source                         | The source of an object. This can be used for notes that are not appropriate to put in the credit line.   | Accessioning                 | Objects                                   |     |  | No  |
| State/Proof                    | The state or proof of an object before it is finished, such as an artist's proof.   | Cataloguing                  | Objects                                   |     |  | No  |
| Status Flags                   | Short text alerts entered for an object.  | Cataloguing                  | Objects /Status Flags                     |     |  | No  |
| Style                          | An artistic style associated with an object, such as Cubism or Fauvism.   | Cataloguing                  | Object Context                            |     |  | No  |
| Suggested Accession Value Date | The date that corresponds with the suggested accession value for an object.   | Accessioning                 | Object Accession                          |     |  | No  |
| Suggested Object Number        | A suggested Object Number for an object.  | Accessioning                 | Object Accession                          |     |  | No  |
| Text Entries                   | Text Entries about an Object, such as a web chat or research notes.   | Cataloguing                  | Objects /Text Entries                     | YES |  | Yes |
| Text Entries (Accessioning)    | Text Entries about an object, such as a web chat or research notes. This is simply the the <a href="#">Text Entries</a> widget configured for a different context.  | Accessioning                 | Objects /Object Accessioning/Text Entries | YES |  | Yes |
| Text Entries (Handling Notes)  | Text Entries about an object, such as a web chat or research notes. This is simply the the <a href="#">Text Entries</a> widget configured for a different context.  | Cataloguing                  | Objects /Object Context /Text Entries     | YES |  | No  |
| Text Entries (Rights-related)  | Text Entries about an object, such as a web chat or research notes. This is simply the the <a href="#">Text Entries</a> widget configured for a different context.  | Cataloguing                  | Objects /Object Rights /Text Entries      | YES |  | No  |
| Text Entries (Translations)    | <i>Content will be provided in a future release.</i>  |                              |   |     |  | No  |
| User Date 1 - 4                | An alternate date field for an Object record. May be relabeled for specific needs. Configured in the <a href="#">TMS Suite Application Configuration Utility</a>  | Cataloguing                  | Objects                                   |     |  | No  |
| User Number 1, 2, 4            | An alternate number for an Object Record when the number is currently in use. This field may be used to reference numbers specific to objects in a collection, such as plate numbers for Audubon prints. This field may be relabeled for an institution's specific needs. Configured in the <a href="#">TMS Suite Application Configuration Utility</a> |                              | Objects                                   |     |  | No  |
| Virtual Object                 | Indicates a virtual object. Virtual Objects are typically made from several other records, such as a portfolio, a table service, or a triptych.   | Cataloguing                  | Objects                                   |     |  | Yes |

# Object Components

Objects are made of one or more **Components**. By default, an Object has one Component with a Component Number the same as the Object Number.

[Additional Components](#) may be added to an Object.

Components are in the **Object Components context**, or sub-category.

Select the **Components node** in the [Objects Hierarchy Tree](#) to display a list of all Components for an Object.

Select an individual node labeled with the Component Number to display the [Component fields](#) in a [Data Form \(Data Entry View\)](#).

# Object Component Fields

In the Objects Hierarchy Tree, select an individual node labeled with the Component Number to display the fields below in a [Data Form \(Data Entry View\)](#).

| Field Name                    | Description  | User Defined | Authority Controlled? | On a System Data Form? |
|-------------------------------|--|--------------|-----------------------|------------------------|
| Component Barcode             | Unique barcode that is automatically generated when a component record is created.   |              |                       | Yes                    |
| Barcode input                 |  |              |                       | Yes                    |
| Box Number                    | An identifying number assigned to a box used or to be used for an object or component by preparators.  |              |                       | Yes                    |
| Component Number              | A number assigned to a component.  |              | No                    | Yes                    |
| Component Name                | A name assigned to a component.  |              | No                    | Yes                    |
| Object Component Type         | The relationship between the component and the object, either <i>Part of an object</i> or <i>Accessory</i> .   |              | Yes                   | Yes                    |
| Item Count                    | The number of items that are part of a single component.   |              | No                    | Yes                    |
| Department                    | The department to which a component is assigned. Module departments control security and serve as the highest categorical level for records in each module. Departments are managed in the <a href="#">Departments Authority</a> . |              |                       |                        |
| Dimensions                    | The physical dimensions of a component.  |              |                       |                        |
| Flex Fields                   | Flex Fields related to the component.  | Yes          |                       | No                     |
| Fumigation Comments           | General comments about the fumigation of the object component.   |              |                       |                        |
| Grouping                      | Any additional storage groupings.  |              |                       |                        |
| Group Type Place              | A location for a group type storage.   |              |                       |                        |
| Group Type                    | A way to group objects by the way in which they are stored as defined by an institution.   |              |                       |                        |
| Curator                       | The name of the curator of the department responsible for the grouping data.   |              |                       | Yes                    |
| Preparation Comments          | Notes about how a component should be prepared for storage, moving or shipping.  |              |                       |                        |
| In Jurisdiction               | Indicates if a component is in an institution's jurisdiction.  |              |                       |                        |
| Installation Comments         | Notes about how a component should be installed.   |              |                       |                        |
| Lot Number                    | A lot number for an object or component for storage purposes.  |              |                       |                        |
| MediaXRefs                    | Media records linked to the component.   |              |                       |                        |
| Mount With                    | The type of mount that should be used for the object.  |              |                       |                        |
| Object Group ID               | The group of objects.  | Yes          | Yes                   |                        |
| Physical Description (Search) | The description of the non-primary components.   |              |                       |                        |
| Ready for Exhibit             | Indicates whether or not the object is ready for exhibition.   |              |                       |                        |
| Ready for Storage             | Indicates whether or not the object is ready for storage.  |              |                       |                        |
| Received By                   | The name of the person that received an object or component into storage.  |              |                       |                        |
| Received Date                 | The date an object or component was received into storage.   |              |                       |                        |
| Search                        |  |              |                       |                        |
| Storage Comments              | Notes about how a component should be stored.  | No           | Yes                   |                        |
| Storage Format                | The format for storage (open storage, use slip sheet, etc.).   |              | Yes                   |                        |
| Storage Method                | The method used for storage (store flat, store in portfolio box, store matted, requires acid-free tissue paper, etc.).   |              | Yes                   |                        |

|                |   |  |    |  |
|----------------|---|--|----|--|
| ThesXRefs      | Thesaurus-controlled terms that are linked to the component.  |  |    |  |
| To Be Combined | Indicates whether or not the object can be combined with other objects (or components) in storage.                            |  |    |  |
| Active in TMS  | Indicates if a component is active. At least one component, typically the primary component record, must be marked as active. |  | No |  |

For security settings, see **Object Components** on the [Objects Module Security](#) page.

# Add/Delete/Edit/View an Object Component

## Add a Component to an Object

1. In the [Objects Hierarchy Tree](#), select the **Components node**.
2. Select the node option **Add Component**.
3. Enter values for the required fields: [Component Type](#) and [Component Number](#).
4. Select **Add**. The new Component record will open in a [Data Form \(Data Entry View\)](#).

## Delete a Component from an Object

1. In the [Objects Hierarchy Tree](#), select the **node** labeled with the **Component being deleted**.
2. Select the node option **Delete Component**. A usage report displays with counts of Location History and any linked records. If there are any blocking usages (in red), the Component cannot be deleted. Components linked to Shipment records cannot be deleted.
3. Select **Yes** to the prompt confirming the deletion. The Component record will be deleted, and will no longer display in the tree, and will not be included in the Components [List View](#).

## Edit/View Object Components

In the [Objects Hierarchy Tree](#), select the **node** labeled with the **Component Number**. The Object Component fields will display in a Data Form (Data Entry View).

For security settings, see **Object Components** on the [Objects Module Security](#) page.

# Component Location History

The Location History for an Object Component is available in the [Objects Hierarchy Tree](#) under **Object (top node) > Components > Component > Location History node**.

A preconfigured [List View](#) will display with fields related to the Location History of the Component.

## Location History Fields

| Field                         | Description   |
|-------------------------------|---|
| Transaction Date              | The date that a component was moved to a location.  |
| Transaction Code              | A code representing a Transaction Type.   |
| Transaction Type              | The type of movement that was made such as temporary move or return to home location.               |
| <del>Transaction Status</del> | <del>The status of the movement, such as scheduled, pending, or complete.</del>                     |
| Location                      | The location to which the component was moved (Locations Authority).                                |
| Container                     | The Crate that contains the Component. Corresponds to a Crate record, not a Location.               |
| Sub-level                     |   |
| Location Level                |   |
| Purpose                       | The reason why a component was moved to a location, such as for exhibition or examination.          |
| Approver                      | The person that approved that a component could be moved to a location.                             |
| Handler                       | The person that moved a component to a location.  |
| Requested by                  | The person that requested that a component be moved.  |
| Remarks                       | Notes associated with a movement of a component.  |
| Login ID (Entered by)         | The person that performed the move in Move Assistant (not the physical move itself)                 |
| Entered Date                  | The date that the Move was performed in Move Assistant.   |
| Anticipated End Date          | The date that a component is anticipated to leave a location.                                       |
| Actual End Date               | The date that a component actually left a location.   |
| Receipt Number                | A number assigned to a shipment that a component is part of as it enters or leaves the institution. |
| Shipping Details              | Any details associated with a component about shipping.   |

# Object Geography

Object Geography fields are in the **Object Geography context**, or sub-category.

Selecting the **Geography node** in the [Objects Hierarchy Tree](#) displays a list of all Geography Types assigned to an Object. Selecting an individual node labeled with a Geography Type will display its [Geography Fields](#) in a [Data Form \(Data Entry View\)](#).

For security settings, see **Object Geography** on the [Objects Module Security](#) page.

# Object Titles

Object Titles are added to Object records using the **Object Titles widget**. The widget can be used to add additional information about a title, add more title entries, and control how the title entries are displayed. Adding additional title entries may be useful for recording an original language title, a descriptive title, or a former title, as a few examples. These examples are *Title Types*, which accompany each title to provide context for each title entry. *Title Types* are managed in the [Other Authority](#).

Refer to [Configuring Standard Feature Widgets](#) for instructions on configuring the *Object Titles* widget on [Data Forms \(Data Entry Views\)](#).

In an Object record, Titles are displayed in a grid format. The number of title entries appear in parentheses next to *Title*. The following buttons are displayed in the upper right above the grid.

## Toolbar buttons:

| Button                | Icon  | Function   |
|-----------------------|---|--|
| Refresh               | Arrows in a circle  | Resets the widget so that it is no longer in Edit mode.                          |
| Add a New Title       |  | Create a new title.  |
| Edit a Title          | Pencil and paper  | Edit an existing title.  |
| Delete a Title        |  | Delete a title.  |
| Move Up and Move Down | Up and Down Arrows  | Use the move up and move down buttons to change the display order of the titles. |

## Object Title Fields

| Field          | Description  | Field Entry             | Authority Controlled? |
|----------------|--|-------------------------|-----------------------|
| Title          | A title for an object.   | Free text               | No                    |
| Title Type     | A type of title, such as primary title, original language title, or descriptive title.   | Text pull-down          | Yes                   |
| Language       | The language of the title.   | Text pull-down          | Yes                   |
| Remarks        | Any notes associated with the title.   | Free text               | No                    |
| Active         | Indicates whether or not a title is in active use.   | Checkbox                | No                    |
| Displayed      | Indicates whether or not a title should be displayed in <a href="#">Data Views</a> and reports that include additional titles. | Checkbox                | No                    |
| Effective Date | The date on which a title went into effect.  | Date pull-down or typed | No                    |

## Adding an Object Title

1. Navigate to the *Object Titles* widget on a [Data Form \(Data Entry View\)](#).
2. Select **Add**  in the upper right above the grid. The Edit window opens.
3. Enter data in the desired fields.
4. The *Active* and *Displayed* boxes are checked by default, uncheck the boxes if the title should not be active and/or displayed.

## Editing an Object Title

1. Select a title in the grid.
2. Select **Edit**.
3. The Edit window opens. Edit the desired fields.
4. Select **SAVE**.

## Deleting an Object Title

1. Select a title in the grid.
2. Select **Delete**  in the upper right above the grid. The title will be deleted.



Before editing or deleting a title, consider if it may be better to uncheck the *Active* box or select a different *Title Type* to retain the title for historical record keeping. In this case, the updated title information can be recorded in a new title entry instead.

## Title Display Order

1. Select a title in the grid.
2. Use **Move Up** or **Move Down** to move it to the preferred order.

For security settings, see **Object Titles** on the [Objects Module Security](#) page.

# Object Valuations

Valuations are performed on an Object for appraisals, purchase price, and insurance. Object Valuations that are created in the Object record are then available for selection in the Loans, Shipping, and Insurance Policies modules.

See [Loan Object Valuations](#), [Shipment Object Valuations](#), and [Insurance Policy Object Valuations](#) for more information on recording Object values in those modules.

Object Valuation fields are in the **Object Insurance context**, or sub-category.

Selecting the **Valuations node** in the [Objects Hierarchy Tree](#) displays a list of all Valuations for an Object. Selecting individual nodes labeled with the Local Value and Valuation Date displays the individual Valuation fields in a [Data Form \(Data Entry View\)](#).

# Add/Edit/Delete Valuations

## Add a New Object Valuation

1. Select the Object Valuation node in the [Objects Hierarchy Tree](#).
2. Select the node option **Add New Valuation**. The Add New Valuation window opens.
3. Enter data in desired fields. Use the [Valuation Widget](#) to calculate values.
4. Select **Add**. The valuation will be created and display in the tree under the Valuations node.

## Edit an Object Valuation

1. Select a specific Object Valuation node in the tree.
2. In the [Data Form \(Data Entry View\)](#) on the right, edit the desired fields. Use the [Valuation Widget](#) to calculate modified values.
3. [Save the changes](#).

## Delete an Object Valuation

Valuation records marked as the **Current Value** for the Object cannot be deleted.

1. Select a specific value under the Object Valuation node.
2. Select the **arrow** to the right of the value and choose **Delete**.
3. If the current valuation is the designated Current Value, a message will display that another valuation must be marked as the current value before the deletion can be performed. Select a different valuation record and select/check **Current Value**. Then repeat all steps.
4. A prompt opens asking if the selected records should be deleted. Select **Yes** to Delete or **No** to cancel.

For security settings, see **Object Value** on the [Objects Module Security](#) page.

# Object Valuation fields

| Object Valuation Fields | Description  | Authority Controlled? | On System Data Form (Data Entry View)? |
|-------------------------|--|-----------------------|--|
| Local Value*            | The Object value in the local currency. May be calculated by the Valuation widget.   | No                    | Yes                                    |
| Currency Value*         | The Object value in a currency other than the primary configured currency. May be calculated by the Valuation widget.  | No                    | Yes                                    |
| Currency*               | The currency related to the Currency Value.  | Yes                   | Yes                                    |
| Stated Date             | The date associated with the Stated Value.   | No                    | Yes                                    |
| Exchange Rate*          | The conversion rate between two currencies. May be calculated by the Valuation widget.   | No                    | Yes                                    |
| Exchange Rate Date      | The date associated with the Exchange Rate.  | No                    | Yes                                    |
| Appraiser               | The Constituent that assessed the Object value.  | Yes                   | Yes                                    |
| Valuation Purpose       | The reason for the valuation (appraisal, annual review, or insurance value).   | Yes                   | Yes                                    |
| Valuation Notes         | Any details about the valuation.   | No                    | Yes                                    |
| Is Current              | Indicates that the Valuation record is the current (primary) valuation for the Object<br><br><b>Note:</b> An Object can only have one current Valuation record. This field is deselected if it is selected in a different record. Valuation records entered through the Loans or Shipping modules cannot be marked as the current value. | No                    | Yes                                    |

\*These fields, with the exception of Current Value, are available in the [Valuation widget](#).

For security settings, see **Object Value** on the [Objects Module Security](#) page.

# Object Deaccessions

Deaccessioning tracks the deaccessioning or disposing of an object, and the use of any proceeds towards the accessioning of other objects.

Steps are provided in [Deaccession an Object](#).

Deaccession data is in the **Object Deaccession context** or sub-category. Selecting the **Deaccessions node** in the [Deaccessions Alternate Objects Hierarchy Tree](#) displays a list of all Deaccession records for an Object. Selecting individual nodes labeled with the Disposition Date displays the fields below in a [Data Form \(Data Entry View\)](#).

The fields below are for performing Deaccession functions.

## Object Deaccession Fields

| Field Name                                     | Description  | Authority Controlled?             | On a System Data Form (Data Entry View)? |
|--|--|-----------------------------------|--|
| Approval Date 1                                | The date of the first level of approvals for deaccessioning an object, such as when a curator recommends that an object should be deaccessioned.   | No                                | Yes                                      |
| Approval Date 2                                | The date of the second level of approvals for deaccessioning an object, such as when a committee recommends that an object should be deaccessioned.  | No                                | Yes                                      |
| Approval Date 3                                | The date of the third level of approvals for deaccessioning an object, such as when a director recommends that an object should be deaccessioned.  | No                                | Yes                                      |
| Disposition Date                               | The date that an object was deaccessioned or disposed.   | No                                | Yes                                      |
| Sale Reported Date                             | The date that the sale of a deaccessioned object was reported.   | No                                | Yes                                      |
| Disposition Method                             | The disposition method for a deaccessioned object, such as discarded, sold, or destroyed.  | Yes                               | Yes                                      |
| Auction house or transferee                    | Linked Constituent record for the person or entity to which the deaccessioned object was transferred.<br>Performs <a href="#">Constituent Lookup</a> .   | Yes                               | Yes                                      |
| <a href="#">Linked Constituents (ConXRefs)</a> | Linked Constituent records for the people or entities associated with the deaccessioning of an object. By default, Object Related and Acquisition Related Constituent records are linked when a Deaccession record is created. | Yes                               | Yes                                      |
| Low Estimate                                   | The lowest value of an object to be deaccessioned.   | No                                | Yes                                      |
| High Estimate                                  | The highest value of an object to be deaccessioned.  | No                                | Yes                                      |
| Net Proceeds                                   | The net amount of money received by an institution from deaccessioning an object.  | No                                | Yes                                      |
| Sale Date                                      | The date that a deaccessioned object was sold.   | No                                | Yes                                      |
| Sale Number                                    | The sale number for a deaccessioned object.  | No                                | Yes                                      |
| Lot Number                                     | The lot number for a deaccessioned object.   | No                                | Yes                                      |
| Contract Terms                                 | Any contractual terms for deaccessioning an object.  | No                                | No                                       |
| Deaccession Remarks                            | Any notes pertaining to the deaccession of an object.  | No                                | Yes                                      |
| <a href="#">Flex Fields</a>                    | Flex Fields related to the deaccession process for an object.  | Depends on configuration of field | No                                       |
| <a href="#">Linked Media (MediaXRefs)</a>      | Linked Media records related to the deaccession process for an object.   | Yes                               | Yes                                      |
| <a href="#">Text Entries</a>                   | Text Entries related to the deaccession process for an object.   | Depends on configuration of field | Yes                                      |
| <a href="#">Single-Value Text Entry</a>        | Single-Value Text Entries related to the deaccession process for an object.  | Yes                               | No                                       |

For security settings, see **Object Deaccessions** on the [Objects Module Security](#) page.

# Linked Data (From Records Linked to Objects)

In an Object record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Objects Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**. For linked Constituents, select the tree node labeled with the **Role Type**.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Constituent and Media records are also available in the [Main Object Record](#) in the [Linked Constituent References \(ConXRef\)](#) and [Linked Media References \(MediaXRef\)](#) widgets. Select the top tree node to access them.

## Link-Related Fields

When an Object is linked to records in other modules, information is generated that pertains to the link.

The following fields pertain to the *link* between an Object record and a record from another module. These fields are not part of either the Object record or the linked record, and only exist when the records are linked.

- [Linked-Bibliography Data](#)
- [Linked-Event Data](#)
- [Linked-Constituent \(ConXRef\) Data](#)
- [Linked-Media \(MediaXRef\) Data](#)
- [Site-Object Data](#)
- [Exhibition-Object Data](#)
- [Venue-Object Data](#)
- [Loan-Object Data](#)
- [Insurance Policy-Object Data](#)
- [Shipment-Object Data](#)

# Associated Object Records

See [Associate \(Link\) Records from the Same Module](#).

# Objects Hierarchy Tree

The main **Objects Hierarchy Tree** provides access to all [core Object data](#), including data that is linked from other modules. It is labeled **Objects (complete)**.

The data that displays in the center panel is determined by the tree node that is selected. The main Object record is represented in the top node, with child nodes representing modules or types of Object data. Some child nodes have their own child nodes for individual records.

In addition to the main tree layout, there are alternate hierarchy tree layouts available: [Conservation](#), [Deaccession](#), and [Audit Trail](#).

## Objects Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Objects Hierarchy Tree Layout

### Object Number (top node)

#### Components

Component Number

Component Location History

#### Valuations

(Local Value + Stated Date + Appraiser)

#### Insurance Policies\*

#### Geography

Geography Type

#### Sites\*

Site Number

#### Object Related Constituent Xrefs

Constituent Name

#### Acq. Related Constituent Xrefs

Constituent Name

#### Ex-Coll. Related Constituent Xrefs

Constituent Name

#### Media

(Rendition Number + Media Type + File Name)

#### Exhibitions

Exhibition Title

#### Incoming Loans

#### Outgoing Loans

#### Bibliography\*

#### Events\*

#### Shipments\*

#### Parent Records\*

Parent Relationship Name

Child Records\*

Child Relationship Name

See Also Records\*

See Also Relationship Name



Nodes marked with \* will only display if a link or association exists with the current Object record.

# Alternate Hierarchy tree (Deaccessions)

The Deaccessions alternate tree layout provides the option to perform Deaccessioning and Disposal tasks.

Steps for deaccessioning are provided in [Deaccession an Object](#).

# Alternate Hierarchy Tree (Conservation)

The **Conservation alternate tree** layout displays data related to [Conservation](#).

The data that is displayed is determined by product licensing.

The tree displays **Condition and Line Item** reports for the Object.

If **TMS Conservation Studio** is licensed, the tree will instead display **Conservation Reports** for the Object.

# Alternate Hierarchy Tree (Audit Trail)

*Content will be provided in the coming release*

# Add New Object Record

Objects can be added several ways:

[Add a new record](#) from the toolbar.

[Associate a new Object record](#) to the current one.

Regardless of the method used, there are fields required when adding new Object records.

## Fields Required When Adding New Object Records

| Field          | Description                                     | Notes  |
|----------------|---|--|
| Department     | A list of Object Departments.                   | A description of this field is available in the list of <a href="#">main Object record fields</a> .  |
| Object Number  | A unique number for identifying the Object.     | The (...) button will generate the next consecutive Object Number based on existing Objects in the database.<br><br>The Object Number may require a prefix based on the selected Department. This requirement is configured in the <a href="#">TMS Suite Application Configuration Utility</a> . |
| Classification | A list of preconfigured Object Classifications. | A description of this field is available in the list of <a href="#">main Object record fields</a> .  |

For security settings, see **Creating Object Records** on the [Objects Module Security](#) page.

# Associate Object with another Object

When two or more records in the same module are linked together, they are [Associated Records](#). The association is described by the relationship between the records.

There are three Relationship Types for associated Objects: Parent-Child, Child-Parent, and See Also. The relationships are defined in the [Relationships Authority](#), and additional relationships can be created.

When selecting an Object record to associate with the current one, there is the option to select an existing record, or create a new one.

## Create an Association between Object records

1. In an Object record, select the Record Hierarchy Tree node labeled with the Relationship Type for the two records. If there are no Associations for the Relationship Type, select the top node of the tree.
2. Select the node action **Link Related Record**. The Link Related pop-up opens.
3. Select the button for the Relationship Type (Parent, Child, See Also). The Relationship Name will be automatically populated.
4. Select **Lookup** or **New**.

### If Lookup is selected

- If the search will be in the Object Number field only, check **Search only module-level field(s)**.
- Enter a **search value** in the text box.
- Select a [custom filter](#) if needed.
- Select **Search**. A list of Objects matching the search results will display in the grid below.
- Select one or more Objects to associate.
- Select **Add**.

### If New is selected

- The Add New button will display and be enabled.
- Select **Add New**. The Add New Object pop-up will open.
- Enter required values for [Add New Object record](#).
- Select **Add**. The pop-up will close, and the newly associated Object record(s) will open in [Data Entry display mode](#).
- To return to the original Object record, [search for records](#), or select the browser [Back](#) button.

The newly associated record will display when the node labeled with the Relationship Type is selected.

## Relationship Types

### Parent/Child Relationships

In a Parent-Child relationship, one record, the *Parent*, is created to represent a group of other records, the *Children*. An example of a Parent-Child Relationship could be a portfolio of prints, where the overall portfolio is a single parent Object record, and each print is an individual child Object record. Creating individual records allows independent object data for each print when it is catalogued.

### See Also Associations

In See Also relationships, two independent records are linked together because of commonality that cannot be defined any other way. An example of a See Also relationship could be two Object records for artworks that depict the same person or subject matter.

For security settings, see **Associating Records** on the [Special Functions Security](#) page.

# Batch Update Object Records

Updating a group (batch) of records can be performed on the following Object record fields:

- Accession Date
- Accession Method
- Approval Date 1
- Approval Date 2
- [Attributes \(ThesXRefs\)](#)
- Credit Line
- Department
- [Flex Field](#)
- [Flex Field Group](#)
- Flex Field Group - Accessioning (Flex Field Group)
- Flex Field Group - ObjRights (Flex Field Group)
- [Geography Xrefs \(ThesXRefs\)](#)
- Medium
- Object Status
- On View
- [Public Access](#)
- [Single Value Text Entry](#)
- [Status Flags](#)
- [Text Entries](#)

To update a group (batch) of Object records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Object Records** on the [Objects Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Batch Update Records Linked to the Object

In Objects, linked records may be updated as a group from the [List View](#) that displays them.

Refer to [Batch Update Records Linked to the Current Record](#).

# Copy Object Record

New Object records can be created by copying an existing Object record. This may be desirable if Object records that need to be created will have similar cataloging to an Object record already in TMS Collections.

1. To copy an Object record, open the Object record to be copied.
2. Select the **arrow** to the right of the top node in the [Objects Hierarchy Tree](#) and choose **Copy Object**. The window that opens shows options for copying the record and the Object Number that new record(s) should be given.

## Creating a Single Record

1. To create a single Object record, select the **Single Copy** radio button.
2. Use the *Primary object number* pull-down list to select a prefix for the new Object Number if applicable. An example of an Object Number prefix may be *TR*, to indicate that the Object Record is for a temporary receipt object.
3. Type the new Object Number into the field to the right. Use (...) to generate the next unique numeric value to append to the Object Number.
4. If a secondary number, such as an identifying number in a different database, needs to be recorded, use the *Secondary object number* field record a Secondary Object Number.
5. Follow the steps under **Selecting Fields to Copy** below.

## Creating Multiple Records

1. To create multiple Object records, select the **Copy Range** radio button. Use the *Primary* pull-down list to select a prefix for the new Object Numbers if applicable.
2. Type an Object Number into the field to the right. Use (...) to generate the next unique numeric value to append to the Object Number.
3. Use the range fields to the right of the *Primary* fields to indicate a range for how many Object records should be created. The range numbers may start with higher numbers, such as 8-10, to create three records starting with .8 as the first appended number. This may be beneficial for continuing a number pattern where Object records already entered into TMS have used smaller numbers.
4. If a secondary number needs to be recorded, use the *Secondary object number* field to the right to record a secondary Object Number.
5. Follow the steps under **Selecting Fields to Copy** below.

## Selecting Fields to Copy

1. Check the boxes next to tables or fields that should be copied to the new record. **Select All** can be used to quickly select or deselect all of the tables and fields. To save the field selection as a default personal preference or as a default preference for all users, select the **star** icon to the right above the tables/fields list, and choose an option from the pull-down list. Once saved, each time an Object record is copied, the field selection will default to the saved preference. To clear the saved preference, select the **star** and choose either *Clear as Default Preference for all Users* or *Clear Personal Preference*.
2. Check or uncheck the boxes next to the **Copy home locations** and **Copy handling notes** options. *Copy home locations* assigns the home location set for the current record to the copies of the record. *Copy handling notes* copies the contents of the Handling Notes field to the copies of the record.
3. Once all tables and fields to be included in the new records are selected and the boxes in the Options panel are checked appropriately, select **Copy Object** to move to the summary screen. Selecting **Cancel** at any time will close window without saving any changes.
4. The Copy Object summary screen shows the original record that new Object records are going to be created from at the top, and underneath the Primary and Secondary Numbers that will be generated are displayed. At the bottom the number of Object records that will be created is shown as *Number of copies*. If adjustments need to be made to the Object Numbers or the number of Object records being created, select **No** to return to the previous screen to make changes.
5. When ready, select **Yes** to copy the original Object record to make new Object records. Once finished, the new Object records display in a [Data Form \(Data Entry View\)](#).

For security settings, see **Copying Object Records (1)** and **(2)** on the [Objects Module Security](#) page.

# Deaccession an Object

## Add a Deaccession record

1. In an Object record, select the **Deaccession tree** from the Record Hierarchy Tree menu.
2. From the top or Deaccessions node in the tree, select **New Deaccession record**.
3. Enter the required fields and select **Add**. The Deaccession record will load in Data Entry display mode.

## Delete a Deaccession Record

A Deaccession record can only be deleted if it contains no Use of Proceeds records.

1. In an Object record, select the **Deaccession tree** from the Record Hierarchy Tree menu.
2. Select the specific Deaccession record in the tree and select the node option **Delete Deaccession record**.
3. If there is a Use of Proceeds for the record, a usage report will display stating that the record cannot be deleted.
4. Answer **Yes** to the prompt "Are you sure you want to delete this Deaccession record"? The record will be deleted.

## Use of Proceeds

A Use of Proceeds record shows the objects to which the proceeds from the deaccession of an object were applied.

### Add a Use of Proceeds record

- a. In the Object record, in the Deaccession hierarchy tree, select the node for the **specific Deaccession**.
- b. Select the node option **New Use of Proceeds**.
- c. Enter any required fields and select **Add**. The Use of Proceeds record will load in Data Entry display mode.

### Delete a Use of Proceeds record

- a. In an Object record, select the **Deaccession tree** from the Record Hierarchy Tree menu.
- b. Expand the specific Deaccession node in the tree and select the specific Use of Proceeds to be deleted.
- c. Select the node option **Delete Use of Proceeds**.
- d. Answer **Yes** to the prompt "Are you sure you want to remove the selected record"? The record will be deleted.

# Delete Object Records

The process to [delete a record](#) is the same as in other modules.

When attempting to delete an Object record, the [Object Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Object must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Object Records** on the [Objects Module Security](#) page.

# Object Usage Report

When deleting an Object record, its usage will display in an Object Usage Report. Any usage of the Object record that prevents it from being deleted will display in **red**.

## Links to the following record(s) in other modules

- Object-Related Constituent(s) (ConXRefs)
- Accession-Related Constituent(s) (ConXRefs)
- Acquisition-Related Constituent(s) (ConXRefs)
- Bibliography record(s)
- Event record(s)
- Exhibition record(s)
- Insurance record(s)
- Media record(s) (MediaXRefs)
- Loan record(s)
- Shipment record(s)
- Site record(s)

## Related Object records:

- Parent Object record(s)
- Child Object record(s)

## Usage in Other TMS Products:

If there is a valid license for other TMS Suite products, or there was a previous license for **TMS for Windows**, the Usage report will list records from those products that are linked to the Object.

### **TMS Conservation Studio**

- Project record(s)
- [Conservation Report records](#)

### **TMS Media Studio**

- Project record(s)

### **TMS for Windows**

- [Intellectual Children](#)

# Edit/View Object Records

Select an Object record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Objects module: [Open Package Records](#) (from the Package panel or Manage Package Folders), or [Open record\(s\) from Object Working List](#)

The method for viewing and editing Object records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Object Records** on the [Objects Module Security](#) page.

# Link Object to Records in Other Modules

Object records may be [linked to records in other modules](#).

Data that pertains to the link between the Object and the other record is considered part of the Object Main data ([data linked to Object from other modules](#)).

In the Object record, linking to records in other modules is performed by selecting the node labeled with the module name in the [Objects Hierarchy Tree](#).

## Link Records in Another Module to the Current Object Record

In an Object record, records from other modules may be linked to the Object using several different methods:

- [Link an existing record](#)
- [Add a new record to link](#)
- To link Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget (select the top tree node)
- To link Media records, use the [Linked Media References \(MediaXRefs\)](#) widget (select the top tree node)
- To link a Crate record, [move an Object to a Crate](#)

In the *other* module, Objects in a Package or the Object Working List can be linked to the record. Refer to [Linking Objects using Package or Object Working List](#).

## Unlink a Record

Follow the steps to [Unlink a record](#).

For security settings, see linked pages above, as well as [Linking Records in Other Modules to Current Object Record](#) on the [Objects Module Security](#) page.

# Link Objects Using Package or Object Working List

In *other modules*, Objects can be linked using methods aside from **Add Object** or **Link Object** option in the record's Hierarchy Tree.

Two methods that can be used *from the other module* to link Object records are using a *Package* or *Object Working List*

## Link/Add Object(s) to (Module) using Package

1. In the record in the other module, select the **Objects node** in the Record Hierarchy Tree.
2. Select the node option to **Add Objects to (module name) using Package**. The Package Search window opens.
3. Using the filters, search for the package that contains the Object(s) that should be linked to the current record.
4. The search can be saved as a preference by clicking the **star** in the upper right of the window.
5. Select **FIND**.
6. A list of Packages that meet the search criteria display at the bottom of the window.
7. Select/Check a package and then select **OPEN PACKAGE**. The Add Object(s) to (Module) using Package window opens.
8. Select/Check the Objects to link to the current record.
9. Select **ADD SELECTED** or select **ADD ALL** to link all of the objects.
10. A prompt opens asking if the user is sure they want to add the records. Select **YES**. The window closes.

The newly linked Objects will display in the List View for linked Objects (when the Object node is selected).

## Add Object Working List items to (module name)

1. In the record in the other module, select the **Objects node** in the Record Hierarchy Tree.
2. Select the node option to **Add Objects Working Lis items to (module name)**. The Add Object Working List Items to (Module) window opens.
3. Select/check the Objects to link to the current record.
4. Select **ADD SELECTED** or **ADD ALL** (to link all Objects in the list).
5. Answer **YES** to the prompt asking if the user is sure they want to add the records.

The newly linked Objects will display in the List View for linked Objects (when the Object node is selected).

For security settings, see **Linking Objects to Records in Other Modules** on the [Objects Module Security](#) page.

# Navigate to Records Related to the Object

Navigation to records that are linked to the Object can be performed 2 ways: the Related toolbar option or opening records from a List View.

[Related Records toolbar option for Objects](#)

[Opening records from a List View displaying linked records](#)

# Related Records (Toolbar) for Objects

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Object record or the entire current record selection.

| Navigation option                  | Module             | Link created in Object record  | View link other module  |
|------------------------------------|--------------------|--|---|
| Acq. Related Constituent Xrefs     | Constituents       | <a href="#">Objects Hierarchy Tree</a> > Acq. Related Constituent Xrefs node or <a href="#">widget</a>     | <a href="#">Constituents Hierarchy Tree</a> > Related Records > Objects - Acquisition Related node > <a href="#">Batch Link Constituent</a> |
| Ex-Coll. Related Constituent Xrefs | Constituents       | <a href="#">Objects Hierarchy Tree</a> > Ex-Coll. Related Constituent Xrefs node or <a href="#">widget</a> | <a href="#">Constituents Hierarchy Tree</a> > Related Records > Objects - Ex-collection node > <a href="#">Batch Link Constituent</a>       |
| Object Related Constituent Xrefs   | Constituents       | <a href="#">Objects Hierarchy Tree</a> > Object Related Constituent Xrefs node or <a href="#">widget</a>   | <a href="#">Constituents Hierarchy Tree</a> > Related Records > Objects - Artist/Maker node > <a href="#">Batch Link Constituent</a>        |
| Related Bibliography               | Bibliography       | <a href="#">Objects Hierarchy Tree</a> > Top node or Bibliography node                                     | <a href="#">Bibliography Hierarchy Tree</a> > Objects node  |
| Related Events                     | Events             | <a href="#">Objects Hierarchy Tree</a> > Top node or Events node   | <a href="#">Events Hierarchy Tree</a> > Objects node  |
| Related Exhibitions                | Exhibitions        | <a href="#">Objects Hierarchy Tree</a> > Exhibitions node  | <a href="#">Exhibitions Hierarchy Tree</a> > Objects node   |
| Related Insurance Policies         | Insurance Policies | <a href="#">Objects Hierarchy Tree</a> > Insurance Policies node   | <a href="#">Insurance Policies Hierarchy Tree</a> > Objects node  |
| Related Loans                      | Loans              | <a href="#">Objects Hierarchy Tree</a> > Incoming Loans or Outgoing Loans node                             | <a href="#">Loans Hierarchy Tree</a> > Objects node   |
| Related Media                      | Media              | <a href="#">Objects Hierarchy Tree</a> > Media node or <a href="#">Related MediaXrefs widget</a>           | <a href="#">Media Hierarchy Tree</a> > Objects node   |
| Related Shipments                  | Shipping           | Link <b>not</b> created in Object record   | <a href="#">Shipment Hierarchy Tree</a> > Objects node  |
| Related Sites                      | Sites              | <a href="#">Objects Hierarchy Tree</a> > Top node or Sites node  | <a href="#">Sites Hierarchy Tree</a> > Objects node   |

# Object Working List (Objects Module)

The **Object Working List** is a user-specific list of Object records that can be used for various purposes. It is often used to group records that may be difficult to obtain in a query.

It is not a **Package** and does not have the same functionality. It is **created and maintained** in the Objects module only.

Each user may create one Object Working List, which will be accessible to only that user.

The list is permanent. It is not related to the current record selection and retains its contents until the user deletes them.

## Open the Object Working List

- Select **Object Working List** in the right-side toolbar. Its contents will display in a collapsible list the right-side panel (similar to a Package).

## Close (Collapse) the List

- Select the collapse **arrow** in the right side panel. The list will remain populated and not lose any items – and it will only be closed from display.
- The list automatically closes from display when records from a different module are loaded, or when returning to the Dashboard.

## Adding and Removing Records from the List

- Use the toolbar options to add or remove list records.

## Object Working List Toolbar Options

A **Select All** option is available in the first cell/first column of the list.

| Option   | Description  | Notes  |
|--|--|--|
| Up arrow (double-carat)  | Moves the selected record upward in the list.  | A record must be selected for this option to be enabled.                 |
| Down arrow (double-carat)  | Moves the selected record downward in the list.  | A record must be selected for this option to be enabled.                 |
| Cut (scissors)   | For reordering: removes the selected record from the list to be pasted elsewhere.          | The selected record remains in place until pasted elsewhere in the list. |
| Paste  | For reordering: places the selected record to the current position in the list.            |  |
| Open   | Opens the selected Object records in the list in <a href="#">Data Entry display mode</a> . |  |
| Add     | Adds the current record to the list.   |  |
| Add (++)   | Adds the entire current record selection to the list.                                      |  |
| Remove  | Removes the selected records from the list.  |  |

# Uses of the Object Working List

*Content for this page will be provided in a future release.*

# Change Object Number/Change Object Department

An Object Number may be changed.

1. Select the option **Change Object Number/Change Object Department** in the top node of the [Objects Hierarchy Tree](#).
2. Enter the new Object Number. The three dots (...) option may be selected to add the next consecutive number based on existing Object Numbers.
3. Select **SAVE**.

If the option **Save the previous Object Number as an Alternate Number** is selected, then the previous Object Number will be saved similarly to entering a new Alternate Number in the [Alternate Numbers widget](#) and will subsequently display in the widget.

For security settings, see [Changing Object Numbers](#) and [Changing Object Record Departments](#) on the [Objects Module Security](#) page

# Move an Object

By performing an Object move, the physical relocation of an Object is recorded in the database and becomes part of its Location History.

All moves are performed at the component level, and are accessible under the **Object > Components > Component > Location History node** in the [Objects Hierarchy Tree](#).

Moves are performed using the [Move Assistant](#), which is available by selecting the **Move** icon in the [TMS Collections Toolbar](#).

**Note:** If the Component is located in a Crate, the component can be relocated by moving the Crate that contains it. Refer to [Move a Crate](#) for more information.

## Rules for Moving Object Components

A move will be prevented under the following conditions and an error message will display.

| Message   | Cause/Reason   |  |
|---|--|--|
| "The target location was unavailable at the selected Move Time" | if the Move Time is reselected after the Target location, and the location was non-existent or otherwise unavailable at the new time, then this message will display |  |

*Additional content for this page will be provided in a future release.*

# Conservation

Conservation information is available in the [Conservation hierarchy tree](#).

The data that is displayed is determined by product licensing. The tree displays **Condition and Line Item** reports for the Object. If **TMS Conservation Studio** is licensed, the tree will instead display **Conservation Reports** for the Object.

*Additional Content will be provided in a future release.*

# Constituents

The Constituents module is used to record information about individual people, groups, or entities such as businesses. Constituents can be linked to other records where they are related. For example, a Constituent record created for an artist would be linked to corresponding Object records by that artist. The same Constituent record may also be linked to other records in different roles. For example, the same Constituent record for an artist may be linked to an Event record, where instead of artist, the constituent is a speaker at a lecture.

A list of the fields available for viewing or editing in the Constituents module is in [Constituent data](#).

The [Constituents Record Hierarchy Tree](#) provides a hierarchical view of a Constituent record. It has functionality for adding data and linking and associating other records.

# Constituent Data

**Constituent** records have many categories of data directly related to the Constituent itself. The core Constituent data is divided into the main (or module-level) context, and multiple sub-categories, or sub-contexts.

The different contexts of a Constituent record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#), or a specific tree node.

## Constituent Contexts

| Context   | Node or Tree                        | Fields  |
|---|-------------------------------------|---|
| <a href="#">Main Constituent Record</a>           | Top node                            | Data in the main Constituent record and some sub-categories   |
| <a href="#">Constituent Alternate Names</a>       | Constituent Alternate Names node    | Alternate name-related fields   |
| <a href="#">Constituent Addresses</a>             | Constituent Addresses node          | Address-related fields  |
| <a href="#">Constituent Geography</a>             | Geography node                      | Geography fields  |
| <a href="#">Linked records from other modules</a> | Node labeled with module name       | Fields related to the link between the records; in some cases, the linked record itself may be edited   |
| <a href="#">Associated Constituent records</a>    | Node labeled with relationship name | Fields related to the relationship; for each type of relationship, records are in a read-only List View |

In some Constituent contexts, there may be buttons on a Data Form that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseumLookup](#)). These widgets are not included on any field lists since they are not part of any record.

# Main Constituent Record

The main Constituent record is accessed by selecting the top node of the [Constituents Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the fields available belong to sub-categories, or sub-contexts, but do not require the selection of a separate tree node. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

## Constituent Record Fields

| Field                                       | Description  | Context                         | User Defined? | Authority Controlled? | On System Data Form? |
|---|--|---------------------------------|---------------|-----------------------|----------------------|
| Active                                      | Indicates if a Constituent record is currently active.<br><br>Automatically checked for new Constituent records by default. To disable, updating the <i>NewConstituent.Default.Active</i> setting in the <a href="#">TMS Suite Application Configuration Utility</a> .   | Constituents                    | No            | No                    | Yes                  |
| Alpha Sort                                  | Used to sort Constituent records. If the First Name, Family Name (Last Name), or Institution fields are populated, a drop down menu will allow the user to choose the Alpha Sort. The Alpha Sort field can also be entered without populating the other fields. The Alpha Sort chosen from the drop down may also be amended by typing directly into the field.<br><br>By default, a comma separates the names in this field. A different character can be assigned as the separator in the <i>NewConstituent.AlphaSort.NameSeparator</i> setting in the <a href="#">TMS Suite Application Configuration Utility</a> . | Constituents                    | No            | No                    | Yes                  |
| <a href="#">Alternate Display Bios</a>      | An alternate or additional Display Bio for a constituent. May be selected to display in a linked record.   | Constituent Display Bios        | No            | No                    | Yes                  |
| <a href="#">Alternate Numbers</a>           | An alternate number associated with a Constituent record, such as a number for the same constituent in another database. Can also be used to enter a URL to launch a webpage associated with a constituent.  | Constituents /Alternate Numbers | No            | No                    | Yes                  |
| Approved                                    | Can be used to indicate if a Constituent record is approved. May be useful to note that record data has been reviewed before it is made public.  | Constituents                    | No            | No                    | Yes                  |
| <a href="#">Attributes (ThesX Refs)</a>     | Thesaurus controlled terms related to a constituent, such as gender, occupation, or type of corporation.   | Constituents /Attributes        | Yes           | Yes                   | Yes                  |
| Begin Search Date                           | The begin date for a constituent, such as a birthdate, or start of active period.  | Constituents                    | No            | No                    | Yes                  |
| Biography                                   | Bibliographic information about a constituent.   | Constituents                    | No            | No                    | Yes                  |
| Code  | A code for a constituent that references the same constituent record in another system, such as the Getty Institute's <i>Union List of Artist Names (ULAN)</i> .   | Constituents                    | No            | No                    | Yes                  |
| <a href="#">Constituent Addresses</a>       | Address entries for a constituent.   | Constituent Addresses           | No            | No                    | Yes                  |
| <a href="#">Constituent Alternate Names</a> | Alternate names for a constituent.   | Constituent Alternate Names     | No            | No                    | Yes                  |
| <a href="#">Constituent E-Mails</a>         | Displays email address entries for a constituent.  | Constituent E-Mail              | No            | No                    | Yes                  |
| <a href="#">Constituent Geography</a>       | Geographic locations entered for a constituent.  | Constituent Geography           | No            | No                    | Yes                  |
| <a href="#">Constituent Phones</a>          | Displays telephone number entries for a constituent.   | Constituent Phones              | No            | No                    | Yes                  |

|                                     |  |                               |     |  |                                     |
|-------------------------------------|--|-------------------------------|-----|--|-------------------------------------|
| Constituent Type                    | A type of constituent, such as Individual, Institution, or Corporate Body.   | Constituent Types             | No  | Yes                                    | Yes                                 |
| Culture /Group                      | A culture or group that is part of a constituent name intended to be used when a constituent name is unknown, such as Native American, or Oceanic.   | Constituents                  | No  | No                                     | Yes                                 |
| Display Bio                         | Populated by a concatenation of the values in the <i>Nationality</i> and <i>Begin Search Date</i> and <i>End Search Date</i> fields. After data is entered into one or more of these fields, a drop down menu will allow the user to choose a Display Bio. The field may also be typed directly into, and Alternate Bio entries can be added.<br><br>When a Constituent record only has a <i>Begin Search Date</i> field value, by default, the word <i>born</i> will display before the date value for an individual, and the word <i>founded</i> will display before the date for a non-individual record. These values may be changed in the <i>NewConstituent.Individual.DisplayBio.Default</i> and <i>NewConstituent.NonIndividual.DisplayBio.Default</i> settings in the <a href="#">TMS Suite Application Configuration Utility</a> | Constituent Display Bios      | No  | No                                     | Yes                                 |
| Display Name                        | If the First Name, Family Name (Last Name), or Institution fields are populated, a drop down menu will allow the user to choose a Display Name. The Display Name field can also be typed into without populating the other fields. The Display Name chosen from the drop down may also be amended by typing directly into the field.   | Constituents                  | No  | No                                     | Yes                                 |
| End Search Date                     | The end date for a constituent, such as a death date, or end of active period.   | Constituents                  | No  | No                                     | Yes                                 |
| Family Name (Last Name)             | A last name for a constituent.   | Constituents                  | No  | No                                     | Yes                                 |
| First Name                          | A first name for a constituent.  | Constituents                  | No  | No                                     | Yes                                 |
| Flex Fields                         | Flex Fields are "flexible" or user-created fields that are configured in the <a href="#">TMS Suite Application Configuration Utility</a> . All <b>ungrouped</b> flex fields for a record display together in a "container."<br><br><b>Grouped</b> Flex Fields are related and can include workflow and approval information. A Flex Field group displays in its own container.   | Constituent Flex Field Xrefs  | Yes | Depends on configuration of Flex Field | No<br>May be added to any Data Form |
| <a href="#">Geography XRefs</a>     | Thesaurus controlled geography terms related to a constituent, such as place of birth.   | Constituents /Geography Xrefs | No  | Yes                                    | Yes                                 |
| <a href="#">Historical Dates</a>    | Date entries related to a constituent other than the values in the <i>Begin Search Date</i> and <i>End Search Date</i> fields, such as the dates that an artist worked in a particular country, or in a specific style.  | Constituent Dates             | No  | No                                     | Yes                                 |
| Title                               | A title expressing status, respect, or politeness, such as His Majesty, Reverend, Doctor.  | Constituents                  | No  | No                                     | Yes                                 |
| Institution                         | The name of an institution when a constituent is not an individual, such as the name of a corporate body.  | Constituents                  | No  | No                                     | Yes                                 |
| Position                            | A job title for a constituent. May be useful for recording job titles in Constituent records for an institution's employees.   | Constituents                  | No  | No                                     | Yes                                 |
| Locked                              | Prevents edits from being made to Constituent record fields when checked. Must be unchecked before updates can be made.  | Constituents                  | No  | No                                     | Yes                                 |
| Middle Name                         | A middle name for a constituent.   | Constituents                  | No  | No                                     | Yes                                 |
| Nationality                         | A demonym for a nation to which a constituent belongs, such as Italian, American, or Lebanese.   | Constituents                  | No  | No                                     | Yes                                 |
| Private Collector                   | Indicates if a Constituent record is for a private collector.  | Constituents                  | No  | No                                     | Yes                                 |
| Public Access                       | Controls whether a Constituent record is available be used on the institution's website.   | Constituents                  | No  | No                                     | Yes                                 |
| <a href="#">Related MediaX Refs</a> | Media Cross Reference Grid where Media records related to a constituent can be linked.   | Constituents/Media Xrefs      | No  | No                                     | Yes                                 |
| Remarks                             | Any notes or comments about a constituent.   | Constituents                  | No  | No                                     | Yes                                 |
| Salutation                          | A way of greeting a constituent, such as <i>Dear John</i> .  | Constituents                  | No  | No                                     | Yes                                 |
| School                              | A school or style to which a constituent is associated, such as Bauhaus, or Hudson River School.   | Constituents                  | No  | No                                     | Yes                                 |

|                              |  |                           |    |     |     |
|------------------------------|--|---------------------------|----|-----|-----|
| Staff                        | May be used to indicate that a constituent is on staff at an institution. Automatically populated when a Constituent record is linked to a TMS User Account in the TMS Database Configuration Utility. | Constituents              | No | Yes | Yes |
| Suffix                       | A title or word appended after a constituent name, such as Junior, III, or Esquire.  | Constituents              | No | No  | Yes |
| <a href="#">Text Entries</a> | Text Entries related to a constituent, such as correspondence or research information.   | Constituents/Text Entries | No | No  | Yes |

# Constituent Alternate Display Bios

In a Constituent record, the *Display Bio* field is populated with the values in the *Nationality*, *Begin Search Date*, and *End Search Date* fields.

In some instances it may be necessary to have *Alternate Display Bios* for a constituent to display in a linked record. When a Constituent record is linked to another record in TMS Collections, an *Alternate Display Bio* can be selected to display in the linked record instead of the primary *Display Bio*.

For example, for an artist that is born in a specific country and creates work there and then later moves to another country and produces additional works, two bios might be created to reflect those different periods in the artist's life. The first bio may be used when linked to the works created while in the first country, and the second may be linked to works created after the artist moved to another country.

In a Constituent record, the *Alternate Display Bios* widget displays alternate bios in a grid format.

The following buttons are displayed in the upper right above the grid.

## Toolbar buttons:

| Button                          | Icon               | Function   |
|---------------------------------|--------------------|--|
| Refresh                         | Refresh            | Resets the widget so that it is no longer in Edit mode.  |
| Set As Default Display Bio      | Thumbtack          | Select to overwrite the <i>Display Bio</i> field with the selected <i>Alternate Display Bio</i> .        |
| Add a new alternate display bio | +                  | Create a new <i>Alternate Display Bio</i> .  |
| Delete an alternate display bio | x                  | Delete an <i>Alternate Display Bio</i> .   |
| Move Up and Move Down           | Up and Down Arrows | Use the move up and move down buttons to change the display order of the <i>Alternate Display Bios</i> . |



The heading for any of the *Alternate Display Bio* fields can be clicked to sort the names by that field.

## Creating an Alternate Display Bio

1. Open a Constituent record.
2. Navigate to the *Alternate Display Bios* widget.
3. Select **Add**  in the upper right above the grid. A new row will appear.
4. Select the field under *Display Bio* and enter the alternate bio information.
5. The *Active* and *Displayed* boxes are checked by default. The *Active* box indicates that the Alternate Display Bio is active in the database. The *Displayed* box determines if the Alternate Display Bio displays in the *Alternate Bio* field.
6. In the *Remarks* field, enter any notes if needed. The new alternate bio will display in the widget.

## Editing an Alternate Bio

1. In the *Alternate Display Bios* grid, select the bio to edit.
2. Type the updated bio information in the *Display Bio* field.
3. Check or uncheck the *Active* and *Displayed* checkboxes if needed.

## Alternate Bio Display Order

1. In the *Alternate Display Bios* grid, select the bio to re-order.
2. Use the **Up** and **Down** arrows to the right above the grid to change the order.

## Setting the Default Display Bio

1. In the *Alternate Display Bios* grid, select the bio to set as the default.
2. Select **Set as Default Display Bio** (thumbtack icon) to the right above the grid. A prompt opens asking if the user wants to overwrite the default *Display Bio* with the selected bio.
3. Select **Yes** to replace it or **No** to cancel. After selecting **Yes**, the *Display Bio* will be updated and the former *Display Bio* will be added as an *Alternate Display Bio*.

## Deleting an Alternate Display Bio

1. In the *Alternate Display Bios* grid, select the bio to delete.
2. Select **Delete**  to the right above the grid. A prompt opens asking if the bio should be deleted.
3. Select **Yes** to delete it or **No** to cancel.



If the deleted alternate display bio was in use on a related record(s), it will be removed from the related record(s). Navigate to the record(s) where the alternate display bio was in use and choose another *Display Bio* to display on those records.

For security settings, see **Constituent Display Bios** on the [Constituents Module Security](#) page.

# Constituent Addresses

The following fields are available for entering information about constituent addresses.

Most of the fields are available on a system [Data Form \(Data Entry View\)](#). Any fields that are not present may be added to any form using [TMS Composer](#).

Refer to [Add/Edit/Delete Constituent Addresses](#).

## Constituent Address Fields

| Field            | Description   | Context               | User Defined? | Authority Controlled? | On System Data Form?                |
|------------------|---|-----------------------|---------------|-----------------------|-------------------------------------|
| Active           | Indicates if an address entry is active.  | Constituent Addresses | No            | No                    | Yes                                 |
| Address Format   | An address formatting style that corresponds with the country selected in the <i>Country</i> field. | Constituent Addresses | No            | Yes                   | No<br>May be added to any Data Form |
| Address Type     | A type of address being entered for a constituent, such as Business, Home, or Studio.               | Constituent Addresses | No            | Yes                   | Yes                                 |
| Begin Date       | The begin date for an address entry.  | Constituent Addresses | No            | No                    | No<br>May be added to any Data Form |
| City             | A city.   | Constituent Addresses | No            | No                    | Yes                                 |
| Country          | A country.  | Constituent Addresses | No            | Yes                   | Yes                                 |
| Default Mailing  | Indicates if an address entry is the default for mailing purposes.                                  | Constituent Addresses | No            | No                    | Yes                                 |
| Default Shipping | Indicates if an address entry is the default for shipping purposes.                                 | Constituent Addresses | No            | No                    | Yes                                 |
| Default Billing  | Indicates if an address entry is the default for billing purposes.                                  | Constituent Addresses | No            | No                    | Yes                                 |
| Display Address  | Displays the address information.   | Constituent Addresses | No            | No                    | Yes                                 |
| Display Name 1   | A primary display name for an address entry.  | Constituent Addresses | No            | No                    | Yes                                 |
| Display Name 2   | A second display name for an address entry.   | Constituent Addresses | No            | No                    | Yes                                 |
| End Date         | The end date for an address entry.  | Constituent Addresses | No            | No                    | No<br>May be added to any Data Form |
| Remarks          | Any notes about an address entry.   | Constituent Addresses | No            | No                    | No<br>May be added to any Data Form |
| Street Line 1    | A primary street name and number.   | Constituent Addresses | No            | No                    | Yes                                 |
| Street Line 2    | A second line for additional street name and number information.                                    | Constituent Addresses | No            | No                    | Yes                                 |
| Street Line 3    | A third line for additional street name and number information.                                     | Constituent Addresses | No            | No                    | Yes                                 |
| State /Province  | A state or province.  | Constituent Addresses | No            | No                    | Yes                                 |
| Zip Code         | A zip code.   | Constituent Addresses | No            | No                    | Yes                                 |

# Add/Edit/Delete Constituent Addresses

Multiple addresses may be entered in a Constituent record. This is helpful for recording addresses that are used for different purposes, such as a home address or work address.

## Creating an Address

Constituent addresses are created by selecting the option from the drop down menu in the top node (constituent name) of the [Constituents Hierarchy Tree](#).

After at least one address is created, the Constituent Addresses node will appear in the tree. The blue drop down arrow to the right of the Constituent Addresses node can also be used to add a new address.

1. Select the **blue arrow** to the right of the constituent name, or to the right of the Constituent Addresses node, and choose **Add New Constituent Address** from the drop down menu. The Add New Constituent Address window opens.
2. Enter the desired fields. Refer to [Constituent Addresses](#) for information about these fields.
3. When finished, select **Add** to save the new address and return to the Constituent record.
4. The address will display under the Constituent Addresses node in the tree.
5. Selecting **Cancel** at any time will close the window and the address will not be saved.

## Editing an Address

1. Under the Constituent Addresses node in the tree, select the address to edit. The address will display in a [Data Form \(Data Entry View\)](#).
2. Edit the desired fields. If the user has rights to edit a field, it will be enabled; otherwise, it will still display, but cannot be edited.

## Deleting an Address

1. Under the Constituent Addresses node in the tree, select the address to delete.
2. Select the **blue arrow** to the right of the address and choose **Delete Selected Constituent Address(es)** from the drop down menu.
3. A prompt will open asking if the address should be deleted. Select **Yes** to delete the address.

For security settings, see **Constituent Addresses** on the [Constituents Module Security](#) page.

# Constituent Alternate Names

The following fields are available for entering information about constituent alternate names.

Refer to [Add/Edit/Delete Constituent Alternate Names](#).

## Constituent Alternate Name Fields

| Field                           | Description  | Context                     | User Defined? | Authority Controlled? | On System Data Form? |
|---------------------------------|--|-----------------------------|---------------|-----------------------|----------------------|
| <a href="#">Alternate Names</a> | Alternate names for a constituent, such as a maiden name, or an abbreviated form of a name. May be selected to display in a linked record.   | Constituent Alternate Names | No            | No                    | Yes                  |
| Name Type                       | The type of Alternate Name being entered, such as ULAN Display, Maiden Name, or Former Name.   | Constituent Alternate Names | No            | No                    | Yes                  |
| Display Name                    | If the First Name, Family Name (Last Name), or Institution fields are populated, a drop down menu will allow the user to choose a Display Name. The Display Name field can also be typed into without populating the other fields. The Display Name chosen from the drop down may also be amended by typing directly into the field.   | Constituent Alternate Names | No            | No                    | Yes                  |
| Alpha Sort                      | Used to sort Constituent records. If the First Name, Family Name (Last Name), or Institution fields are populated, a drop down menu will allow the user to choose the Alpha Sort. The Alpha Sort field can also be typed into without populating the other fields. The Alpha Sort chosen from the drop down may also be amended by typing directly into the field.<br><b>Note:</b> By default, a comma separates the names in the <i>Alpha Sort</i> field. A new character can be selected instead by updating the value in the <i>NewConstituent.AlphaSort.NameSeparator</i> setting in the TMS Database Configuration Utility. | Constituent Alternate Names | No            | No                    | Yes                  |
| First Name                      | A first name for a constituent.  | Constituent Alternate Names | No            | No                    | Yes                  |
| Middle Name                     | A middle name for a constituent.   | Constituent Alternate Names | No            | No                    | Yes                  |
| Last Name                       | A last name for a constituent.   | Constituent Alternate Names | No            | No                    | Yes                  |
| Suffix                          | A title or word appended after a constituent name, such as Junior, III, or Esquire.  | Constituent Alternate Names | No            | No                    | Yes                  |
| Position                        | Job title  | Constituent Alternate Names | No            | No                    | Yes                  |
| Salutation                      | A way of greeting a constituent, such as Dear John.  | Constituent Alternate Names | No            | No                    | Yes                  |
| Institution                     | The name of an institution when a constituent is not an individual, such as the name of a corporate body.  | Constituent Alternate Names | No            | No                    | Yes                  |
| Culture /Group                  | A culture or group that is part of a constituent name intended to be used when a constituent name is unknown, such as Native American, or Oceanic.   | Constituent Alternate Names | No            | No                    | Yes                  |
| Alternate Name Remarks          | Remarks about the alternate name.  | Constituent Alternate Names | No            | No                    | Yes                  |

# Add/Edit/Delete Constituent Alternate Names

**Alternate Names** can be created in Constituent records. This is helpful for recording other names that a constituent may use for different purposes while still maintaining one record for the constituent. Example alternate names may be maiden names, former names, or aliases. When a Constituent record is linked to another record in TMS, an Alternate Name can be selected to display in the linked record.

Constituent Alternate Names are created by selecting the option from the drop down menu in the top node (Constituent Name) of the [Constituents Hierarchy Tree](#).

The Constituent Alternate Names node will appear in the tree after at least one Alternate Name is created. The blue drop down arrow to the right of the Constituent Alternate Names node can also be used to add a new alternate name.

## Creating an Alternate Name

1. Open a Constituent record.
2. Select the **blue arrow** to the right of the constituent name or to the right of the Constituent Alternate Names node and select **Add New Constituent Alternate Name** from the drop down menu. The available fields will display in a [Data Form \(Data Entry View\)](#).
3. Enter information in the desired fields. Refer to [Constituent Alternate Names](#) for information about these fields.
4. Once the name is created it appears under the Constituent Alternate Names node in the tree.

## Editing an Alternate Name

1. Under the Constituent Alternate Names node in the tree, select the Constituent alternate name to edit. The alternate name will display in a [Data Form \(Data Entry View\)](#).
2. Edit the desired fields. If the user has rights to edit a field, it will be enabled; otherwise, it will still display, but cannot be edited.

## Deleting an Alternate Name

1. Select the **blue arrow** to the right of the Alternate Name in the tree and choose **Delete Constituent Alternate Name(s)**.
2. A prompt opens asking if the selected record(s) should be removed. Select **Yes** to continue or **No** to cancel.

## Set as Primary Name

1. Select the **blue arrow** to the right of the Alternate Name in the tree and choose **Set as Primary Name**.
2. A prompt opens asking if the selected records should be updated. Select **Yes** to continue or **No** to cancel.
3. When Yes is selected the alternate name will become the primary name and the former primary name will become an alternate name.

For security settings, see **Constituent Alternate Names** on the [Constituents Module Security](#) page.

# Constituent E-Mails

Multiple e-mail addresses may be entered in a Constituent record. This is helpful for recording e-mail addresses that are used for different purposes, such as a personal e-mail address, or a business e-mail address. In a record, Constituent emails are displayed in a grid format.

## Constituent E-mail Fields

| Field       | Description   | Context            | Authority Controlled? |
|-------------|---|--------------------|-----------------------|
| E-Mail      | An e-mail address for a constituent.                  | Constituent E-mail | No                    |
| Type        | A type of e-mail address, such as Home or Office.     | Constituent E-mail | Yes                   |
| Description | A description for an e-mail address. Expandable field | Constituent E-mail | No                    |

## Creating a Constituent E-mail

1. Open a Constituent record.
2. Navigate to the *Constituent E-Mails* widget.
3. Select **Add**  to the right above the grid. A new row will appear.
4. Select the field under *E-Mail* in the new row and enter the e-mail address.
5. Choose a *Type* from the drop-down menu.
6. Enter a description if desired.

## Editing a Constituent E-mail

1. In the *Constituent E-Mails* grid, select the e-mail address to edit.
2. Enter the updated information in the desired fields.

## Deleting a Constituent E-mail

1. In the *Constituent E-Mails* grid, select the e-mail address to delete.
2. Select **Delete**  to the right above the grid.
3. A prompt opens asking if the email address record should be deleted. Select **Yes** to delete it or **No** to cancel.

For security settings, see **Constituent E-Mail** on the [Constituents Module Security](#) page.

# Constituent Geography

**Constituent** Geography fields are in the **Constituent Geography context**, or sub-category.

Selecting the **Geography node** in the [Constituents Hierarchy Tree](#) displays a list of all Geography Types assigned to a Constituent. Selecting an individual node labeled with a Geography Type will display its [Geography Fields](#) in a [Data Form \(Data Entry View\)](#).

For security settings, see **Constituent Geography** on the [Constituents Module Security](#) page.

# Constituent Phones

Multiple telephone numbers may be entered in a Constituent record. This is helpful for recording phone numbers that are used for different purposes, such as a home number or work number. In a record, Constituent phone numbers are displayed in a grid format.

## Constituent Phone Fields

| Field       | Description  | Context            | Authority Controlled? |
|-------------|--|--------------------|-----------------------|
| Number      | A telephone number. Be mindful to enter the number in this field using the preferred number formatting, such as putting parenthesis around an area code. | Constituent Phones | No                    |
| Type        | A type of telephone number, such as Home, Office, or Fax.  | Constituent Phones | Yes                   |
| Description | A description for a phone number. The ... button that appears in this field expands the field in a new window.   | Constituent Phones | No                    |

## Creating a Constituent Phone

1. Open a Constituent record.
2. Navigate to the *Constituent Phones* widget.
3. Select **Add**  in the upper right above the grid. A new row will appear.
4. Select the field under *Number* in the new row and enter the phone number.
5. Choose a *Type* from the drop-down menu.
6. Enter a description if desired.

## Editing a Constituent Phone

1. Under *Constituent Phones*, select the telephone number to edit.
2. Enter the updated information in the desired fields.

## Deleting a Constituent Phone

1. Under *Constituent Phones*, select the telephone number to delete.
2. Select **Delete**  in the upper right above the grid.
3. A prompt opens asking if the phone number should be deleted.
4. Select **Yes** to delete it or **No** to cancel.

For security settings, see **Constituent Phones** on the [Constituents Module Security](#) page.

# Constituent Link (ConXRef) Data

In other modules, a Constituent record is linked as a **Related** Constituent (or **ConXRef**) to the current record using one of the following options:

From the record in the other module:

- the [Linked Constituent References \(ConXRefs\)](#) widget in the other module
- the **Link Constituent** option in the Constituents node of the Record Hierarchy Tree (not available in all modules)

From the Constituent record:

- the **Batch Link Constituent** option

In the Constituent record, the records linked to the Constituent as a ConXRef, are accessible in the [Constituent Hierarchy Tree](#). Under the **Related Records** node is a node for each module. Selecting a node labeled with a module name displays a read-only [List View](#) of records from that module that are linked to the Constituent record. For Objects, the nodes are labeled with a **Role Type** (Acquisition related, Artist/Maker, or Ex-Collection).

\*It is important to understand that a related Constituent record - linked using [Linked Constituent References \(ConXRefs\)](#) widget - is not the same as a record that was linked from within the Constituent record. So, Media records that were linked using the MediaXRefs widget are not the same as Related Media records that were linked in the other module in the ConXRef widget.

## Constituent Link Fields (not all fields are available in the ConXRefs widget)

| Field                               | Description  |
|-------------------------------------|--|
| Active                              | Controls whether a Constituent Cross Reference is currently active.  |
| Address                             | Used to select an address entry for a constituent as it relates to a linked record.  |
| Amount                              | Can be used to enter a monetary amount or fee for a constituent as the constituent relates to a linked record.   |
| <a href="#">Anonymity Requested</a> | Controls whether a constituent prefers to remain anonymous. When selected, a value such as <i>Anonymous Donor</i> displays in place of the constituent's name.<br><br><div style="border: 1px solid #ffc107; padding: 5px; margin-top: 10px;">  This field is only available in Objects for Constituents linked as <i>Acquisition Related</i> or <i>Ex-Collections Related</i> Role Types.         </div> |
| <a href="#">Attributes</a>          | Thesaurus controlled terms for a Constituent record as it relates to a linked record.  |
| Constituent Names                   | Used to select an Alternate Name entry for a constituent that is appropriate in context to a linked record. By default, populated with the primary name entered in the Constituent record.   |
| Display Bio                         | Used to select an Alternate Bio entry for a constituent that is appropriate in context to a linked record. By default, populated with the primary Display Bio entered in the Constituent record.   |
| Display Date                        | The date when cross reference information began and ended. Populated with the values in the <i>Begin ISO Date</i> and <i>End ISO Date</i> fields . May be entered manually.  |
| Displayed                           | Controls whether a Constituent displays in a linked record.  |
| Prefix                              | A prefix that displays in front of the Constituent Display Name on a linked record, such as <i>Made by</i> .   |
| Remarks                             | Any notes or comments about a Constituent record as it relates to a linked record.   |
| Role                                | Describes the relationship between a constituent and a linked record, such as Artist, Manufacturer, Donor, or Organizer. The values available in this field are determined by the value selected in the <i>Role Type</i> field.  |
| Statement                           | Any statements by a constituent related to a linked record.  |
| Suffix                              | A suffix that displays after the constituent on a linked record, such as <i>Maker</i> .  |
| Constituent record fields           | Fields from the Constituent record itself will be also be accessible (Main Constituent Record) if the List View, Data Form, or widget is configured to do so.  |

For security settings, see **ConXRefs: Linked Constituent Fields** on the [Constituents Module Security](#) page.

# Linked Data (From Records Linked to Constituents)

In a Constituent record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Constituents Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**. For linked Objects, select the node labeled with the specific Role Type: Objects – Artist/Maker, Objects – Acquisition Related, Objects – Ex-Collection Related.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Media records are accessible in the [Main Constituent Record](#) in the [Linked Media References \(MediaXRef\)](#) widget. Select the top tree node to access them.

## Link-Related Fields

When a Constituent is linked to a record in another module, information is generated that pertains to the link.

The following fields pertain to the *link* between a Constituent record and a record from another module. These fields are not part of either the Constituent record or the linked record, and only exist when the records are linked.

- [Linked-Bibliography Data](#)
- [Linked-Media \(MediaXRef\) Data](#)
- [Linked-Constituent \(ConXRef\) Data](#)

# Associated Constituent Records

In the [Constituents Hierarchy Tree](#), select the node labeled with the relationship name (Parent Records, Child Record, or See Also Records) to access related fields in a read-only [List View](#).

# Constituents Hierarchy Tree

The **Constituents Hierarchy Tree** provides access to all [core Constituent data](#), including data that is linked from other modules.

The data that displays in the center panel is determined by the tree node that is selected. The main Constituent record is represented in the top node, with child nodes representing modules or types of Constituent data. Some child nodes have their own child nodes for individual records.

## Constituents Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Constituents Hierarchy Tree Layout

### Constituent Name (Top node)

Constituent Alternate Names

Constituent Name

Constituent Addresses

Address Type

Geography

Geography Type

Bibliography

(Heading + Title)

Media

Parent Records

Parent Relationship Name

Child Records

Child Relationship Name

See Also Records

See Also Relationship Name

Related Records (Constituent Related Summary)

Objects – Artist/Maker

Links User has Rights to Remove

Objects – Acquisition Related

Links User has Rights to Remove

Objects – Ex-collection Related

Links User has Rights to Remove

Object Rights

Links User has Rights to Remove

Bibliography

Exhibitions

Incoming Loans

Outgoing Loans

Media – Rendition-Related Constituents

Insurance Policies

Sites

Events

Venues

Shipments

Shipment Steps

# Add New Constituent Record



Before creating a new Constituent record users must first search TMS Collections to see if a Constituent record already exists. TMS Collections will allow the creation of duplicate Constituent records. In order to avoid this users must search the database before creating a Constituent Record.

To create a Constituent record, follow the steps to [add a new record](#) from the toolbar.

## Fields Required When Adding New Constituent Records

| Field        | Description  | Notes                             |
|--------------|--|-----------------------------------|
| Display Name | If the First Name, Family Name (Last Name), or Institution fields are populated, a drop down menu will allow the user to choose a Display Name. The Display Name field can also be typed into without populating the other fields. The Display Name chosen from the drop down may also be amended by typing directly into the field. |                                   |
| Alpha Sort   | If the First Name, Family Name (Last Name), or Institution fields are populated, a drop down menu will allow the user to choose the Alpha Sort. The Alpha Sort field can also be typed into without populating the other fields. The Alpha Sort chosen from the drop down may also be amended by typing directly into the field.     | Used to sort Constituent records. |

For security settings, see **Creating Constituent Records** on the [Constituents Module Security](#) page.

# Associate Constituent with Another Constituent

See [Associate \(Link\) Records from the Same Module](#).

# Batch Update Constituent Records

Updating a group (batch) of records can be performed on the following Constituent fields:

- Active
- [Attributes \(ThesXRefs\)](#)
- Constituent Type
- [Flex Field](#)
- [Flex Field Group](#)
- [Geography Xrefs \(ThesXRefs\)](#)
- [Public Access](#)
- [Text Entries](#)

To update a group (batch) of Constituent records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Constituent Records** on the [Constituents Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Delete Constituent Records

The process to [delete a record](#) is the same as in other modules.

When attempting to delete a Constituent record, the [Constituent Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Constituent must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Constituent Records** on the [Constituents Module Security](#) page.

# Constituent Usage Report

When deleting a Constituent record, its usage will display in a **Constituent Usage Report**.

In Constituent records, there are 2 different types of usage being reported: *References* and *Record Usage*.

**Record usage** is labeled with only the module name. It refers to records from other modules that are linked to the Constituent record as either a different (not ConXRef) type of link or in a field. If a Media record has a Constituent added as a Rendition-related Constituent, and a different Constituent in the Photographer field, the usage would be listed as "2 Constituent record(s)"

**References** are records (from other modules) that linked the Constituent record in the [Linked Constituent References \(ConXRefs\)](#) widget, or, in the case of Objects, from an option in the Objects Hierarchy Tree. If a Constituent record was added in the ConXRefs widget in an Exhibition record as an "Exhibition-Related Constituent, the usage would be listed as "1 Reference to Exhibitions"

All usages of a Constituent record will block its deletion and will display in **red**.

## Links to the following record(s) in other modules:

References to Loans

References to Object Value

References to Text Entries

References to Exhibition Venues Xrefs

References to Sites

References to Object Rights

References to Events

References to Media Renditions

References to Objects

References to Exhibitions

References to Insurance Policies

References to Bibliography

References to Shipments

## Related Constituent records:

Parent Constituent record(s)

Child Constituent record(s)

## Usage in other products:

If there is a valid license for other TMS Suite products, [or there was a previous license for TMS for Windows](#), the Usage report will list records from those products that are linked to the Constituent.

### TMS Conservation Studio

- Conservation Report record(s)
- Project record(s)

### TMS Media Studio

- Project record(s)

### TMS for Windows

- References to Circulation (Media module)

# Edit/View Constituent Records

Select a Constituent record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Constituents module: [Open Package records](#) (from the Package panel or Manage Package Folders).

The method for viewing and editing Constituent records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Constituent Records** on the [Constituents Module Security](#) page.

# Link Constituent to Records in Other Modules

Constituent records may be [linked to records in other modules](#).

Data that pertains to the link between the Constituent and the other record is considered part of the Constituent Main data ([data linked to Constituent from other modules](#)).

In the Constituent record, linking to records in other modules is performed by selecting the node labeled with the module name in the [Constituents Hierarchy Tree](#).

## Link Records in Another Module to the Current Constituent Record

From the Constituent record, the Constituent can be linked to records in other modules using several methods:

- The [Linked Media References \(MediaXrefs\) widget](#) to link Media records (select the top tree node)
- The **Link Bibliography** option in the Bibliography node
- The [Batch Link Constituent](#) feature for each module under the **Related Records** node

The following link-related nodes appear in the tree:

- Bibliography
- Media
- Related Records
- Objects - Artist/Maker
- Objects - Acquisition Related
- Objects - Ex-Collection Related
- Object Rights
- Related Records > Bibliography
- Related Records > Exhibitions
- Related Records > Events
- Related Records > Venues
- Related Records > Incoming Loans
- Related Records > Outgoing Loans
- Related Records > Insurance Policies
- Related Records > Media (as Rendition-related Constituent)
- Related Records > Shipment
- Related Records > Shipment Steps
- Related Records > Sites

## Unlink a Record

Follow the steps to [Unlink a record](#).

For security settings, see [ConXRefs \(1\)](#), [ConXRefs \(2\)](#) and [ConXRefs \(3\)](#) on the [Constituents Module Security](#) page.

# Batch Link Constituent to Records in Other Modules

In a Constituent record, there is an option to link the Constituent to a group (batch) of records in another module.

Using this method will create a Constituent Cross-Reference record - also known as a ConXRef record. It is not the same as linking a record to the Constituent in nodes labeled with a module name.

1. In a Constituent record, before linking to an Object record, the Constituent's [Role Type](#) in relation to the Object must be determined.
2. In the [Constituents Hierarchy Tree](#), select the node for the specific Role Type.
3. Select the node option **Batch Link Constituent**. The Batch Link Constituent window opens.
4. Select a [Role](#).
5. Select a **Department**.
6. Optional: check **Allow duplicate ConXrefs** to allow the constituent to be linked to the Object record(s) with the same role multiple times.
7. Select a **Search Method** for finding Objects (see below): *Find by Query*, *Find by Object Package*, or *Find by Object Working List*.
8. Perform a [Lookup](#) Search for Objects.
9. In the Search Results, select/check the row of the Object(s) to which the constituent should be linked.
10. Select **Add** or **Add All** (to link the constituent to all of the objects in the list).
11. The Status – Batch Link Constituent window opens and states how many of the links Completed, Failed, or were Not Authorized. Select **OK**.



Selecting **Cancel** at any time will close the Batch Link Constituent window without linking the Constituent to any Object records.

## Search Methods for Finding Object Records to Link

**Find by Query** will perform a Quick Search/Lookup Search to find Object records.

- a. Select a **Department** from the drop-down menu by checking the boxes next to each department to include in the object query. Use the checkbox on the left to select all departments. The checkbox on the right will de-select all departments. At least one department must be selected.
- b. To find the object by object number check the Search Only Module Number Field(s) checkbox and type the object number in the search box. Wildcard characters may be used. To find the object(s) using different criteria, type the word or phrase in the search box and click on the magnifying glass or press the Enter key. A [Custom Filter](#) may be selected from the drop-down menu.
- c. Follow steps 7 through 12 above.

**Find by Object Package** will return all Object records in a specific Package.

- a. The Package Search window opens. Follow the steps in the [Open a Package](#) chapter.
- b. Follow steps 7 through 12 above.

**Find by Object Working List** will return all records in the Object Working List. This can only be used if the user has an Object Working List in the Objects module.

- a. The list of Objects in the working list will display in the Batch Link Constituent window. Follow steps 7 through 12 above.

## Removing Constituent Links from Object Records

1. In the tree, select the node labeled with the Role Type.
2. Select the node option **Links User has Rights to Remove**. The linked Objects will display in a [List View](#).
3. Select/check the row for Object(s) from which the Constituent link should be removed.
4. Select the List View Option **Remove Selected Constituent Links**.
5. Select **Yes** to the prompt to remove the constituent links or **No** to cancel.



Removing a Constituent from a record only removes the link between the two records. The Constituent record is still in the database. However, there is no longer a link between the constituent and the Object record.

For security settings, see [ConXRefs \(1\)](#), [ConXRefs \(2\)](#) and [ConXRefs \(3\)](#) on the [Constituents Module Security](#) page.

# Constituent Roles and Role Types

When a Constituent record is linked to a record in a different module, a *Role* is selected for the Constituent.

A **Role** defines the relationship between the Constituent and the record. Each module has a preconfigured default Role that is used when a Constituent is linked. The Role may be modified in the [Linked Constituent References \(ConXRefs\)](#) widget.

A **Role Type** defines the type, or nature of, the relationship between the Constituent and the record. Every Role is assigned to a Role Type.

Each module is configured for the Roles available when linking a Constituent. Roles and Role Types are configured in the [Roles Authority](#) in the [TMS Suite Application Configuration Utility](#).

# Constituent Roles and Role Types for Linking Objects

Constituent records can be linked to records in the Objects module with the following [Role Types](#):

- **Object Related:** Constituents involved in the creation of the Object (Artist, Maker, Sitter, Conservator).
- **Acquisition Related:** Constituents involved in acquiring the Object (Donor, Owner, Dealer).
- **Ex-Collection Related:** The previous owner(s) of the Object (Previous Owner, Gallery/Owner, Collector)
- **Rights Related:** Constituents related to the copyright for an Object (Rights Holder, Executor of Estate, Licensee).

Roles and Role Types are configured in the [Roles Authority](#) in the [TMS Suite Application Configuration Utility](#).

## Object Roles (Role Type)

- Artist or Maker (Object-related)
- Sitter (Object-related)
- Art handler (Object-related)
- Conservator (Object-related)
- Donor (Acquisition-related)
- Funder (Acquisition-related)
- Previous owner (Ex-Collection-related)
- Rights holder (Object Rights-related)
- Executor of Estate (Object Rights-related)

# Navigate to records related to the Constituent

Navigation to records that are linked to the Constituent can be performed 2 ways:

[Toolbar option for records related to Constituent\(s\)](#)

[Opening records from a List View displaying linked records](#)

# Related Records (Toolbar) for Constituents

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Constituent record or the entire current record selection.

| Navigation option                                | Module             | Create link using  | View link other module   |
|--|--------------------|--|--|
| Bibliography                                     | Constituents       | <a href="#">Constituents Hierarchy Tree</a> > Bibliography node  | Not visible in Bibliography record.  |
| Loans  | Loans              | Constituents Hierarchy Tree > Related Records > Incoming Loans/Outgoing Loans nodes<br>or<br><a href="#">Primary Lender (Constituent) or Primary Borrower (Constituent) widget</a> in a <b>Loan</b> record | <a href="#">Loans Hierarchy Tree</a> > Constituents node or Primary Lender/Primary Borrower widget             |
| Media  | Media              | Constituents Hierarchy Tree > Media node or <a href="#">Related MediaXrefs widget</a>  | Not visible in Media record.   |
| Related Bibliography                             | Bibliography       | Constituents Hierarchy Tree > Related Records > Bibliography node<br>or<br><a href="#">Bibliography-Related Constituents widget</a> in a <b>Bibliography</b> record  | <a href="#">Bibliography Hierarchy Tree</a> > Bibliography-Related Constituents node or <a href="#">widget</a> |
| Related Events                                   | Events             | Constituents Hierarchy Tree > Related Records > Events<br>or<br><a href="#">Event-Related Constituents widget</a> in an <b>Event</b> record  | <a href="#">Events Hierarchy Tree</a> > Event-Related Constituents node or widget                              |
| Related Exhibition Venues                        | Exhibitions        | <a href="#">Exhibitions Hierarchy Tree</a> > Venues node   | Constituents Hierarchy Tree > Venues node  |
| Related Exhibitions                              | Exhibitions        | Constituents Hierarchy Tree > Related Records > Exhibitions<br>or<br><a href="#">Exhibition-Related Constituents widget</a> in an <b>Exhibition</b> record   | Exhibitions Hierarchy Tree > Constituents node or Exhibition-Related Constituents widget                       |
| Related Insurance Policies                       | Insurance Policies | Constituents Hierarchy Tree > Related Records > Insurance Policies<br>or<br><a href="#">Policy-Related Constituents widget</a> in an <b>Insurance Policy</b> record  | Policy-Related Constituents widget   |
| Related Objects as Maker/Artist/Sitter           | Objects            | Constituents Hierarchy Tree > Related Records > Objects - Artist/Maker<br>or<br><a href="#">Objects Hierarchy Tree</a> > Object Related Constituent Xrefs node or <a href="#">widget</a>                   | Objects Hierarchy Tree > Object Related Constituent Xrefs node or widget                                       |
| Related Objects As Previous Owners/Ex-Collection | Objects            | Constituents Hierarchy Tree > Related Records > Objects - Ex-collection Related<br>or<br>Objects Hierarchy Tree > Ex-Coll. Related Constituent Xrefs node or <a href="#">widget</a>                        | Objects Hierarchy Tree > Ex-Coll. Related Constituent Xrefs node or widget                                     |
| Related Objects As Source/Donor                  | Objects            | Constituents Hierarchy Tree > Related Records > Objects - Acquisition Related<br>or<br>Objects Hierarchy Tree > Acq. Related Constituent Xrefs node or <a href="#">widget</a>                              | Objects Hierarchy Tree > Acq. Related Constituent Xrefs node or widget   |
| Related Sites                                    | Sites              | Constituents Hierarchy Tree > Related Records > Sites<br>or<br><a href="#">Site-Related Constituents widget</a> in a <b>Site</b> record  | Site-Related Constituents widget   |

# Setting Constituent as Anonymous

Constituent names can be made anonymous to users when using certain roles and role types, such as donors that prefer to remain anonymous to most users.

The role types that can include the *Anonymity Requested* field are the Acquisition-Related and Ex-Collection Related role types in the Objects module. Roles within these role types must be configured for anonymity. Refer to the [Roles Authority](#) section for information about configuring roles for anonymity.

## Viewing Constituents with Anonymity Requested

For users that do not have rights to view constituents that have the *Anonymity Requested* box checked, an anonymity name, such as *Anonymous Donor* will display in place of the constituent's name on linked records. For users with rights to view constituents that have the *Anonymity Requested* box checked, the constituent's name will display on linked records as normal.

## Setting a Constituent as Anonymous

1. Open an Object record.
2. Navigate to the **Acq. Related Constituent Xrefs** or **Ex-Coll. Related Constituent Xrefs** node. Expand the desired node and select a Constituent name.
3. Navigate to a [Data Form \(Data Entry View\)](#) that includes the *Anonymity Requested* field (checkbox).
4. Select the box to check it.

Now, when the record is accessed by a user without anonymous constituent rights, the anonymous name displays in place of the constituent name.



Setting a linked Constituent as anonymous does not change Constituent record information, nor is the anonymity applied in other records where the constituent is linked.

For information on granting and managing anonymity rights, refer to the [Constituent Anonymity Rights](#) section.

For security settings, see **Constituent Anonymity: Setting Constituents as Anonymous (1) and (2)** on the [Constituents Module Security](#) page.

# Media

The Media module stores information about *digital* or *physical* media. Media records can be tracked, searched, and linked to records in other TMS Collections modules.

**Digital media** refers to digital files such as images, documents, video, audio files, or webpages. When a Media record is created for a digital media file, the files can be viewed, printed and downloaded from within TMS Collections and may also be opened in the appropriate program outside of TMS Collections.

**Physical media** refers to non-digital analog media such as slides, transparencies, prints, videotapes, or documents. Media records are created for physical media track and manage them in TMS Collections.

## Media Records

A Media record is rendered from a combination of data and one or more digital Media files. For *physical* media, there will be no digital Media files, but a record is still created using data.

A **Rendition Number** identifies the Media record, but not necessarily distinctly. This should be considered when [searching for records](#). When [adding a new Media record](#), a next consecutive Rendition Number may be generated to keep Rendition Numbers unique.

There are two options for creating Media Records: [add a single new Media record](#) or use [Media Importer](#) to create individual records for a batch of Media files.

A list of the fields available for viewing or editing in the Media module is in [Media data](#).

The [Media Hierarchy Tree](#) provides a hierarchical view of a Media record. It has functionality for adding data and linking and associating other records.

# Media Data

**Media** records have many categories of data directly related to the Media record itself. The core Media data is divided into the main (or module-level) [context](#), and multiple sub-categories, or sub-contexts.

The different contexts of a Media record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#), or a specific tree node.

## Media Contexts

| Context   | Node or Tree                        | Fields  |
|---|-------------------------------------|---|
| <a href="#">Main Media record</a>                 | Top node                            | Data in the main Media record and some sub-categories.  |
| <a href="#">Linked records from other modules</a> | Node labeled with module name       | Fields related to the link between the records; in some cases, the linked record itself may be edited   |
| <a href="#">Associated Media records</a>          | Node labeled with relationship name | Fields related to the relationship; for each type of relationship, records are in a read-only List View |

In some Media contexts, there may be buttons on a Data Form that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseum Lookup](#)). These widgets are not included on any field lists since they are not part of any record.

# Main Media Record

The main Media record is accessed by selecting the top node of the [Media Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the fields available belong to sub-categories, or sub-contexts, but do not require the selection of a separate tree node. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

## Media Record Fields

| Field                       | Description  | Context               | User Defined? | Authority Controlled? | On System Data Form? |
|-----------------------------|--|-----------------------|---------------|-----------------------|----------------------|
| Archival Catalogue Number   | An archival catalogue number assigned to a digital media file.   | Rendition /Media File | No            | No                    | Yes                  |
| Archival Filename           | An archival filename given to a digital media file.  | Rendition /Media File | No            | No                    | Yes                  |
| Archival ID Number          | An archival identification number given to a digital media file.   | Rendition /Media File | No            | No                    | Yes                  |
| Archival Sub-directory      | A sub-directory in which an archived digital media file is located on a volume.  | Rendition /Media File | No            | No                    | Yes                  |
| Archival Volume Name        | A volume name where an archived digital media file is located, such as the name of a hard drive.   | Rendition /Media File | No            | No                    | Yes                  |
| <a href="#">Attributes</a>  | Thesaurus controlled terms related to a Media record.  | Media /Attributes     | Yes           | Yes                   | No                   |
| <a href="#">Color Depth</a> | The color depth of a digital media file.   | Media File            | No            | Yes                   | No                   |
| Confidential                | Controls whether a media file is confidential. Users must have <a href="#">Functional Security</a> permission to view confidential media files.  | Media File            | No            | No                    | No                   |
| Department                  | The Media department to which a Media record is assigned. Media departments serve as the highest categorical level to which a Media record can belong, and control security. Example Media departments could be Reference, High Resolution, General, or Retired. | Media                 | No            | Yes                   | Yes                  |
| Duration (Seconds)          | The length of time for a video or sound file, in seconds.  | Media Renditions      | No            | No                    | No                   |
| File                        | The filename of a digital media file. Only enabled for digital files.<br>Located in the Server Side File Lookup widget   | Media File            | No            | No                    | Yes                  |
| Format                      | The file format of a digital media file.   | Media File            | No            | Yes                   | Yes                  |
| Lock Checksum               | Locks a file checksum to prevent it from being updated.  | Media File            | No            | No                    | No                   |
| Media Archival Type         | A media archival type for a digital media file, such as Disk, Network, or DVD.<br>In TMS Composer the widget is labeled as Archival Type ID.   | Media File            | No            | Yes                   | Yes                  |
| Media File Metadata         | All metadata that has been extracted from and/or embedded to a digital media file. The data is always read-only on a data form.  | Media File            | No            | No                    | Yes                  |
| Media File Content          | Only populated when working with digital document files. Text content that has been extracted from a document file is stored in this view. The data is always read-only on a data form.  | Media File            | No            | No                    | Yes                  |
| Media Status                | The status for a media rendition, such as Active, Reference, or Retired.<br>In TMS Composer the widget is labeled as MediaStatusID.  | Media Renditions      | No            | Yes                   | Yes                  |
| Media Status Date           | The date that the media status is updated.   | Media Renditions      | No            | No                    | Yes                  |
| Medium Type                 | The medium type for physical or digital media, such as image, video, document, film, or transparency.  | Media Renditions      | No            | Yes                   | Yes                  |
| Path                        | The TMS path where a digital media file is located. Only enabled for digital files.<br>Located in the Server Side File Lookup widget.  | Media File            | No            | Yes                   | Yes                  |

|   |   |                  |    |     |     |
|---|---|------------------|----|-----|-----|
| Photographer<br>Linked Constituent References (ConXRefs)                  | The person who took the photograph of the image linked to the Media rendition.<br><br><div style="border: 1px solid yellow; padding: 5px;"> When this field is populated, the constituent link will be added to <i>Rendition-Related Constituents - Display Media Renditions</i> with the Role Photographer.</div> | Media Renditions | No | Yes | Yes |
| Quality   | The quality of a media rendition.   | Media Renditions | No | No  | Yes |
| Quality Date  | The date that quality was assessed for a Media rendition.   | Media Renditions | No | No  | Yes |
| Rendition Date  | The date on which a digital Media rendition was created.  | Media Renditions | No | No  | Yes |
| Rendition Number  | An identifying number for a Media rendition, may be automatically populated or manually entered.  | Media Renditions | No | No  | Yes |
| Rendition Remarks   | Any notes about a Media rendition.  | Media Renditions | No | No  | Yes |
| <a href="#">Rendition-Related Constituents - Display Media Renditions</a> | Linked Constituent records for people involved with a Media rendition, such as the digitizer of an image.<br><br>In TMS Composer the widget is labeled as ConXRefs- Simple.   | Media Renditions | No | Yes | Yes |
| Requires Tiling   | Indicated that the media file must be processed to make it deep zoom-able.  | Media File       | No | No  | Yes |
| Semantic Type Name  | The name given to a semantic type. Semantic types can be used to categorize intellectual properties of a media file for use in eMuseum.<br><br>In TMS Composer the widget is labeled as SemanticTypeID.   | Media File       | No | Yes | No  |
| Technique   | The technique for creating the digital media file linked to a Media rendition, such as Direct Capture, or Scanned on flatbed scanner.   | Media Renditions | No | No  | No  |

# Linked Media (MediaXRef) Fields

A Media record is linked to records in other modules using the [Linked Media References \(MediaXRefs\)](#) widget, or, where available, the **Link Media Record** option in the Media node of the Record Hierarchy tree.

When the Media record and the other record are linked, there are fields specifically related to the link that are populated. These fields correspond to the *link* between the records, not the linked records themselves. Without the link, they do not exist.

## Accessing MediaXRef Fields

Once a Media record is linked to the current record, there are 3 ways to access the link-related fields. Each option includes both the link-related fields and, if configured, fields from the linked Media record itself.

- Read-only: **select the Media tree node** to view a list of all Media records linked to the current record. The fields display in a read-only [List View](#).
- In the Record Hierarchy tree, **under the Media node**, select a node labeled with the Rendition Number. The fields display in a [Data Form \(Data Entry View\)](#).
- In the [Linked Media References \(MediaXRefs\)](#) widget, select **Edit**. A pop-up displaying the fields opens.

| Field               | Description  |
|---------------------|--|
| Display in Report   | Indicates if the linked Media record may be displayed in reports on the Object.  |
| Primary Display     | Controls which linked Media record is the primary record for display. The thumbnail for the Media record marked as <b>Primary Display</b> displays in views and reports for the record to which it is linked. If only one Media record is linked, it is the primary display record by default. |
| Rank                | Numeric field used to rank linked Media records as they pertain to the current record. This field has no bearing on display order.   |
| Relation            | <i>Content will be provided in a future release.</i>   |
| Remarks             | Remarks regarding the Media record that are specific to the current record.  |
| Media record fields | Fields from the Media record itself (from Main Media Record) will be also be accessible if the List View, Data Form, or pop-up window has been configured to include them.   |

For security settings, see [Linked Media References \(MediaXRefs\)](#) on the [Standard Feature Widgets Security](#) page.

# Linked Data (From Records Linked to Media)

In a Media record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Media Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Constituent records are available in the [Main Media Record](#) in the [Linked Constituent References \(ConXRef\)](#) widget. Select the top tree node to access them.

## Link-Related Fields

In the Media record, by selecting the appropriate node in the tree, both the linked record and fields related to the link are accessible.

The following fields pertain to the *link* between a Media record and a record from another module. These fields are not part of the Media record or the linked record, and only exist when the records are linked.

- [Linked-Event Data\\*](#)
- [Linked-Constituent \(ConXRef\) Data](#)
- [Linked-Media \(MediaXRef\) Data](#)
- [Linked-Bibliography Data\\*](#)

\* The link must be created in the other module and a node for this module may not display until the first link is created.

# Data from Associated Media Records

In the [Media Hierarchy Tree](#), select the node labeled with the relationship name (Parent Records, Child Record, or See Also Records) to access related fields in a read-only [List View](#).

# Annotation records

When the image belonging to a Media record is marked or annotated, an **Annotation Record** is created for the marked image. The Annotation record can be searched for and opened the same as the original Media record.

Annotations are made to an image in the [Annotations Editor](#).

In order to see the Annotation records for a Media record, select **Edit** in the thumbnail image widget in the record. Any existing Annotation records will then display in a list beneath "Open Existing Annotation Record."

# Media Hierarchy Tree

The **Media Hierarchy Tree** provides access to all [core Media data](#), including data that is linked from other modules.

The data that displays in the center panel is determined by the tree node that is selected. The main Media record is represented in the top node, with child nodes representing modules or types of Media data. Some child nodes have their own child nodes for individual records.

## Media Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Media Hierarchy Tree Layout

### Media (top node)

Objects

(Object Number + Artist/Maker + Title + Object Display Date)

Events \*

Bibliography\*

Bibliography Title

Rendition-Related Constituents

Associated Media Records

Parents

Parent Relationship Name

Children

Child Relationship Name

See Also

See Also Relationship Name



Nodes marked with \* will only display if a link or association exists with the current Media record.

# Add New Media Record

Media can be added several ways:

[Add a new record](#) from the toolbar

In any module besides Media, from the [Linked Media widget \(MediaXRefs\)](#).

Regardless of the method used, there are fields required when adding new Media records.

## Fields Required When Adding New Media Records

| Field            | Description  | Notes   |
|------------------|--|---|
| Rendition Number | Rendition Number for new Media record.   | Automatically populated with the next sequential Rendition Number in the database, or may be manually entered.<br><br>The (...) button to the right of the field can be used to generate a sequential number that is appended to the end of the value in the <i>Rendition Number</i> field. |
| Department       | A list of Media Departments.   | A description of this field is available in the list of <a href="#">main Media record fields</a> .  |
| Physical/Digital | Indicates whether a physical or digital Media file will be used when creating the new record |   |
| Medium Type      | A list of preconfigured Medium Types.  | A description of this field is available in the list of <a href="#">main Media record fields</a> .  |
| Format           | A list of preconfigured Media Formats.   | Only enabled for digital files. A description of this field is available in the list of <a href="#">main Media record fields</a> .  |
| Select a File    | Select a digital file to link to the Media record.   | Only enabled for digital files.   |



If Digital is selected, then the **Select a File** button will become enabled.

1. Choose **Select a File**.
2. The Find File in a Configured Network Folder window will open with a list of network folders in the left panel.
3. A file can be located by selecting a folder or sub-folder in the folder list. Files matching the Medium and Format entered in the previous window will display in the lower right panel.
4. If the file name is known, enter it in the **Find in Folder** text box. Files matching the name provided will display in the lower right panel.
5. The file list can be filtered by selecting the *All files*, *Files in use*, or *Files not in use* radio button.
6. The file list in the lower right panel can be saved as a preference ★ so that frequently used files may be easily located.
7. Select a file from the list and choose **Select a File**. The window will close, and the Path and File names will be populated by the selection.
8. Select **Add**.

The new Media record will be created. It will load in [Data Entry display mode](#). Or, if the new record was created using the MediaXRefs widget, it will display in the widget.

For security settings, see **Creating Media Records** on the [Media Module Security](#) page.

# Associate Media Record with Another Media Record

See [Associate \(Link\) Records from the Same Module](#).

# Batch Update Media Records

Updating a group (batch) of records can be performed on the following Media record fields:

- [Attributes \(ThesXRefs\)](#)
- Department
- [Flex Field](#)
- [Flex Field Group](#)
- Media View Type
- [Public Access](#)
- [Status Flags](#)

To update a group (batch) of Media records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Media Records** on the [Media Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Delete a Media Record

The process to [delete a record](#) is the same as in other modules.

When attempting to delete a Media record, the [Media Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Media record must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Media Records** on the [Media Module Security](#) page.

# Media Usage Report

When deleting a Media record, its usage will display in a Media Usage Report. Any usage of the Media record that prevents it from being deleted will display in red.

In Media records, there are 2 different types of usage being reported: *Record Usage* and *References*.

**Record usage** is labeled with only the module name. It refers to records from other modules that are linked to the Media record as either a different (not MediaXRef) type of link or in a field. If a Media record has a Constituent added as a Rendition-related Constituent, and a different Constituent in the Photographer field, the usage would be listed as "2 Constituent record(s)"

**References** are records (from other modules) that linked the Media record in the [Linked Media References \(MediaXRefs\)](#) widget, or, in the case of Objects, from an option in the Object hierarchy tree. If a Media record was added in the MediaXRefs in an Exhibition record, the usage would be listed as "1 References to Exhibitions"

**References to Annotations** refer to Media records that were created as Annotations of the current record. Refer to [Annotation Editor](#).

## Media Record Usage in Other Media Records:

References to Annotations

## Media Record Usage Related to Other Modules:

Constituent record(s)

References to Loans

References to Constituents

References to Events

References to Conservation Reports

References to Objects

References to Crates

References to Exhibitions

References to Insurance Policies

References to Projects

References to Bibliography

References to Shipments

References to Sites

## Related Media records:

Parent Media record(s)

Child Media record(s)

## Usage in other products:

If there is a valid license for other TMS Suite products, or there was a previous license for **TMS for Windows**, the Usage report will list records from those products that are linked to the Media record.

### TMS Conservation Studio

- Project record(s)
- Conservation Report records

### TMS Media Studio

- Project record(s)

### TMS for Windows

- Any usage reported?



# Edit/View Media Records

Select a Media record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

Open [Media Working List](#) records

From the Media module: [Open Package records](#) (from the Package panel or Manage Package Folders).

The method for viewing and editing Media records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Media Records** on the [Media Module Security](#) page.

# Link Media to Records in Other Modules

Media records may be [linked to records in other modules](#).

Data that pertains to the link between the Media and the other record is considered part of the Media Main data ([data linked to Media from other modules](#)).

In the Media record, linking to records in other modules is performed by selecting the top node, or the node labeled with the module name in the [Media Hierarchy Tree](#).

## Link Records in Another Module to the Current Media Record

In a Media record, records from other modules may be linked to the Media record using several different methods:

- [Link an existing record](#)
- [Add a new record to link](#)
- To link Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget (select the top tree node)



The [Media cross-reference](#) widget is not available in a Media record. It is used in records in other modules to link Media records.

## Unlink a Record

Follow the steps to [Unlink a Record](#).

For security settings, see [Linking Records in Other Modules to Current Media Record](#) on the [Media Module Security](#) page.

# Navigate to Records Related to the Media Record

Navigation to records that are linked to the Constituent can be performed 2 ways:

[Toolbar option for records related to the Media record](#)

[Opening records from a List View displaying linked records](#)

# Related Records (Toolbar) for Media

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Media record or the entire current record selection.

| Navigation Option          | Module             | Create link using  | View link other module   |
|----------------------------|--------------------|--|--|
| Related Bibliography       | Bibliography       | <a href="#">Bibliography Hierarchy Tree</a> > Media node or <a href="#">Related MediaXRefs widget</a>  | Bibliography Hierarchy Tree > Media node or Related MediaXRefs widget                                  |
| Related Constituents       | Media              | <a href="#">Rendition-Related Constituents - Display Media Rendition widget</a> or <a href="#">Photographer widget</a>   | <a href="#">Constituents Hierarchy Tree</a> > Related Records > Media - Rendition-Related Constituents |
| Related Events             | Media or Events    | <a href="#">Media module Media Hierarchy Tree</a> > Top node OR <a href="#">Events module Events Hierarchy Tree</a> > Media node or Related MediaXRefs widget        | Events Hierarchy Tree > Media node or Related MediaXRefs widget  |
| Related Exhibitions        | Exhibitions        | Related MediaXRefs widget  | <a href="#">Exhibitions Hierarchy Tree</a> > Media node or Related MediaXRefs widget                   |
| Related Insurance Policies | Insurance Policies | <a href="#">Insurance Policies Hierarchy Tree</a> > Media node or Related MediaXRefs widget  | Insurance Policies Hierarchy Tree > Media node or Related MediaXRefs widget                            |
| Related Loans              | Loans              | <a href="#">Loans Hierarchy Tree</a> > Media node or Related MediaXRefs widget   | Loans Hierarchy Tree > Media node or Related MediaXRefs widget   |
| Related Objects            | Media or Objects   | Media Module <a href="#">Media Hierarchy Tree</a> > Objects node, or <a href="#">Objects module Objects Hierarchy Tree</a> > Media node or Related MediaXRefs widget | Objects Hierarchy Tree > Media node or Related MediaXRefs widget                                       |
| Related Shipments          | Shipping           | <a href="#">Shipping Hierarchy Tree</a> > Media node or Related MediaXRefs widget  | Shipping Hierarchy Tree > Media node or Related MediaXRefs widget                                      |
| Related Sites              | Sites              | <a href="#">Sites Hierarchy Tree</a> > Media or Related MediaXRefs widget  | Sites Hierarchy Tree > Media or Related MediaXRefs widget  |

# Working with Media Files and Images

TMS Collections has functionality for [comparing images](#), [creating annotations](#), and [downloading/uploading](#) media files.

# Annotation Editor

The **Annotations Editor** provides tools for marking or annotating a digital image. The modified image is saved as a Snapshot image file, and pertinent data is saved to an [Annotation Record](#).

## Select an Image for Annotation

An image may be selected for annotation from the *thumbnail image in the Media record*, or from the *Media Cross-Reference (MediaXRefs) widget* within a linked record.

- From a Media record: In the Media thumbnail image, select **Edit** .
- From the MediaXRefs widget in a linked record: In the MediaXRefs widget, select **Edit** . This opens "Edit Media Records." Select **Annotation Mode**.

This opens **Select Record to Edit**.

To create a **new Annotation**:

1. Select **Create a New Annotation**.
2. Select a **Department**, enter a **Rendition Number**, and select a **Paper Size**.
3. Optional: select an **Orientation**.
4. Optional: uncheck "If image is tiled, **use cached image** for Annotations" (default is checked)
5. Select **OK**.

To open an **existing Annotation** for modification (if any):

1. Select **Open an Existing Annotation** from the list of Annotation records.
2. Select **OK**.

The Annotations Editor will open.

 A **tiled** image is a large image that has been divided into tiles. Each tile, or portion of the image, is broken into a separate image of its own. The advantage of using the tiled image for annotations is that it will have a **Deep Zoom** option to zoom closer than what is allowed for a cached file. If deep zooming is not needed, then annotations may be made on a cached image, then instead of using the tile image.

## Using the Annotations Editor

The Annotations Editor has 3 main areas:

- Media Record Data
- Toolbar with [Annotating Tools](#)
- Image Workspace

## Saving the Annotation

When finished annotating the image, click  to save it and if desired, use the  button to lock it for editing. Users can also click  to download either a JPG or PNG of the annotation. When finished in the annotation editor, click the  in the top right corner to return to the record.

For security settings, see **Annotation Records** on the [Media Module Security](#) page.

# Annotating Tools

The Annotations Editor Toolbar contains the tools that are used on the image.



- **Select** : This tool allows users to select and then move annotation elements on the canvas. It is also used in conjunction with the Delete button to remove annotation elements



- **Move** : This tool allows users to pan around an image, click and drag to move the image around. This is especially useful when zooming in to high resolution images



- **Free-hand Line** : This tool allows users to draw a line (or series of lines) on the annotation canvas, click and drag to draw the line. The color, style, and weight can be controlled once the tool is selected

**COLOR**



**LINE STYLE**

2px



- **Closed Free-hand Line** : This tool is similar to the free-hand line but it will close the loop of the line. The color, style, and weight can be controlled once the tool is selected. Note that this tool can also fill the closed loop so pay attention to which style is chosen. There is also a fill density slider so that the loop can be filled, but the underlying image is still visible.

**COLOR**



**LINE STYLE**

2px



**FILL**

100%



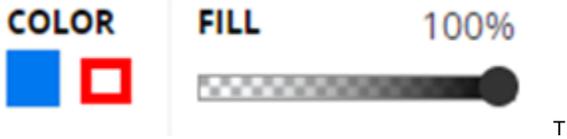
- **Rectangle** /**Ellipse** : These tools allow users to make either a structured box or ellipse on the canvas, click and drag to create. They have the same styling options as the Closed Free-hand Line



- **Line** /**Arrow** : Similar to the Free-hand Line tool, these options create a straight line based on the user's click and drag movement. In the case of the Arrow, the arrow points to the location toward which it is being dragged. They have the same styling options as the Free-hand Line tool



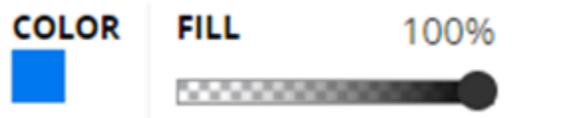
- **Sequential Number Pin** : This tool places an auto-incrementing number pin everywhere users click on the canvas. The border and fill colors as well as the fill density may be chosen



- Text : This tool allows users to write text anywhere on the canvas. Font, size, and color may be chosen



- Point : This tool allows users to place a point anywhere on the canvas. The point color and fill density may be chosen



- Stamp : This tool requires configuration in Composer (see [Annotation Key Formats](#)), it allows users to place a configured stamp anywhere on the canvas. As stamps are often text, the font, size and color may be chosen. The Stamp Authorities dropdown allows users to

choose from the configured stamps



- Delete : This is not a tool, but a button. Select an annotation element on the canvas, and click this button to delete it



- Undo /Redo : These buttons allow users to undo or redo the most recent change on the canvas

# Compare Images From Two Media Records

## Comparing Images

Users may compare up to **four** images using the [Media Working List](#).

1. Open the Media Working List by selecting the icon in the toolbar.
2. Add images to the list. Or, if images are already in the Media Working List, select the ones to compare by checking the boxes under each thumbnail. The **Select All** and **Deselect All** buttons can be used to select all or deselect all images for comparison.
3. Select **COMPARE**. The selected images display side-by-side in a new window.
4. Use the **zoom slider** under the individual images to zoom in and out. A high-resolution image that has been "tiled" (processed to make it deep zoom-able) may be zoomed in to see fine details.
5. Change between **Portrait** view and **Landscape** view by selecting the corresponding button in the top left corner.



Landscape view is better for viewing long, horizontal images, such as scrolls.

## Using the Overlay Feature

The Overlay feature can be used to compare two images.

1. Select two images from the Media Working List and choose **COMPARE**.
2. Select **OVERLAY** in the top left corner to layer the images on top of each other. The images will zoom in sync.
3. To select the active image and to control whether the images zoom independently or in sync, open the **Images Available for Comparison** panel at the bottom of the page by selecting the **arrow** at the lower left.
4. The images in the Media Working List will display, with the two in the Overlay outlined in blue. Selecting the **Layer** icon below one of the thumbnails sets it as the active one, that is, the image that can be dragged, independently re-sized, and made more or less transparent. This icon is blue for the active image and gray for the inactive image. The active image in the Overlay has a **Crossed-Arrow** icon at the lower right, which controls whether the active image zooms independently or whether the two images zoom in sync. When the icon is blue, only the active image will zoom. When it is black, both images zoom in sync.
5. To resize the active image to align with the bottom image, drag the active image, and resize it with the zoom slider at the lower right.
6. Once the images are well positioned, zoom the images in sync by selecting the **Crossed-Arrow** icon, changing it to black.
7. Close the lower panel to see more of the overlay, and use the **zoom slider** at the lower right to zoom the images in and out.



Occasionally, using the zoom slider will undo any size adjustments that have been made to the images before putting them into Overlay. If this happens, readjust the images and continue. This behavior is less frequent when the image on the right in the **Images Available for Comparison** panel is active.

8. Adjust the transparency of the active layer using the **transparency slider** at the lower left.
9. Select **CLOSE** in the top right corner to close the comparison window, or select **PORTRAIT** or **LANDSCAPE** in the top left corner to return to the side-by-side comparison mode.

# Download and Upload Media Files

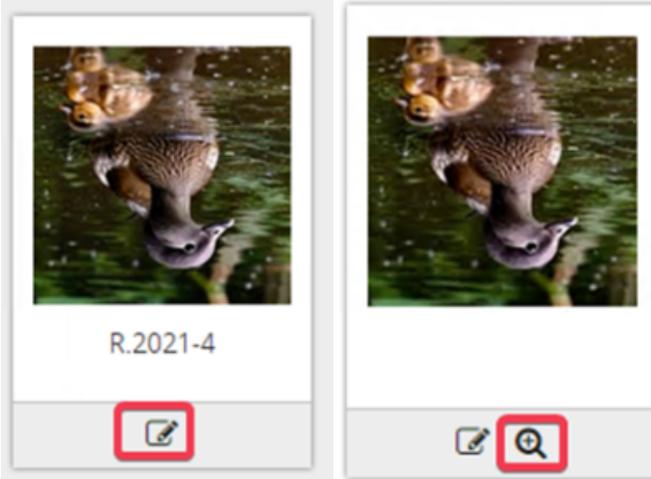
The File Upload Assistant allows users to download a media file, make changes to the file, and upload the new file to replace the original file.

## Using the File Upload Assistant

 This feature must be configured prior to use. See [File Upload Assistant Configuration](#).

This feature will only work for files that have been downloaded from a Media record in TMS Collections, so that is the first step.

1. Find a file that requires editing.
2. If the file is accessed from a module record to which the file is attached, select the **Edit** icon on the thumbnail image in the [Media Xrefs Widget](#). If the file is accessed from the Media record itself in the Media module, select the **Zoom** icon on the thumbnail image.



- 3.
4. Select **DOWNLOAD**.
5. Select **Copy of Original File** from the Image Size dropdown and tick the **Upload of Edited File is expected** box, then Download the file.
6. Edit and save the file.
7. Select **File Upload Assistant** in the [toolbar](#) of TMS Collections.
8. There may be many downloaded files in the list, use the filters at the top of the Assistant to find the appropriate file.

| File Name             | Download Source Path       | Download Date       | Upload Date         | Upload Expected                     |
|-----------------------|----------------------------|---------------------|---------------------|-------------------------------------|
| duck image 2.jpg      | \\WOPR\Media\Drag_and_Drop | 2021-01-29 07:48:43 |                     | <input checked="" type="checkbox"/> |
| duck image 2.jpg      | \\WOPR\Media\Drag_and_Drop | 2021-01-29 07:47:55 |                     | <input checked="" type="checkbox"/> |
| duck image 2.jpg      | \\WOPR\Media\Drag_and_Drop | 2021-01-29 07:10:45 | 2021-01-29 07:12:30 | <input checked="" type="checkbox"/> |
| IMG_1360_renamed.HEIC | \\WOPR\Media\Drag_and_Drop | 2021-01-29 06:56:46 |                     | <input checked="" type="checkbox"/> |

9. Highlight the file in the list
10. Drag the edited file into the **Replace File with New Upload** box (or use the Select a File option) and select **Upload**.
11. If the file was saved with a different name than the original file, users will be prompted as to whether they wish to keep that new filename (Rename File) or revert to the filename of the originally downloaded file (Use Downloaded File Name), choose appropriately.
12. A window opens asking if the user is sure they want to overwrite the modified file. Select **Yes** to continue.

The thumbnail image will be recreated from the new file and if the filename was changed it will be reflected on the Media record.

R.2021-4

General

\\WOPR\Media\Drag\_and\_Drop\duck image

2\_edited.jpg

JPEG

Image / Digital



For security settings, see **Downloading Images** and **File Upload Assistant** on the [Media Module Security](#) page.

# Media Importer

*Content for this page will be provided in a future release.*

For security settings, see **Media Importer** on the [Media Module Security](#) page.

# Manage Media Importer

*Content for this page will be provided in a future release.*

# Manage Working Folders

*Content for this page will be provided in a future release.*

# Crates

The Crates module is used to record and track containers and crates that are used for storing, moving, and shipping objects.

A list of the fields available for viewing or editing in the Crates module is in [Crate Data](#).

The [Crates Hierarchy Tree](#) provides a hierarchical view of a Crate record, and has functionality for adding data and linking and associating other records.

# Crate Data

**Crate** records have categories of data directly related to the Crate itself. The core Crate data is divided into the main (or module-level) [context](#), and multiple sub-categories, or sub-contexts.

The different contexts of a Crate record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#) or a specific tree node.

## Crate Contexts

| Context   | Node or Tree                      | Fields available in Data Form  |
|---|-----------------------------------|--|
| <a href="#">Main Crate record</a>                 | Top node                          | Data in the main Crate record and some sub-categories.   |
| <a href="#">Linked records from other modules</a> | Node labeled with the module name | Fields related to the link between the records; records are in a read-only <a href="#">List View</a> . |
| <a href="#">Crate Location History</a>            | Location History                  | List View of all locations entered for the crate.  |

In some Crate contexts, on the Data Form, there are widgets that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseumLookup](#)). These widgets are not included on any fields lists since they are not part of any record.

# Main Crate Record

The main Crate record is accessed by selecting the top node of the [Crates Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the fields available belong to sub-categories, or sub-contexts, but do not require the selection of a separate tree node. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

## Crate Record Fields

| Field                              | Description  | Context             | User Defined? | Authority Controlled? | On System Data Form?                |
|------------------------------------|--|---------------------|---------------|-----------------------|-------------------------------------|
| Active                             | Indicates that a crate is active.  | Crates              | No            | No                    | Yes                                 |
| Actual Crating Cost                | The actual cost of a crate.  | Crates              | No            | No                    | Yes                                 |
| Climate Controlled                 | Indicates that a crate is climate controlled.  | Crates              | No            | No                    | Yes                                 |
| Color                              | The color of a crate.<br><div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  Users can enter a term by typing directly into the field. This term will remain in the drop-down list and be available to all users.         </div>                         | Crates              | No            | No                    | Yes                                 |
| Condition                          | The condition of a crate.  | Crates              | No            | No                    | No<br>May be added to any Data Form |
| Container Number                   | A unique number assigned to a crate.   | Crates              | No            | No                    | Yes                                 |
| Crate Contents Abbrev.             | A brief description of the contents of a crate.  | Crates              | No            | No                    | No<br>May be added to any Data Form |
| Crate Dimensions                   | The dimensions of a crate.   | Crates              | No            | No                    | No<br>May be added to any Data Form |
| Crate Source                       | The entity from which a crate was obtained.<br><div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  Users can enter a term by typing directly into the field. This term will remain in the drop-down list and be available to all users.         </div> | Crates              | No            | No                    | Yes                                 |
| Crating Cost Paid By               | The entity who paid for a crate.   | Crates              | No            | No                    | Yes                                 |
| Date Made                          | The date on which a crate was made.  | Crates              | No            | No                    | Yes                                 |
| Description                        | A description of a crate.  | Crates              | No            | No                    | Yes                                 |
| Estimated Crating Cost             | The estimated cost of a crate.   | Crates              | No            | No                    | Yes                                 |
| Materials                          | The materials from which a crate is made.  | Crates              | No            | No                    | No<br>May be added to any Data Form |
| <a href="#">Related MediaXRefs</a> | Media Cross Reference Grid where Media records related to a crate can be linked.   | Crates /Media Xrefs | No            | No                    | Yes                                 |
| Oversize                           | Indicates that a crate is oversized.   | Crates              | No            | No                    | Yes                                 |
| Project                            | The project for which a crate is needed.   | Crate Projects      | No            | Yes                   | Yes                                 |
| Remarks                            | Notes about a Crate record.  | Crates              | No            | No                    | Yes                                 |
| Stackable                          | Indicates that a crate may be stacked.   | Crates              | No            | No                    | Yes                                 |
| Type                               | The type of crate, such as Carton, Standard Crate, Document Box, etc.  | Crate Types         | No            | Yes                   | Yes                                 |

# Crate Location History

In the [Crates Hierarchy Tree](#), select the node labeled **Location History** to access location related fields in a read-only [List View](#).

For security settings, see **Viewing Location History** on the [Crates Module Security](#) page.

# Linked Data (From Records Linked to Crates)

In a Crate record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Crates Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**. For linked Objects, select the node labeled Object Components.

## Link-Related Fields

When a Crate record is linked to a record from another module, information is generated that pertains to the link.

The following fields pertain to the *link* between a Crate record and records from other modules. These fields are not part of either the Crate record nor the linked record, and only exist when the records are linked.

- [Linked-Media \(MediaXRef\) Data](#)
- [Crate-Object Component Data](#)
- [Shipment-Crate Data](#)

*Additional content will be provided for this page in a future release.*

# Crate-Object Component Data

In the [Crates Hierarchy Tree](#), select the **Object Components** node. A list of all Object Components linked to the Crate will display in a read-only [List View](#). The list will contain fields pertaining to the Crate and the linked Object Component(s), including current and home locations.

## Object Component List View (read-only)

| Type of data          | Description   |
|-----------------------|---|
| Crate data            | Fields from the <a href="#">Main Crate Record</a>       |
| Object Component Data | Fields from the <a href="#">Object Component Record</a> |

For security settings, see **Viewing Object Components** on the [Crates Module Security](#) page.

# Crates Hierarchy Tree

The **Crates Hierarchy Tree** provides access to all [core Crate data](#), including data that is linked from other modules.

The data that displays in the center panel is determined by the tree node that is selected. The main Crate record is represented in the top node, with child nodes representing modules or types of Crate data.

## Crates Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Crates Hierarchy Tree Layout

### Shipment (top node)

Object Components

Shipments\*

Location History



Nodes marked with \* will only display if a link or association exists with the current Crate record.

# Add New Crate Record

To create a new Crate record, follow the steps to [add a new record](#) from the toolbar.

## Fields Required When Adding New Crate Records

| Field            | Description                                |
|------------------|--|
| Container Number | A number assigned to a container or crate. |

For security settings, see **Creating Crate Records** on the [Crates Module Security](#) page.

# Move a Crate

**Moving a Crate** is the recording of its physical relocation, similar to moving an Object or Object Component. The move becomes part of the Crate's Location History, and is accessible in the Location History node of the [Crates Hierarchy Tree](#).

A Crate is moved using the [Move Assistant](#), which is available in the [TMS Collections Toolbar](#).

When a Crate is moved to a location, it becomes available as a Target Location for moves of Components and Crates.

## Rules for Moving Crates

### Move a Crate Into Another Crate

In a Crate record, there is an option to move a smaller Crate into the current Crate:

- If the current Crate does not have an assigned Location yet, **move the Crate** to a location using the Move Assistant.
- In the top node of the [Crates Hierarchy Tree](#), select Move Crate to Crate.
- Search for a Crate (perform a [Lookup](#) search).
- Select a Crate and then choose **Add**. The Move Assistant will open, and the crate that was just selected will be in the **Crates/Containers To Move** list.
- Proceed following instructions for using [Move Assistant](#).

For security settings, see the following on the [Special Functions Security](#) page

- **Location and Movement: Accessing the Move Assistant**
- **Location and Movement: Moving a Single Object or Crate**
- **Location and Movement: Moving Objects or Crates to External Locations**

# Batch Update Crate Records

Not currently available.

# Delete Crate Records

The process to [delete a record](#) is the same as in other modules.

When attempting to delete a Crate record, the [Crate Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Crate must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Crate Records** on the [Crates Module Security](#) page.

# Crate Usage Report

When deleting a Crate record, its usage will display in a Crate Usage Report. Any usage of the Crate record that prevents it from being deleted will display in red.

Current Record is in use and cannot be deleted.

This Crate is used in at least one Shipment and cannot be deleted.

(x Number of) References to Location of the Component

# Edit/View Crate Records

Select a Crate record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Crates module: [Open Package Records](#) (from the Package panel or Manage Package Folders).

The method for viewing and editing Crate records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Crate Records** on the [Crates Module Security](#) page.

# Link Crate to Records in Other Modules

Crate records may be [linked to records in other modules](#).

Data that pertains to the link between the Crate and the other record is considered part of the Crate Main data ([data linked to Crate from other modules](#)).

In the [Crates Hierarchy Tree](#), data from linked modules displays in read-only [List Views](#).

## Link a Crate Record to Records in Another Module

Crate records may be linked to records from other modules using several different methods:

- To link a Crate to a Shipment, add a Crate while recording [Shipment Steps](#) in the **Shipping module**
- To link Media records, use the [Linked Media References \(MediaXRefs\)](#) widget (select the top tree node) in the **Crates module**
- To link an Object record, [Move Object to Crate](#) in the **Objects module** or **Crates module**

## Unlink a Record

Follow the steps to [Unlink a record](#).

For **security settings**, see linked pages above.

# Navigate to Records Related to the Crate

Navigation to records that are linked to the Crate can be performed 2 ways:

[Toolbar option for records related to Crate\(s\)](#)

[Opening records from a List View displaying linked records](#)

# Related Records (Toolbar) for Crates

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Crate record or the entire current record selection.

| Navigation Option | Module   | Create link using   | View link other module   |
|-------------------|----------|---|--|
| Related Media     | Media    | <a href="#">Crates Hierarchy Tree</a> > <a href="#">Related MediaXrefs widget</a>                                       | Not visible in Crate record.   |
| Related Objects   | Objects  | <a href="#">Move Assistant</a> in the Objects module, or <a href="#">Crates Hierarchy Tree</a> > Object Components node | Objects Hierarchy Tree > Object > Components > Component > Location History node |
| Related Shipments | Shipping | <a href="#">Shipment Steps Hierarchy Tree</a> > Step node or Unloaded Crates node                                       | <a href="#">Crates Hierarchy Tree</a> > Shipments node                           |

# Bibliography

The Bibliography module is used to record and track information for Bibliography references, such as books, exhibition related publications, or magazines. In Bibliography module records, objects related to a Bibliography reference can be linked to the corresponding Bibliography record.

Bibliography records can also be linked to related records from other modules, such as the Sites and Media modules, and information about the relationship can be recorded.

A list of the fields available for viewing or editing in the Bibliography module is in [Bibliography Data](#).

The [Bibliography Hierarchy Tree](#) provides a hierarchical view of a Bibliography record, and has functionality for adding data and linking and associating other records.

# Bibliography Data

**Bibliography** records have many categories of data directly related to the Bibliography record itself. The core Bibliography data is divided into the main, or module-level [context](#), and multiple sub-categories, or sub-contexts.

The different contexts of a Bibliography record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#), or a specific tree node.

## Bibliography Contexts

| Context   | Node or Tree                        | Fields  |
|---|-------------------------------------|---|
| <a href="#">Main Bibliography Record</a>          | Top node                            | Data in the main Bibliography record and some sub-categories  |
| <a href="#">Linked records from other modules</a> | Node labeled with module name       | Fields related to the link between the records; in some cases, the linked record itself may be edited   |
| <a href="#">Associated Bibliography records</a>   | Node labeled with relationship name | Fields related to the relationship; for each type of relationship, records are in a read-only List View |

In some Bibliography contexts, there may be buttons on a Data Form that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseumLookup](#)). These widgets are not included on any field lists since they are not part of any record.

# Main Bibliography Record

The main Bibliography record is accessed by selecting the top node of the [Bibliography Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the fields available belong to sub-categories, or sub-contexts, but do not require the selection of a separate node or tree. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

## Bibliography Record Fields

| Field   | Description   | Context                           | User Defined? | Authority Controlled? | On System Data Form?   |
|---|---|-----------------------------------|---------------|-----------------------|--|
| # of Pages  | The total number of pages included in a Bibliography reference.   | Bibliography                      | No            | No                    | Yes  |
| <a href="#">Alternate Numbers</a>                 | An alternate number associated with a Bibliography reference, such as a previous Reference Number, or the number for a Bibliography reference in a separate database.   | Bibliography /Alternate Numbers   | No            | No                    | Yes  |
| <a href="#">Attributes</a>                        | Thesaurus controlled terms linked to a Bibliography record.   | Bibliography /Attributes          | Yes           | Yes                   | Yes  |
| <a href="#">Bibliography-Related Constituents</a> | Linked Constituent record(s) for the people or entities related to a Bibliography reference, such as an Author, Publisher, or Contributor.  | Bibliography-Related Constituents | No            | Yes                   | Yes  |
| Copyright   | Copyright information for a Bibliography reference.   | Bibliography                      | No            | No                    | Yes  |
| Date  | Date entries related to a Bibliography reference, such as the date of a newspaper or magazine.  | Bibliography                      | No            | No                    | Yes  |
| Department  | The Bibliography department to which a Bibliography record is assigned. Bibliography departments serve as the highest categorical level to which a Bibliography record can belong, and control security.  | Bibliography                      | No            | Yes                   | Yes  |
| Edition   | An edition of a Bibliography reference.   | Bibliography                      | No            | No                    | Yes  |
| <a href="#">Flex Fields</a>                       | Flex Fields are "flexible" or user-created fields that are configured in the TMS Suite Application Configuration Utility. All <b>ungrouped</b> flex fields for a record display together in a "container."<br><br><b>Grouped</b> Flex Fields are related and can include workflow and approval information. A Flex Field group displays in its own container.   | Bibliography Flex Field Xrefs     | Yes           | No                    | No; may be added to any Data Form using <a href="#">TMS Composer</a> |
| Format  | The format of a Bibliography reference, such as a Book, Magazine, or Journal.   | Bibliography                      | No            | Yes                   | Yes  |
| Heading   | A reference or subject heading for a Bibliography reference.  | Bibliography                      | No            | No                    | Yes  |
| <a href="#">Historical Dates</a>                  | Date entries related to a Bibliography record other than the values in the <i>Begin Search Date</i> and <i>End Search Date</i> fields. Historical dates refer to past dates that are important to a Bibliography reference's history.   | Bibliography Dates                | No            | No                    | Yes  |
| Journal   | A name for a journal being referenced, such as the name of a newspaper or magazine.   | Bibliography                      | No            | No                    | Yes  |
| Language  | The language in which a Bibliography reference is written.  | Bibliography                      | No            | Yes                   | Yes  |
| <a href="#">Media XRefs</a>                       | Where Media records related to a Bibliography reference can be linked.  | Bibliography /MediaXrefs          | No            | No                    | Yes  |
| Place Published                                   | The location where a Bibliography reference was published.  | Bibliography                      | No            | No                    | Yes  |
| Public Access                                     | Indicates if a Bibliography record is available to be used on an institution's website.   | Bibliography                      | No            | No                    | Yes  |
| Reference Number                                  | A unique identifying number for a Bibliography record.<br><br>The (...) button may be used to generate a sequential number that will append to the end of the text string typed.<br><br>The <i>Bibliography.CallNumber.AllowDuplicates</i> setting in the <a href="#">TMS Suite Application Configuration Utility</a> determines if <i>Reference Number</i> field values must be unique or if they can be duplicated. | Bibliography                      | No            | No                    | Yes  |
| Series  | A series to which a Bibliography reference belongs.   | Bibliography                      | No            | No                    | Yes  |
| <a href="#">Single-Value Text Entry</a>           | User-defined fields that provide the option to save formatted text. Only a single field can be entered.   | Bibliography /Text Entries        | Yes           | No                    | No; may be added to any Data Form using <a href="#">TMS Composer</a> |

|                |   |                            |     |     |     |
|----------------|---|----------------------------|-----|-----|-----|
| Status Flags   | Short text alerts that may be added to records.           | Bibliography /Status Flags | Yes | Yes | Yes |
| Sub-Title      | A secondary title for a Bibliography reference.           | Bibliography               | No  | No  | Yes |
| Text Entries   | Text entries related to a Bibliography reference.         | Bibliography /Text Entries | Yes | No  | Yes |
| Title          | A title for a Bibliography reference.                     | Bibliography               | No  | No  | Yes |
| Volume         | A volume in which a Bibliography reference belongs.       | Bibliography               | No  | No  | Yes |
| Year Published | The year in which a Bibliography reference was published. | Bibliography               | No  | No  | Yes |

# Linked Bibliography Fields

In other modules, when a Bibliography record is linked, there are specific fields that are populated - they are related to the link between the records. They are independent of the records themselves.

To view these fields in the other (non-Bibliography) record:

Select the **Bibliography** tree node. A list of all linked Bibliography records will display in a read-only [List View](#).

Select a node labeled with the **Bibliography record identifier (Heading + Title)**. The fields listed below will display in a [Data Form \(Data Entry View\)](#) in addition to fields from the Bibliography record itself.

| Field                      | Description  |
|----------------------------|--|
| Catalogue Number           | A number used to identify the linked Object record in a publication (each linked Bibliography record).             |
| Figure Number              | The figure number for a linked object in a publication (each linked Bibliography record).                          |
| Illustrated                | Indicates if a linked object is illustrated in a publication (each linked Bibliography record).                    |
| Other References           | Any additional references to a linked object in a publication (each linked Bibliography record).                   |
| Page Number                | The page(s) in a publication where a linked object is mentioned or illustrated (each linked Bibliography record).  |
| Remarks                    | Any remarks about the citation of a linked object in a publication (each linked Bibliography record).              |
| Bibliography record fields | Fields from the Bibliography record itself will be also be accessible ( <a href="#">Main Bibliography Record</a> ) |

For security settings, see **Linked Bibliography Fields** on the [Bibliography Module Security](#) page.

# Linked Data (From Records Linked to Bibliography)

In a Bibliography record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Bibliography Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Constituent and Media records are also available in the [Main Bibliography Record](#) in the [Linked Constituent References \(ConXRef\)](#) and [Linked Media References \(MediaXRef\)](#) widgets. Select the top tree node to access them.

## Link-Related Fields

When a Bibliography record is linked to records in other modules, information is generated that pertains to the link.

The following fields pertain to the *link* between a Bibliography record and a record from another module. These fields are not part of either the Bibliography record or the linked record, and only exist when the records are linked.

- [Linked-Constituent \(ConXRef\) Data](#)
- [Linked-Media \(MediaXRef\) Data](#)

# Associated Bibliography Records

In the [Bibliography Hierarchy Tree](#), select the node labeled with the relationship name (Parent Records, Child Record, or See Also Records) to access related fields in a read-only [List View](#).

# Bibliography Hierarchy Tree

The **Bibliography Hierarchy Tree** provides access to all [core Bibliography data](#), including data that is linked from other modules.

The data that displays in the center panel is determined by the tree node that is selected. The main Bibliography record is represented in the top node, with child nodes representing modules or types of Bibliography data. Some child nodes have their own child nodes for individual records.

## Bibliography Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Bibliography Hierarchy Tree Layout

### Bibliography (top node)

Objects

(Object Number + Artist/Maker + Object Name + Title + Object Display Date)

Exhibitions\*

(Exhibition Title + Exhibition Begin Year)

Sites\*

Site Name

Bibliography-Related Constituents\*

(Constituent Name + Role)

Parent Records\*

Parent Relationship Name

Child Records\*

Child Relationship Name

See Also Records\*

See Also Relationship Name

Media

(Rendition Number + Media Type + File Name)



Nodes marked with \* will only display if a link or association exists with the current Bibliography record.

# Add New Bibliography Record

To create a new Bibliography record, follow the steps to [add a new record](#) from the toolbar.

## Fields Required When Adding New Bibliography Records

| Field | Description                           | Notes |
|-------|---------------------------------------|-------|
| Title | A title for a Bibliography reference. |       |

For security settings, see **Creating Bibliography Records** on the [Bibliography Module Security](#) page.

# Associate Bibliography with Another Bibliography

See [Associate \(Link\) Records from the Same Module](#).

# Batch Update Bibliography Records

Updating a group of records can be performed on the following Bibliography record fields:

- [Flex Field](#)
- [Flex Field Group](#)
- [Status Flags](#)
- [Text Entries](#)
- [Attributes \(ThesXRefs\)](#)

To update a group (batch) of Bibliography records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Bibliography Records** on the [Bibliography Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Delete Bibliography Records

The process to [delete a record](#) is the same as in other modules.

When attempting to delete a Bibliography record, the [Bibliography Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Bibliography must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Bibliography Records** on the [Bibliography Module Security](#) page.

# Bibliography Usage Report

When deleting a Bibliography record, its usage will display in a Bibliography Usage Report. Any usage of the Bibliography record that prevents it from being deleted will display in **red**.

## Links to the following record(s) in other modules

Constituent record(s) (ConXRefs)

Object record(s)

Event record(s)

Site record(s)

Exhibition record(s)

Media record(s) (MediaXRefs)

## Related Bibliography records

Parent Bibliography record(s)

Child Bibliography record(s)

See Also record(s)

## Usage in Other TMS Products

If there is a valid license for other TMS Suite products, or there was a previous license for **TMS for Windows**, the Usage report will list records from those products that are linked to the Bibliography record.

### TMS Conservation Studio

- [Project record\(s\)](#)
- [Conservation Report records](#)

### TMS Media Studio

- [Project record\(s\)](#)

# Edit/View Bibliography Records

Select a Bibliography record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Bibliography module: [Open Package records](#) (from the Package panel or Manage Package Folders).

The method for viewing and editing Bibliography records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Bibliography Records** on the [Bibliography Module Security](#) page.

# Link Bibliography to Records in Other Modules

Bibliography records may be [linked to records in other modules](#).

Data that pertains to the link between the Bibliography and the other record is considered part of the Bibliography Main data ([data linked to Bibliography from other modules](#)).

In the Bibliography record, linking to records in other modules is performed by selecting either the top node, or the node labeled with the module name in the [Bibliography Hierarchy Tree](#).

## Link Records in Another Module to the Current Bibliography Record

In a Bibliography record, records from other modules may be linked to the Bibliography using several different methods:

- [Link an existing record](#)
- [Add a new record to link](#)
- To link Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget (select the top tree node)
- To link Media records, use the [Linked Media References \(MediaXRefs\)](#) widget (select the top tree node)
- To link Object records, additional options are [Linking Objects using Package or Object Working List](#)

## Unlink a Record

Follow the steps to [Unlink a record](#).

For security settings, see [Linking Sites to Bibliography Records](#) and [Linking Objects to Bibliography Records](#) on the [Bibliography Module Security](#) page.

# Navigate to Records Related to the Bibliography

Navigation to records that are linked to the Bibliography record can be performed 2 ways:

[Toolbar option for records related to Bibliographies](#)

[Opening records from a List View displaying linked records](#)

## Related Records (Toolbar) for Bibliography

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Bibliography record or the entire current record selection.

| Navigation Option                 | Module       | Create link using  | View link other module   |
|-----------------------------------|--------------|--|--|
| Bibliography-Related Constituents | Constituents | Bibliography-Related Constituents <a href="#">widget</a> or <a href="#">Constituents Hierarchy Tree</a> > Related Records > Bibliography | Constituents Hierarchy Tree > Related Records > Bibliography   |
| Related Exhibitions               | Exhibitions  | <a href="#">Exhibitions Hierarchy Tree (Complete)</a> > Top node or Bibliography node  | <a href="#">Exhibitions Hierarchy Tree</a> > Bibliography node |
| Related Media                     | Media        | Bibliography Hierarchy Tree > Media node or <a href="#">Related MediaXrefs widget</a>  | <a href="#">Media Hierarchy Tree</a> > Bibliography node       |
| Related Objects                   | Objects      | <a href="#">Bibliography Hierarchy Tree</a> > Objects node   | <a href="#">Objects Hierarchy Tree</a> > Bibliography node     |
| Related Sites                     | Sites        | Bibliography Hierarchy Tree > Top node or Sites node   | <a href="#">Sites Hierarchy Tree</a> > Bibliography node       |

# Events

The Events module is used to record information about current and historical events, such as lectures, school visits, meetings, exhibition related events, an event that occurred at a particular site in the past, or an event that relates to the history of an object. Events may have linked Sub Events, and can also be linked to records in other modules, and information about the relationship can be recorded.

A list of the fields available for viewing or editing in the Events module is in [Event Data](#).

The [Events Hierarchy Tree](#) provides a hierarchical view of an Event record, and has functionality for adding data and linking and associating other records.

# Event Data

**Event** records have many categories of data directly related to the Event itself. The core Event data is divided into the main (or module-level) [context](#), and multiple sub-categories, or sub-contexts.

The different contexts of an Event record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#) or a specific tree node.

## Event Contexts

| Context  | Node or Tree                  | Fields available in Data Form   |
|--|-------------------------------|---|
| <a href="#">Main Event record</a>                  | Top node                      | Data in the main Event record and some sub-categories   |
| <a href="#">Event Geography</a>                    | Geography node                | Geography fields  |
| <a href="#">Linked records from other modules</a>  | Node labeled with module name | Fields related to the link between the records; in some cases, the linked record itself may be edited |
| <a href="#">Data from linked Sub Event records</a> | Sub Events                    | Data from the linked Sub Event displays in a Data Form and may be edited                              |

In some Event contexts, on the Data Form, there are widgets that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseumLookup](#)). These widgets are not included on any fields lists since they are not part of any record.

# Main Event Record

The main Event record is accessed by selecting the top node of the [Events Record Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the available fields belong to sub-categories, or sub-contexts of Objects, but do not require the selection of a separate node or tree. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

## Event Record Fields

| Field                                      | Description   | Context                    | User Defined? | Authority Controlled? | On System Data Form? |
|--|---|----------------------------|---------------|-----------------------|----------------------|
| Active                                     | Indicates if an event is active.  | Events                     | No            | No                    | Yes                  |
| All Day                                    | Indicates if an event lasts all day. The values in the <i>Begin Time</i> and <i>End Time</i> fields update when this box is checked.<br><br><div style="border: 1px solid orange; padding: 5px; margin-top: 10px;">  The values that populate the Begin Time and End Time fields when the All Day box is checked is determined by the Events.AllDay.BeginTime and Events.AllDay.EndTime settings in the TMS Database Configuration Utility. </div> | Events                     | No            | No                    | Yes                  |
| <a href="#">Attributes</a>                 | Thesaurus controlled terms related to an event.   | Events /Attributes         | Yes           | Yes                   | Yes                  |
| Begin Date and Time                        | The begin search date and time for an event.  | Events                     | No            | No                    | Yes                  |
| Citation                                   | A citation for an event. May be used for things such as websites, marketing, or press purposes.   | Events                     | No            | No                    | Yes                  |
| Date Label                                 | The date of an event. May include text.   | Events                     | No            | No                    | Yes                  |
| Department                                 | The Event department to which an Event record is assigned. Event departments serve as the highest categorical level to which an Event record can belong, and control security. Example Event departments could be Excavation, Historical Event, or Internal Event.  | Events                     | No            | Yes                   | Yes                  |
| Description                                | A narrative description of an event.  | Events                     | No            | No                    | Yes                  |
| End Date and Time                          | The end search date and time for an event.  | Events                     | No            | No                    | Yes                  |
| Event Alpha Sort                           | A unique sort value for an Event record. Controls the sort of Event records when queried. Auto-populated by default, but may be altered.  | Events                     | No            | No                    | Yes                  |
| Event Name                                 | A unique name for an event.   | Events                     | No            | No                    | Yes                  |
| Event Type                                 | The type of event. May be used to further contextualize the assigned Event department.  | Events                     | No            | Yes                   | Yes                  |
| <a href="#">Flex Fields</a>                | Flex Fields are “flexible” or user-created fields that are configured in the <a href="#">TMS Suite Application Configuration Utility</a> . All <b>ungrouped</b> flex fields for a record display together in a “container.”<br><br><b>Grouped</b> Flex Fields are related and can include workflow and approval information. A Flex Field group displays in its own container.  | Events Flex Field Xrefs    | Yes           | No                    | No                   |
| <a href="#">Event-Related Constituents</a> | Linked Constituent records for people or entities related to an event, such as an Organizer, Performer, Sponsor, or Vendor.   | Event-Related Constituents | No            | Yes                   | Yes                  |
| <a href="#">Geography</a>                  | Non-thesaurus controlled geography entries related to an event.   | Event Geography            | No            | No                    | Yes                  |
| <a href="#">Geography Xrefs</a>            | Thesaurus controlled geography terms related to an event.   | Events /Geography Xrefs    | Yes           | Yes                   | Yes                  |
| Location                                   | A linked Location record where an event will or did occur.<br><br><div style="border: 1px solid orange; padding: 5px; margin-top: 10px;">  The values in this field are linked from the Locations Authority and are not related to Site records. </div>  | Events                     | No            | Yes                   | Yes                  |

|   |   |                      |     |    |     |
|---|---|----------------------|-----|----|-----|
| <a href="#">Media XRefs</a>             | Where Media records related to an Event can be linked.  | Events /Media Xrefs  | No  | No | Yes |
| Meeting                                 | Indicates if an Event record is for a meeting.  | Events               | No  | No | Yes |
| Organizational Credit Line              | A credit line provided by an event organizer.   | Events               | No  | No | Yes |
| Public Access                           | Controls whether an Event record is available to be used on an institution's website.                   | Events               | No  | No | Yes |
| <a href="#">Single-Value Text Entry</a> | User-defined fields that provide the option to save formatted text. Only a single field can be entered. | Events /Text Entries | Yes | No | No  |
| Sponsor Credit Line                     | A credit line provided by an event sponsor.   | Events               | No  | No | Yes |
| Sub-Title                               | A sub title/name for an event.  | Events               | No  | No | Yes |
| <a href="#">Text Entries</a>            | Text entries related to an Event.   | Events /Text Entries | Yes | No | Yes |

# Event Geography

Event Geography fields are in the **Event Geography context**, or sub-category.

Selecting the **Geography node** in the [Events Hierarchy Tree](#) displays a list of all Geography Types assigned to an Event. Selecting an individual node labeled with a Geography Type will display its [Geography Fields](#) in a [Data Form \(Data Entry View\)](#).

For security settings, see **Event Geography** on the [Events Module Security](#) page.

# Linked Data (From Records Linked to Events)

In an Event record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Events Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Constituent and Media records are also available in the [Main Event Record](#) in the [Linked Constituent References \(ConXRef\)](#) and [Linked Media References \(MediaXRef\)](#) widgets. Select the top tree node to access them.

## Link-Related Fields

When an Event is linked to records in other modules, information is generated that pertains to the link.

The following fields pertain to the *link* between an Event record and a record from another module. These fields are not part of either the Event record or the linked record, and only exist when the records are linked.

- [Linked-Bibliography Data](#)
- [Linked-Constituent \(ConXRef\) Data](#)
- [Linked-Media \(MediaXRef\) Data](#)

# Linked Event Fields

*Content for this page will be provided in a future release.*

# Data from Linked Sub Events

*Content for this page will be provided in a future release.*

# Events Hierarchy Tree

The **Events Hierarchy Tree** provides access to all [core Event data](#), including data that is linked from other modules.

The data that displays in the center panel is determined by the tree node that is selected. The main Event record is represented in the top node, with child nodes representing modules or types of Event data. Some child nodes have their own child nodes for individual records.

## Events Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Events Hierarchy Tree Layout

### Event (top node)

Sub Events\*

Event Name

Ascendant Events\* ([List View](#) of all parent Event records. Will only display on Sub Event records)

Objects

(Object Number + Artist/Maker + Object Name + Title + Object Display Date)

Bibliography

(Title)

Exhibitions\*

Exhibition Title

Geography

Geography Type

Bibliography

(Heading + Title)

Sites\*

(Site Number + Site Name)

Event-Related Constituents\*

Media

(Rendition Number + Media Type + File Name)



Nodes marked with \* will only display if a link or association exists with the current Event record.

# Add New Event Record

Events can be added several ways:

[Add a new record](#) from the toolbar.

[Link a Sub Event](#) to the current one.

[Link a new Event](#) to a record in another module.

Regardless of the method used, there are fields required when adding new Event records.

## Fields Required When Adding New Event Records

| Field      | Description                 | Notes   |
|------------|-----------------------------|---|
| Department | A list of Event Departments | A description of this field is available in the list of <a href="#">main Event record</a> fields. |
| Event Name | A unique name for an Event. |   |

For security settings, see **Creating Event Records** on the [Events Module Security](#) page.

# Linking a Sub Event to an Event

**Sub Events** are events that occur within or relate to another, larger event. Sub Event records can be linked or created from the [Events Hierarchy Tree](#).

1. In the tree, select the **arrow** to the right of the top node and choose **Link Sub Event**.
2. Select either **New Event** or **Existing Event**.
3. If **New Event** is chosen, the Add New Event window opens, enter the [required fields](#).
4. If **Existing Event** is chosen, follow the steps to [link an existing record](#).



Event records linked to Exhibition records cannot be linked as Sub Events.

## Sub Event Fields

When a Sub Event is selected in the tree, fields about the Sub Event display in a [Data Form \(Data Entry View\)](#). The fields are the same for Sub Events as they are for Events. Refer to [Main Event Record](#) for information about these fields.

## Unlinking a Sub Event Record

1. In the tree, select a Sub Event.
2. Click on the arrow to the right of the Sub Event and choose **Unlink Sub Event**.
3. A prompt opens asking if the user is sure the selected record(s) should be removed, select **YES**.

For security settings, see [Linking Sub Events](#) on the [Events Module Security](#) page.

# Batch Update Event Records

Updating a group of records can be performed on the following Event record fields:

- [Attributes \(ThesXRefs\)](#)
- [Flex Field Group](#)
- [Geography Xrefs \(ThesXRefs\)](#)
- [Text Entries](#)

To update a group (batch) of Event records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Event Records** on the [Events Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Delete Event Records

The process to [delete a record](#) is the same as in other modules.

When attempting to delete an **Event** record, the [Event Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Event must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Event Records** on the [Events Module Security](#) page.

# Event Usage Report

When deleting an Event record, its usage will display in an Event Usage Report. Any usage of the Event record that prevents it from being deleted will display in **red**. Events that have linked **Sub Event(s)** cannot be deleted.

## Links to the following record(s) in other modules

Object record(s)

Site record(s)

Exhibition record(s)

Media record(s) (MediaXRefs)

## Related Event records

[Sub Event\(s\)](#)

## Usage in Other TMS Products

If there is a valid license for other TMS Suite products, or there was a previous license for **TMS for Windows**, the Usage report will list records from those products that are linked to the Event.

### TMS Conservation Studio

- Project record(s)
- Conservation Report records

### TMS Media Studio

- Project record(s)

# Edit/View Event Records

Select an Event record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Events module: [Open Package records](#) (from the Package panel or Manage Package Folders).

The method for viewing and editing Event records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Event Records** on the [Events Module Security](#) page.

# Link Event to Records in Other Modules

Event records may be [linked to records in other modules](#).

Data that pertains to the link between the Event and the other record is considered part of the Event Main data ([data linked to Event from other modules](#)).

In the Event record, linking to records in other modules is performed by selecting either the top node, or the node labeled with the module name in the [Events Hierarchy Tree](#).

## Link Records in Another Module to the Current Event Record

In an Event record, records from other modules may be linked to the Event using several different methods:

- [Link an existing record](#)
- [Add a new record to link](#)
- To link Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget (select the top tree node)
- To link Media records, use the [Linked Media References \(MediaXRefs\)](#) widget (select the top tree node)

## Unlink a Record

Follow the steps to [Unlink a record](#).

For security settings, see individual linked pages above, as well as **Linking Bibliographies to Event Records**, **Linking Objects to Event Records**, **Linking Exhibitions to Event Records**, and **Linking Sites to Event Records** on the [Events Module Security](#) page.

# Navigate to Records Related to the Event

Navigation to records that are linked to the Event can be performed 2 ways: the Related toolbar option or opening records from a [List View](#).

[Related Records toolbar option for Events](#)

[Opening records from a List View displaying linked records](#)

When the current record is a Sub Event, the [Events Hierarchy Tree](#) will display the **Ascendant Events** node. Selecting this node will display a List View of all parent Event records, which can be opened from the List View.

# Related Records (Toolbar) for Events

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Event record or the entire current record selection.

| Navigation Option                 | Module       | Create link using  | View link other module   |
|-----------------------------------|--------------|--|--|
| Event Object Related Bibliography | Bibliography | <a href="#">Events Hierarchy Tree</a> > Objects > Individual Object > Bibliography | Not currently displayed in Objects module                              |
| Event Related Constituents        | Constituents | <a href="#">Event-Related Constituents widget</a>                                  | <a href="#">Constituents Hierarchy Tree</a> > Related Records > Events |
| Related Bibliography              | Bibliography | Events Hierarchy Tree > Bibliography node  | Not currently displayed in Bibliography module                         |
| Related Exhibitions               | Exhibitions  | Events Hierarchy Tree > Top node or Exhibitions node                               | <a href="#">Exhibitions Hierarchy Tree (Complete)</a> > Events node    |
| Related Media                     | Media        | <a href="#">Related MediaXrefs widget</a> or Events Hierarchy Tree > Media node    | <a href="#">Media Hierarchy Tree</a> > Events node                     |
| Related Objects                   | Objects      | Events Hierarchy Tree > Objects node   | <a href="#">Objects Hierarchy Tree</a> > Events node                   |
| Related Sites                     | Sites        | Events Hierarchy Tree > Top node or Sites node                                     | <a href="#">Sites Hierarchy Tree</a> > Events node                     |

# Exhibitions

The Exhibitions module is used for tracking, planning, and recording information about traveling, in-house, and virtual Exhibitions. The Objects involved in an Exhibition can be linked to an Exhibition record where information specific to Objects in the context of an exhibition can be recorded.

Each Venue to which an Exhibition will travel can be linked to the Exhibition record, and Venue-specific information can be recorded. Venues are added to Exhibition records by linking Constituent records for each venue.

Records from the Loans, Shipping, Media, Constituents, Events, and Bibliography modules can also be linked to the Exhibition.

A list of the fields available for viewing or editing in the Exhibitions module is in [Exhibition data](#).

The [Exhibitions Record Hierarchy Tree](#) provides a hierarchical view of an Exhibition record, and has functionality for adding data and linking and associating other records.

# Exhibition Data

**Exhibition** records have many categories of data directly related to the Exhibition itself. The core Exhibition data is divided into the main (or module-level) context, and multiple sub-categories, or sub-contexts.

The different contexts of an Exhibition record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#), a specific tree node, or an alternate tree layout.

## Exhibition Contexts

| Context   | Node or Tree   | Fields  |
|---|--|---|
| <a href="#">Main Exhibition Record</a>            | Top node   | Data in the main Exhibition record and some sub-categories  |
| <a href="#">Linked records from other modules</a> | Node labeled with module name                            | Fields related to the link between the records; in some cases, the linked record itself may be edited   |
| <a href="#">Exhibition (hierarchy management)</a> | Exhibition hierarchy management alternate Hierarchy Tree | Object-related fields and layout-related fields   |
| <a href="#">Associated Exhibition Records</a>     | Node labeled with relationship name                      | Fields related to the relationship; for each type of relationship, records are in a read-only List View |

In some Exhibition contexts, there may be buttons on a Data Form that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseum Lookup](#)). These widgets are not included on any field lists since they are not part of any record.

# Main Exhibition Record

The main Exhibition record is accessed by selecting the top node of the [Exhibitions Hierarchy Tree \(Complete\)](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the fields available belong to sub-categories, or sub-contexts, but do not require the selection of a separate node or tree. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

## Exhibition Record Fields

| Field   | Description  | Context                         | User Defined? | Authority Controlled?                       | On System Data Form? |
|---|--|---------------------------------|---------------|---|----------------------|
| Actual Attendance                               | The number of people that actually attended an exhibition.   | Exhibitions                     | No            | No  | Yes                  |
| <a href="#">Attributes</a>                      | Thesaurus controlled terms related to an exhibition, such as Exhibition Type or Subject  | Exhibitions /Attributes         | Yes           | Yes   | Yes                  |
| Boiler Text                                     | The official text used to describe an exhibition. May include information such as an exhibition title, exhibition dates, and sponsor information.  | Exhibitions                     | No            | No  | Yes                  |
| Curatorial Notes                                | Any curatorial related notes pertaining to an exhibition.  | Exhibitions                     | No            | No  | Yes                  |
| Display Date                                    | After entering dates in the <i>Exhibition Begin Date</i> and <i>Exhibition End Date</i> fields, the pull-down list is populated. Can also be typed manually.<br><br>The Display Date Widget contains Display Date, Exhibition Begin Date and Exhibition End Date.  | Exhibitions                     | No            | No  | Yes                  |
| Entrance Fee                                    | The amount of money that is charged for admission to an exhibition, in the default currency.   | Exhibitions                     | No            | No  | Yes                  |
| Estimated Attendance                            | The number of people that are estimated to attend an exhibition.   | Exhibitions                     | No            | No  | Yes                  |
| Exhibition Begin Date                           | The date that an exhibition opens.<br><br>The Display Date Widget contains Display Date, Exhibition Begin Date and Exhibition End Date.  | Exhibitions                     | No            | No  | Yes                  |
| Exhibition End Date                             | The date that an exhibition closes.<br><br>The Display Date Widget contains Display Date, Exhibition Begin Date and Exhibition End Date.   | Exhibitions                     | No            | No  | Yes                  |
| Exhibition Mnemonic                             | An abbreviated version of the exhibition title. The exhibition title is added as the default mnemonic value.   | Exhibitions                     | No            | No  | Yes                  |
| Exhibition Status                               | The status of the exhibition, such as Approved, Open, Postponed, or Closed. Can be used as sub statuses within the assigned Exhibition department, such as Approved – In Progress.   | Exhibitions                     | No            | Yes   | Yes                  |
| Exhibition Title                                | A title for an exhibition.   | Exhibitions                     | No            | No  | Yes                  |
| Exhibition Web Copy                             | Web copy for the exhibition.   | Exhibitions                     | No            | No  | Yes                  |
| Exhibition-Citation Text (exhibition)           | A brief description of an exhibition that may be used for press or other exhibition related documentation.   | Exhibitions                     | No            | No  | Yes                  |
| <a href="#">Exhibition-Related Constituents</a> | Linked Constituent records related to an Exhibition, such as Organizer, Sponsor, Curator, or Designer.<br><br>In TMS Composer this field is labeled as ConXRefs-Simple.  | Exhibition-Related Constituents | No            | Yes   | Yes                  |
| <a href="#">Flex Fields</a>                     | Flex Fields are "flexible" or user-created fields that are configured in the <a href="#">TMS Suite Application Configuration Utility</a> . All <b>ungrouped</b> flex fields for a record display together in a "container."<br><br><b>Grouped</b> Flex Fields are related and can include workflow and approval information. A Flex Field group displays in its own container. | Exhibition Flex Field Xrefs     | Yes           | Depends on configuration of the Flex Field. | No                   |
| <a href="#">Historical Dates</a>                | Any dates related to the exhibition, such as Installation Start, Installation End and Members' Preview dates   | Exhibition Dates                | No            | No  | Yes                  |
| In-House Exhibition                             | Indicates if an exhibition will be in house.   | Exhibitions                     | No            | No  | Yes                  |
| Light Exposure Days per Week                    | The number of days per week that objects in an exhibition may be exposed to light.   | Exhibitions                     | No            | No  | Yes                  |

|   |  |                              |     |     |     |
|---|--|------------------------------|-----|-----|-----|
| Light Exposure Hours per Day            | The number of hours per day that objects in an exhibition may be exposed to light.   | Exhibitions                  | No  | No  | Yes |
| Location                                | <p>Linked Location record in an institution where an exhibition is installed or stored.</p> <p>Click on the <b>three dot</b> button to the right of the widget. The Location Lookup screen opens. Internal and External locations are displayed in an expandable list. Expand the desired location type, choose a location and click <b>Select</b>. The location will now display in the widget.</p> <p>The Filter Inactive Locations checkbox can be used to filter out any locations that have been marked inactive.</p> <p>See <a href="#">Location Authority</a> for instructions on managing locations.</p> | Exhibitions                  | No  | Yes | Yes |
| Organization Credit Line                | A credit line provided by an exhibition organizer.   | Exhibitions                  | No  | No  | Yes |
| Planning Stage                          | The Exhibition Planning Stage (department) to which an Exhibition record is assigned. Planning Stages serve as the highest categorical level to which an Exhibition record can belong, and control security. Example Exhibition Planning Stages could be Planning, Active, Pending, or Closed.   | Exhibitions                  | No  | Yes | Yes |
| Project Number                          | A project number assigned to an exhibition.  | Exhibitions                  | No  | No  | Yes |
| Public Information                      | Indicates if the Exhibition record is approved to be used on the institution's website.  | Exhibitions                  | No  | No  | Yes |
| Registration Notes                      | Any registration related notes pertaining to an exhibition.  | Exhibitions                  | No  | No  | Yes |
| <a href="#">Related MediaXRefs</a>      | Where Media records associated with the Exhibition record can be linked.   | Exhibitions /Media Xrefs     | No  | No  | Yes |
| Remarks                                 | Any notes about an exhibition.   | Exhibitions                  | No  | No  | Yes |
| <a href="#">Single-Value Text Entry</a> | User-defined fields that provide the option to save formatted text. Only a single field can be entered.  | Exhibitions /Text Entries    | Yes | No  | No  |
| Sponsor Credit Line                     | A credit line provided by a sponsor of an exhibition.  | Exhibitions                  | No  | No  | Yes |
| <a href="#">Statuses-Active</a>         | Thesaurus controlled terms linked to an Exhibition record.   | Exhibitions /Statuses-Active | Yes | Yes | Yes |
| SubTitle                                | A subtitle for an exhibition.  | Exhibitions                  | No  | No  | Yes |
| <a href="#">Text Entries</a>            | User-defined fields that provide the option to save formatted text. Multiple fields may be entered, and display in a grid on records.  | Exhibitions /Text Entries    | Yes | No  | Yes |
| Traveling Exhibition                    | Indicates if an exhibition will travel to multiple venues.   | Exhibitions                  | No  | No  | Yes |
| Virtual Exhibition                      | Indicates if an exhibition is virtual. This can mean that actual objects are not put on display, or that an exhibition is web based.   | Exhibitions                  | No  | No  | Yes |

# Linked Data (From Records Linked to Exhibitions)

In an Exhibition record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Exhibition Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Constituent and Media records are also available in in the [Main Exhibition Record](#) in the [Linked Constituent References \(ConXRef\)](#) and [Linked Media References \(MediaXRef\)](#) widgets. Select the top tree node to access them.

## Link-Related Fields

When an Exhibition is linked to records in other modules, information is generated that pertains to the link.

The following fields pertain to the *link* between an Exhibition record and a record from another module. These fields are not part of either the Exhibition record or the linked record, and only exist when the records are linked.

- [Linked-Bibliography Data](#)
- [Linked-Event Data](#)
- [Linked-Constituent \(ConXRef\) Data](#)
- [Linked-Media \(MediaXRef\) Data](#)
- [Exhibition-Object Data](#)
- [Exhibition-Loan Data\\*](#)
- [Exhibition-Venue Data](#)
- [Shipment-Exhibition Data\\*](#)

\*The data is read only in this module. It must be accessed in the linked record in the other module.

# Exhibition-Loan Data

In the [Exhibitions Hierarchy Tree](#), select the **Incoming Loans** or **Outgoing Loans** node. A list of all Incoming or Outgoing Loans (determined by the node that was selected) linked to the Exhibition will display in a read-only [List View](#).

Select a node labeled with the **Loan Number and Primary Lender/Borrower**. A preconfigured [Data View](#) will display on the right.

The Data View will contain fields pertaining to the linked Loan and its Loan Objects.

## Exhibition Loan Data View (all data is read-only)

| Type of data     | Description  |
|------------------|--|
| Loan data        | Fields from the <a href="#">Main Loan Record</a>   |
| Loan Object data | Fields from the <a href="#">Main Object Record</a> |

For security settings, see **Exhibition Loan Data** on the [Exhibitions Module Security](#) page.

# Exhibition-Object Data

Select the **Objects** tree node. A list of all Object records linked to the Exhibition will display in a read-only [List View](#).

Select a node labeled with the **Object Number and Title**. The fields listed below will display in a [Data Form \(Data Entry View\)](#). Changes to these fields will *not* be reflected in the Object record.

## Exhibition Object Fields

| Field                                  | Description   |
|--|---|
| Attributes - Exhibition Object Xrefs   | Thesaurus controlled terms linked to an Exhibition Object.<br>Refer to <a href="#">Attributes (ThesXRefs)</a>   |
| Case Number                            | The case number in which an object is displayed in an exhibition.   |
| Catalogue Number                       | A number for an Exhibition Object as it relates to an exhibition catalogue, such as a catalogue entry number or plate number.   |
| Citation Text                          | A citation for an object in the context of an exhibition. May be used for things such as an exhibition-related website, exhibition-related marketing, or press purposes.  |
| Content Layout                         | The layout to which the Object was assigned in the Exhibition based on its content, or subject.<br>Refer to <a href="#">Exhibition Layouts</a> .  |
| Credit Line                            | The credit line for an object in the context of an exhibition. By default populated by the value in the <i>Credit Line</i> field in the Object record.  |
| <a href="#">Designer Object Number</a> | Column not currently in use   |
| Dimensions                             | The dimensions of an object in the context of an exhibition. By default, populated by the value in the <i>Display Dimensions</i> field in the Object record.  |
| Display Date                           | The display date for the creation of an object in the context of an exhibition. By default, populated by the value in the <i>Display Date</i> field in the Object record.   |
| ExhObj Status                          | The status for an object as it relates to an exhibition, such as Pending, Active, Completed, or Rejected.   |
| Flex Fields                            | Allows Flex Fields to be added to an Exhibition Object.<br>Refer to <a href="#">Flex Fields</a>   |
| <a href="#">Heading</a>                | Column not currently in use   |
| Light Exposure Lux per Hour            | The amount of light, in lux, to which an Exhibition Object can be exposed.  |
| Location Layout                        | The layout to which the Object was assigned in the Exhibition based on its location.<br>Refer to <a href="#">Exhibition Layouts</a> .   |
| Medium                                 | The medium, technique, or process used in an object's creation in the context of an exhibition. By default, populated by the value in the <i>Medium</i> field in the Object record.   |
| Object Removed                         | Used to indicate that an Exhibition Object has been removed from the exhibition.  |
| Object Removed Notes                   | Any notes about the Exhibition Object being removed from the exhibition.  |
| Object Title ID                        | A title of an object in the context of an exhibition. By default, populated by the primary <i>Title</i> entry entered from the Object record.<br>Clicking the <b>refresh</b> button in the upper right above the field will replace the current value with the Primary Object Title from the Object record. |
| Related MediaXRefs                     | Where Media records associated with the Exhibition Object can be linked.<br>Refer to <a href="#">Linked Media References (MediaXRefs)</a>   |
| Remarks                                | Any notes about an object in the context of an exhibition.  |
| Section                                | An area in an exhibition where an object is displayed.<br>Values entered in this field are stored in a pull-down list that can be used later for quick entry.   |
| Sequence Number                        | A number assigned to an object as it relates to its sequenced position in an exhibition.  |

|   |   |
|---|---|
| Single-Value Text Entry                   | User-defined fields that provide the option to save formatted text. Only a single field can be entered.<br>Refer to <a href="#">Single-Value Text Entries (Web Application field)</a> |
| Statuses-Active - Exhibition Object Xrefs | Thesaurus controlled terms linked to an Exhibition Object. Can be used to record statuses and workflows for individual objects.<br>Refer to <a href="#">Statuses</a>                  |
| Sub-Section                               | A smaller, divided part of the area value entered in the <i>Section</i> field. Values entered in this field are stored in a pull-down list that can be used later for quick entry.    |
| Text Entries                              | User-defined fields that provide the option to save formatted text. Multiple fields may be entered, and display in a grid on records.<br>Refer to <a href="#">Text Entries</a>        |

For security settings, see **Exhibition Object Fields** on the [Exhibitions Module Security](#) page.

# Exhibition-Venue Data

In the Exhibitions Hierarchy Tree, select the Venues node to view a summary of [Exhibition Venues](#) (which are linked Constituent records) in a read-only [List View](#).

To view Venue details in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **Venue (Constituent) Display Name**.

Some fields in linked Constituent and Media records are also available in the [Constituent Link \(ConXRef\)](#) and [Media Link \(MediaXRef\)](#) widgets. Select the tree node labeled with the Venue name to access them.

## Link-Related Fields

In the Exhibition Venue record, by selecting the appropriate node in the tree, both the linked Constituent (Venue) record and fields related to the link are accessible.

The following fields pertain to the link between the Exhibition record and the Constituent (Venue) record. These fields are not part of the Exhibition or the Constituent record.

## Exhibition Venue fields

| Field                                     | Description   |
|---|---|
| Approved                                  | Indicates if a venue has been approved for an exhibition.   |
| Contact                                   | The name of a person to contact at a venue about an exhibition. Preferably, a Constituent record for a venue contact is linked in the <i>Venue-Related Constituents</i> field.  |
| Date Qualifier                            | A qualifier for the dates entered in the <i>Venue Begin Date</i> and <i>Venue End Date</i> fields, such as Pending, Estimated, or Actual.   |
| Flex Fields                               | Allows Flex Fields to be added to an Exhibition Venue. Refer to <a href="#">Flex Fields</a>   |
| Foreign Venue                             | Indicates if an exhibition venue is outside of the country of the organizing institution.   |
| Insurance Remarks                         | Any notes about insurance as it relates to an Exhibition Venue.   |
| Light Exposure Days per Week              | The number of days per week that Exhibition Objects may be exposed to light at a venue.   |
| Light Exposure Hours per Day              | The number of hours per day that Exhibition Objects may be exposed to light at a venue.   |
| Mnemonic                                  | An abbreviated version of the name of an Exhibition Venue. The name of the linked Constituent record in the <i>Venue (Constituent)</i> field populates this field by default.   |
| Reason for Denial                         | The reason why a venue has denied an exhibition.  |
| Remarks                                   | Any notes related to the Exhibition Venue.  |
| Storage Venue                             | Indicates if a venue is used to store objects related to an exhibition.   |
| Statuses-Active - Exhibition Venues Xrefs | Thesaurus controlled terms linked to an Exhibition Venue. Refer to <a href="#">Statuses (ThesXRefs)</a>   |
| Venue Name                                | Linked Constituent record of a Venue where an Exhibition will be installed or stored. Refer to <a href="#">Linked Constituent References (ConXRefs)</a>   |
| Venue Address                             | An address for a Venue. Populated by a selection from the Constituent Addresses entered in the Constituent record belonging to the Venue.   |
| Venue Begin Date                          | The date that an Exhibition opens at a Venue.   |
| Venue End Date                            | The date that an Exhibition closed at a Venue.  |
| Venue Locations                           | Used to record Exhibition-related locations at each venue. Locations are selected from the list in Location LookUp See <a href="#">Location Authority</a> for instructions on managing locations.   |
| Venue-Related Constituents                | Linked Constituent records for people or entities related to an exhibition venue, such as a Curator at Venue, or Contact. The Constituent record selected in the <i>Venue Name (Venue Constituent)</i> field is linked by default.<br><br>Refer to <a href="#">Linked Constituent References (ConXRefs)</a> |

For security settings, see **Exhibition Venue Fields** on the [Exhibitions Module Security](#) page.



# Linked Data (From Records Linked to Venues)

A Venue may be linked to records in other modules.

In the [Exhibitions Hierarchy Tree](#), select the node for the individual **Venue** to access the [Linked Constituent References \(ConXRefs\)](#) and [Linked Media References \(MediaXRefs\)](#) widgets in a [Data Form \(Data Entry View\)](#).

Data related to the links between the Venue and Constituent records or the Venue and Media records is accessible only in the their respective widgets.

Refer to:

[Linked-Constituent \(ConxRef\) Data](#)

[Linked-Media \(MediaXRef\) Data](#)

[Venue-Object Data](#)

# Venue-Object Data

In the [Exhibitions Hierarchy Tree](#), select the node labeled with the **individual Venue** (Constituent Display Name) to access Venue-related fields in a [Data Form \(Data Entry View\)](#).

Select the node labeled **Included Objects**. A read-only [List View](#) of Exhibition Objects included in (linked to) the Venue will display.

## Venue-Object Fields

| Field                         | Description   |
|-------------------------------|---|
| Object                        | The Exhibition Object that is included in the Venue   |
| Approved                      | The Exhibition Object has been approved for this Venue  |
| Displayed                     | The Exhibition Object will display at this Venue  |
| Begin Display Date            | The Date that this Exhibition Object will begin display at this Venue if different from Venue Begin Date.<br>Some Exhibition Objects will not display the entire time at the Venue; for example, Objects with light exposure restrictions |
| End Display Date              | The Date that this Exhibition Object will begin end at this Venue if different from Venue Begin Date. .   |
| Catalog Number                | A number for an Exhibition Object as it relates to a Venue.   |
| Remarks                       | Any notes about an Object in the context of a Venue.  |
| Light Exposure Per Hour (LUX) | The amount of light, in lux, to which an Exhibition Object can be exposed at the Venue.   |

For security settings, see **Exhibition Venue Object Fields** on the [Exhibitions Module Security](#) page.

# Associated Exhibition Records

In the [Exhibitions Hierarchy Tree](#), select the node labeled with the relationship name (Parent Records or Child Records) to access related fields in a read-only [List View](#).

# Exhibitions Hierarchy Tree (Complete)

The main **Exhibitions Hierarchy Tree** provides access to all [core Exhibition data](#), including data that is linked from other modules. It is labeled **Exhibition (complete)**.

The data that displays in the center panel is determined by the tree node that is selected. The main Exhibition record is represented in the top node, with child nodes representing modules or types of Exhibition data. Some child nodes have their own child nodes for individual records.

In addition to the main tree layout, there is an alternate hierarchy tree layout available: [Exhibition \(hierarchy management\)](#)

## Exhibitions Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Exhibitions Hierarchy Tree Layout

### Exhibition (top node)

Venues

(Mnemonic + Venue Name)

Objects

(Object Number + Artist/Maker + Title + Object Display Date)

Incoming loans

(Loan Number + Borrower)

Loan Objects

Loan Objects in Exhibition

Loan Objects not in Exhibition

Outgoing Loans

(Loan Number + Lender)

Loan Objects

Loan Objects in Exhibition

Loan Objects not in Exhibition

Constituents

Media

Bibliography

Shipments\*

Events\*

Parent Records\*

Relationship Name

Child Records\*

Relationship Name

See Also Records\*

Relationship Name



Nodes marked with \* will only display if a link or association exists with the current Exhibition record.

# Alternate Hierarchy Tree (Hierarchy Management)

The **Exhibition (Hierarchy Management)** layout displays the Exhibition record, Object records that are included in the Exhibition, as well as nodes for Content and Location layouts and Packages. Refer to [Exhibition Layouts](#).

## Exhibition (top node)

Objects

(Object Number + Artist/Maker + Title + Object Display Date)

Content Layout

Section Title

Objects included in section

(Object Number + Artist/Maker + Title + Object Display Date)

Objects excluded from section

(Object Number + Artist/Maker + Title + Object Display Date)

Location Layout

Section Title

Objects included in section

(Object Number + Artist/Maker + Title + Object Display Date)

Objects excluded from section

(Object Number + Artist/Maker + Title + Object Display Date)

Packages

Package Name

Included Objects

(Object Number + Artist/Maker + Title + Object Display Date)

Excluded Objects

# Add New Exhibition Record

To create an Exhibition record, follow the steps to [add a new record](#) from the toolbar.

## Fields Required When Adding New Exhibition Records

| Field               | Description   | Notes   |
|---------------------|---|---|
| Planning Stage      | A list of preconfigured Exhibition Planning Stages (Departments). | A description of this field is available in the list of <a href="#">main Exhibition record fields</a> . |
| Exhibition Title    | A title for an exhibition.  |   |
| Exhibition Mnemonic | An abbreviated version of the exhibition title.                   | The exhibition title is added as the default mnemonic value.  |

For security settings, see **Creating Exhibition Records** on the [Exhibitions Module Security](#) page.

# Associate Exhibition with Another Exhibition

See [Associate \(Link\) Records from the Same Module](#).

# Batch Update Exhibition Records

Updating a group of records can be performed on the following Exhibition record fields:

- [Attributes \(ThesXRefs\)](#)
- Department
- Exhibition Status
- [Flex Field](#)
- [Flex Field Group](#)
- [Public Information](#)
- [Statuses \(ThesXRefs\)](#)
- [Text Entries](#)

To update a group (batch) of Exhibition records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Exhibition Records** on the [Exhibitions Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Batch Update Exhibition Objects

The following fields are available for updating in a batch (group) of Objects linked to the current Exhibition record:

- Case Number
- Citation Text
- Credit Line
- [Dimensions](#)
- Display Date
- Exhibition Object Status
- [Flex Field](#)
- Heading
- Light Exposure Lux per Hour
- Medium
- Remarks
- Section
- [Single-Value Text Entry](#)
- Sub-section

To update the Object records linked to an Exhibition record, follow the steps to [Batch Update Linked Records](#).

For security settings, see **Batch Updating Exhibition Objects** on the [Exhibitions Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Batch Update Loan Objects Linked to the Exhibition

Loan Objects that are linked to an Exhibition can be updated in a batch (group) in the Exhibitions module. The same fields are available for batch updating Loan Objects in the Loans module.

Refer to [Batch Update Loan Objects](#).

For security settings, see **Batch Updating Loan Objects Linked to the Exhibition** on the [Exhibitions Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Batch Update Venue Objects

The following fields are available for updating in a batch (group) of Objects that have been included at a Venue:

- Approved
- Catalog Number
- Display Begin ISO Date
- Display End ISO Date
- Displayed
- Light Exposure Lux per Hour
- Remarks

To update the Object records that have been included at a Venue, follow the steps to [Batch Update Linked Records](#).

For security settings, see **Batch Updating Venue Objects** on the [Exhibitions Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Delete Exhibition Records

The process to [delete a record](#) is the same in Exhibitions as in other modules.

When attempting to delete an Exhibition record, an [Exhibition Usage Report](#) will display.

If a deletion is blocked by any usages listed in the report, the record linked to the Exhibition must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Exhibition Records** on the [Exhibitions Module Security](#) page.

# Exhibition Usage Report

When deleting an Exhibition record, its usage will display in an Exhibition Usage Report. Any usage of the Exhibition record that prevents it from being deleted will display in **red**.

## Links to the following record(s) in other modules

Constituent record(s)

Loan record(s)

Object record(s)

Media record(s)

Bibliography record(s)

Event record(s)

Shipment record(s)

## Usage in Other TMS Products:

If there is a valid license for other TMS Suite products, or if there was a previous license for **TMS for Windows**, the Usage report will list records from those products that are linked to the Exhibition.

### **TMS Conservation Studio**

- Project record(s)

### **TMS Media Studio**

- Project record(s)

### **TMS Windows**

# Edit/View Exhibition Records

Select an Exhibition record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Exhibitions module: [Open Package Records](#) (from the Package panel or Manage Package Folders)

The method for viewing and editing Exhibition records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Exhibition Records** on the [Exhibitions Module Security](#) page.

# Link Exhibition to Records in Other Modules

Exhibition records may be [linked to records from other modules](#).

Data that pertains to a link between the Exhibition and the other record is considered part of the Exhibition Main data ([data linked to Exhibition from other modules](#)).

In the Exhibition record, linking to records in other modules is performed by selecting the node labeled with the module name in the [Exhibitions Hierarchy Tree \(Complete\)](#).

## Link Records in Another Module to the Current Exhibition Record

In an Exhibition record, records from other modules may be linked to the Exhibition using several different methods:

- [Link an Existing Record](#)
- [Add a new record to link](#)
- To link Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget (select the top tree node)
- To link Media records, use the [Linked Media References \(MediaXRefs\)](#) widget (select the top tree node)
- To link Object records, additional options are [Linking Objects using Package or Object Working List](#)

## Link Options Unique to Exhibitions

- [Exhibition Venues \(Link Constituent as a Venue\)](#)
- To link the Objects in a linked Loan, refer to [Link Loan Objects to the Exhibition](#)
- [Link Exhibition Objects to a Loan](#)

## Unlink a Record

Follow the steps to [Unlink a record](#).

For security settings, see individual linked pages above, as well as **Linking Objects to Exhibition Records**, **Linking Bibliography Records to Exhibition Records** and **Linking Events to Exhibition Records** on the [Exhibitions Module Security](#) page. To create a new Event record to link to an Exhibition record, see **Creating Event Records** on the [Events Module Security](#) page.

# Exhibition Venues (Link Constituent as a Venue)

**Exhibition Venues** are the locations where an Exhibition is displayed or stored. They can be viewed or edited by selecting the Venues node in the [Exhibitions Hierarchy Tree \(Complete\)](#).

When a Venue is added to an Exhibition, a Constituent record is selected and linked to the Exhibition as a Venue and additionally as an Exhibition-Related Constituent.

Venues differ from Exhibition-Related Constituents, however. Exhibition-related Constituents have a relationship with the *Exhibition only*. Venues have relationships with the *Exhibition and the Exhibition Object*.

## Add a Venue to an Exhibition

1. In the tree, select the **Venues** node.
2. Select the **arrow** to the right of the node and select **Add New Exhibition Venue**, the Add New Exhibition Venue window opens.
3. Select **+** to search for a Constituent, the Constituent Search window opens.
4. Begin entering the **Constituent Name**, suggested results will display in a list.
5. Select a Constituent from the list, choose **SELECT**.
6. **Optional**: enter values for Approved, Storage Venue, Foreign Venue, Venue Begin Date, Venue End Date, and Venue Mnemonic, see [Venue fields](#).
7. Select **ADD**.
8. The window will close and the Venue will be under the Venues node in the tree.

## Including and Excluding Objects at a Venue

Not all Objects in the Exhibition are stored/displayed in each Venue.

**Included** Objects are Objects in the current Exhibition that are at the selected Venue.

**Excluded** Objects are Objects in the current Exhibition that are *not* at the selected Venue.

Underneath the Venues node are the Included and Excluded Objects nodes. When selected, a list of the Included (*or Excluded*) Objects displays in a List View in the center panel of the page.

When Venues are first linked to an Exhibition, by default, the Exhibition Objects are *excluded* from each Venue.

## Include Exhibition Objects at a Venue

1. In the tree expand the Venues node and then the specific Venue node.
2. Select **Excluded Objects**, a List View of excluded Objects displays in the center panel of the page.
3. Use the checkboxes to select the Object record(s) that should be included at the selected venue.
4. Select three dots (...) in the List View toolbar.
5. Select **Add selected Object(s) to Exhibition Venue**. The Object(s) will be removed from the List View. The Object(s) will now display when the **Included Objects** node is selected.

## Exclude (Remove) Exhibition Objects from a Venue

1. In the tree expand the Venues node and then the specific Venue node.
2. Select **Included Objects**, a List View of included Objects displays in the center panel of the page.
3. Use the checkboxes to select the Object record(s) that should be excluded from the selected venue.
4. Select three dots (...) in the List View toolbar.
5. Select **Remove selected Object(s) from Exhibition Venue**. The Object(s) will be removed from the List View. The Object(s) will now display when the **Excluded Objects** node is selected.

## Ordering Venues

To change the display order of Exhibition Venues in the tree:

1. Select a Venue in the tree.
2. Select the **arrow** to the right of the Venue and select **Order**.
3. Select **First**, **Next**, **Previous**, or **Last**. The Venue will be moved to the selected position in the tree.

## Removing Exhibition Venues

1. Select a Venue in the tree.
2. Select the **arrow** to the right of the Venue and select **Remove Venue**.
3. A prompt opens asking if the user is sure the Venue should be deleted. If the Venue has linked Constituent records or linked Object records, the number of links for each will be stated. Select **YES**



Removing a Venue from an Exhibition record only removes the record link. It does not delete the Venue's Constituent record.

For security settings, see **Linking Venue Constituent to Exhibition Records** and **Including and Excluding Objects at an Exhibition Venue** on the [Exhibitions Module Security](#) page.

# Link Loan Objects to the Exhibition

In an **Exhibition record**, Objects belonging to any linked Loans may be added to the Exhibition.

By default, in an Exhibition record, when a Loan is linked, the Objects in the Loan will *not* be automatically linked to the Exhibition.

The linked Loan's Objects can be added under the Loans node in the [Exhibitions Hierarchy Tree](#).

In the Exhibitions Hierarchy Tree, under Exhibitions > Loans > individual Loan, there are 3 nodes:

- Loan Objects displays a list of all Objects in the linked Loan
- Loan Objects **in** Exhibition displays a list of all Objects in the linked Loan that are also included in (linked to) the Exhibition
- Loan Objects **not in** Exhibition displays a list of all Objects in the linked Loan that are *not* included in (linked to) the Exhibition

## Add Loan Objects to a Linked Exhibition Record

1. In the Exhibition record, in the Exhibitions Hierarchy Tree, expand the Incoming Loans or Outgoing Loans node to display a list of Loans.
2. Select and expand the node for a specific Loan.
3. Select **Loan Objects not in Exhibition** to display a list of all Objects in the linked Loan that are not included in (linked to) the Exhibition.
4. In the List View on the right, select/check Loan Objects to add to the Exhibition.
5. Select three dots (...) in the List View toolbar.
6. Select **Add selected Loan Objects to the Exhibition**. The Loan Objects will be linked to the Exhibition.

## Remove Loan Objects from a linked Exhibition record

1. In the Exhibition record, in the Exhibitions Hierarchy Tree, expand the Incoming Loans or Outgoing Loans node to display a list of Loans.
2. Select and expand the node for a specific Loan.
3. Select **Loan Objects in Exhibition** to display a list of all Objects in the linked Loan that are included in (linked to) the Exhibition.
4. In the List View on the right, select/check Loan Objects to remove from the Exhibition.
5. Select three dots (...) in the List View toolbar.
6. Select **Remove selected Loan Objects from the Exhibition**. The Loan Objects will be unlinked from the Exhibition.

For security settings, see **Linking Objects to Exhibition Records** on the [Exhibitions Module Security](#) page.

# Link Exhibition Objects to a Loan

In a **Loan record**, Objects belonging to any linked Exhibitions may be added to the Loan.

By default, in a Loan record, when an Exhibition is linked, the Objects in the Exhibition will *not* be automatically linked to the Loan.

The linked Exhibition's Objects can be added under the Exhibitions node in the [Loans Hierarchy Tree](#).

In the Loans Hierarchy Tree, under Loans > Exhibitions > individual Exhibition, there are 3 nodes:

- Exhibition Objects displays a list of all Objects in the linked Exhibition
- Exhibition Objects **in** Loan displays a list of all Objects in the linked Exhibition that are also included in (linked to) the Loan
- Exhibition Objects **not in** Loans displays a list of all Objects in the linked Exhibition that are not included in (linked to) the Loan

## Add Exhibition Objects to a linked Loan Record

1. In the Loan record, in the Loans Hierarchy Tree, expand the Exhibitions node to display a list of linked Exhibitions.
2. Select and expand the node for a specific Exhibition.
3. Select the node **Exhibition Objects not in Loan**. A list of Objects in the linked Exhibition that are *not* included in (linked to) the Loan will display.
4. In the List View on the right, select/check the Exhibition Objects to add to the Loan.
5. Select three dots (...) in the List View toolbar.
6. Select **Add selected Objects to the Loan**. The Exhibition Objects will be linked to the Loan.

## Remove Exhibition Objects from a linked Loan Record

1. In the Loan record, in the Loans Hierarchy Tree, expand the Exhibitions node to display a list of linked Exhibitions.
2. Select and expand the node for a specific Exhibition.
3. Select the node **Exhibition Objects in Loan**. A list of Objects in the linked Exhibition that are included in (linked to) the Loan will display.
4. In the List View on the right, select/check Exhibition Object(s) to remove from the Loan.
5. Select three dots (...) in the List View toolbar.
6. Select **Remove selected Objects from the Loan**. The Exhibition Objects will be unlinked from the Loan.

For security settings, see [Linking Objects to Loan Records](#) on the [Loans Module Security](#) page.

# Navigate to Records Related to the Exhibition

Navigation to records that are linked to the Exhibition can be performed 2 ways:

[Toolbar option for records related to Exhibition\(s\)](#)

[Opening records from a List View displaying linked records](#)

# Related Records (Toolbar) for Exhibitions

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Exhibition record or the entire current record selection.

| Navigation Option               | Module       | Create link using  | View link other module  |
|---------------------------------|--------------|--|---|
| Exhibition Venue Constituent    | Constituents | <a href="#">Exhibitions Hierarchy Tree (Complete)</a> > Venues node                | <a href="#">Constituents Hierarchy Tree</a> > Related Records > Venues node |
| Exhibition Related Constituents | Constituents | <a href="#">Exhibition-Related Constituents widget</a>                             | Constituents Hierarchy Tree > Related Records > Exhibitions node            |
| Related Bibliography            | Bibliography | Exhibitions Hierarchy Tree (Complete) > Top node or Bibliography node              | <a href="#">Bibliography Hierarchy Tree</a> > Exhibitions node              |
| Related Events                  | Events       | Exhibitions Hierarchy Tree (Complete) > Top node or Events node                    | <a href="#">Events Hierarchy Tree</a> > Exhibitions node                    |
| Related Loans                   | Loans        | Exhibitions Hierarchy Tree (Complete) > Incoming Loans node or Outgoing Loans node | <a href="#">Loans Hierarchy Tree</a> > Exhibitions node                     |
| Related Media                   | Media        | <a href="#">Related MediaXrefs widget</a>  | Related Media record  |
| Related Objects                 | Objects      | Exhibitions Hierarchy Tree (Complete) > Top node or Objects node                   | <a href="#">Objects Hierarchy Tree</a> > Exhibitions node                   |
| Related Shipments               | Shipping     | <a href="#">Shipping Hierarchy Tree</a> > Exhibitions node                         | Exhibitions Hierarchy Tree > Shipments node                                 |

# Exhibition Layouts

In an Exhibition, the Exhibition Layout feature is available for assisting in the beginning design/conceptualization planning phases of the Exhibition.

The feature is available in the [alternate Exhibition Record Hierarchy tree \(Hierarchy Management\)](#).

In the Exhibition Layout tree, there are 3 major nodes: *Objects*, *Content Layout*, *Location Layout*, and *Packages*.

**Objects** are the Exhibition Objects

**Content Layouts** correspond to the themes or content categories of the Exhibition.

**Location Layouts** correspond to the physical locations within an Exhibition.

## Packages

Both Content and Location layouts are created in the Thesaurus (refer to the instructions to Create an Exhibition Layout below).

Using the options available in the tree, Exhibition Objects can be assigned to a Content Layout and a Location Layout. This is not related to moving Objects - it is for planning purposes only.

## Create Content and Location Layouts

1. In an Exhibition record, select the Hierarchy Management alternate tree from the tree selector at the top left of the panel. The Content and Location Layout nodes will be empty.
2. In the top node of the tree, select **Create Exhibition Layout**. The Thesaurus will automatically open.
3. Expand Exhibition Layout. There will be a concept for the current Exhibition.
4. Expand the node for the current Exhibition to display the concepts for Content Layout and Location Layout. Narrower terms can now be added for thematic topics and physical locations.
5. Select **Content Layout**.
6. Add a concept for a content category: Right-click and select **Add Narrower Concept**.
7. Enter the required information and select OK.
8. Select **Location Layout**.
9. Add a concept for a location category: Right-click and select **Add Narrower Concept**.
10. Enter the required information and select OK.
11. Close the Thesaurus window (x in the top right of the window).
12. In the Exhibition record, select **refresh** the tree.
13. The concepts that were created in the Thesaurus will now display in the tree by expanding the Content Location and Layout Location nodes.

In order to add more Content or Location concepts, log into the Thesaurus separately. The automatic navigation to the Thesaurus only occurs when the Exhibition Layout is first created for an Exhibition.

In the Thesaurus, for both Content and Location layouts, when a concept is selected, a narrower concept may be added for up to 5 nested levels.

## Add Exhibition Objects to a Layout

Once Content and/or Location layouts are created in the Thesaurus, Exhibition Objects can be assigned to the layouts in the Exhibition record.

Exhibition Objects can be assigned to a layout from two different locations in the tree: the layout itself or the Object.

## Add Exhibition Object within the Layout

By using the List View for the Included or Excluded node, multiple Objects can be assigned to or removed from a layout in one step.

1. In the tree, expand the Content or Location layout node.
2. Select the layout where the Object will be added.
3. Expand the layout node. There will be child nodes for "Objects excluded from this section" and "Objects included from this section."
4. Select the **Objects excluded from this section node**. The list of Exhibition Objects that are unassigned will display in a List View in the center panel.
5. Select the Object(s) to be assigned to the layout in the List View.
6. Select the List View option **Add selected objects to section**.
7. Answer YES to the confirmation message.
8. The Objects will now be assigned to the layout.
9. Select the **Objects included in this section node**. The Objects that were assigned will now display in a List View in the center panel.

## Add Exhibition Object Within the Object Record

Objects must be selected and assigned to a layout one at a time.

1. In the tree, expand the **Objects node**.
2. Select the **node of the Object** to assign.
3. In the center panel, select **Edit** in the Content Layout or Location Layout widget. A Thesaurus Lookup window will open.
4. In the layout schema, the list for a layout can be expanded for up to five levels.

5. Select the layout to which the Object will be assigned and then **Select**. The Thesaurus Lookup will close.
6. The selected layout will now display in the corresponding widget (Content or Location).
7. **Select and Expand the node** in the tree for the layout to which the Object was just assigned.
8. Select the **Objects included in this section** node. The Object that was assigned will now display in a List View in the center panel.

For security settings, see **Exhibition Layouts** on the [Exhibitions Module Security](#) page.

# Insurance Policies

Insurance Policy records are used to record and track information about insurance policies, such as the policy name, insurance type, policy related constituents, related objects and their values.

A list of the fields available for viewing or editing in the Insurance Policies module is in [Insurance Policy Data](#).

The [Insurance Policies Hierarchy Tree](#) provides a hierarchical view of an Insurance Policy record, and has functionality for adding data and linking other records.

# Insurance Policy Data

**Insurance Policy** records have many categories of data directly related to the Insurance Policy itself. The core Insurance Policy data is divided into the main (or module-level) [context](#), and multiple sub-categories, or sub-contexts.

The different contexts of an Insurance Policy record are accessed by selecting either a specific widget in a [Data Form](#) or a specific tree node.

## Insurance Policy Contexts

| Context   | Node or Tree                  | Fields available in Data Form   |
|---|-------------------------------|---|
| <a href="#">Main Insurance Policy record</a>      | Top node                      | Data in the main Insurance Policy record and some sub-categories                                      |
| <a href="#">Linked records from other modules</a> | Node labeled with module name | Fields related to the link between the records; in some cases, the linked record itself may be edited |

In some Insurance Policy contexts, on the Data Form, there are widgets that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseumLookup](#)). These widgets are not included on any fields lists since they are not part of any record.

# Main Insurance Policy Record

The main Insurance Policy record is accessed by selecting the top node of the [Insurance Policies Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the fields available belong to sub-categories, or sub-contexts, but do not require the selection of a separate node or tree. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

## Insurance Policy Record Fields

| Field                                       | Description   | Context                         | User Defined? | Authority Controlled? | On System Data Form? |
|---|---|---------------------------------|---------------|-----------------------|----------------------|
| Begin Date                                  | The date that insurance coverage for a policy begins.   | Insurance Policies              | No            | No                    | Yes                  |
| Department                                  | The department to which an Insurance Policy record is assigned. Insurance Policy departments serve as the highest categorical level to which an Insurance Policy record can belong, and control security. | Insurance Policies              | No            | Yes                   | Yes                  |
| End Date                                    | The date that insurance coverage for a policy ends.   | Insurance Policies              | No            | No                    | Yes                  |
| Insurance Type                              | The type of insurance policy, such as, Blanket Policy, Government Indemnity, or Lender's Private Insurance Policy.  | Insurance Policies              | No            | Yes                   | Yes                  |
| Policy Name                                 | A name for an insurance policy.   | Insurance Policies              | No            | No                    | Yes                  |
| Policy Number                               | An identifying number for an insurance policy, may be automatically populated or manually entered.  | Insurance Policies              | No            | No                    | Yes                  |
| <a href="#">Policy-Related Constituents</a> | Linked Constituent records for people involved with an insurance policy.  | Policy-Related Constituents     | No            | Yes                   | Yes                  |
| Related MediaXrefs                          | Media Cross Reference Grid where Media records related to an insurance policy can be linked.  | Insurance Policies /Media Xrefs | No            | No                    | Yes                  |
| Remarks                                     | Any notes or comments about an insurance policy.  | Insurance Policies              | No            | No                    | Yes                  |
| <a href="#">Text Entries</a>                | Text entries related to an insurance policy.  | Insurance Policies/Text Entries | No            | No                    | Yes                  |
| Total Value                                 | The total value for all objects covered by a policy. Refer to <a href="#">Insurance Policy Valuations</a> .   | Insurance Policies              | No            | No                    | Yes                  |

# Insurance Policy Valuations

The sum of **Insurance Values** from the individual Insurance Policy Objects is used to populate the *Total Objects Value*. The *Objects* field is automatically populated with the number of objects included in the policy.

If the policy value does not need to be calculated from or into a foreign currency:

1. Select **Transfer Total Value (arrow)** above the *Total Objects Value* field to transfer the total to the *Policy Local Value* field.

If the policy value needs to be calculated from one currency to another, or to calculate the exchange rate, follow the appropriate steps below.

## To calculate the value of the insurance policy from a foreign currency into the local currency:

1. Select the **Direction arrow** so that it is pointing to the left.
2. Select a currency from the pull-down list in the *Currency* field.
3. Enter the value in the *Policy Currency Value* field.
4. Enter the exchange rate in the *Exchange Rate* field.
5. Select **Calculate (wand)** in the upper right above the *Policy Local Value* field.

## To calculate the value of the insurance policy into a foreign currency:

1. Select the **Direction arrow** so that it is pointing to the right.
2. Select **Transfer Total Value (arrow)** above the *Total Objects Value* field to transfer the total to the *Policy Local Value* field.
3. Enter an *Exchange Rate*.
4. Select **Calculate (wand)** in the upper right above the *Policy Currency Value* field.
5. Select a currency from the pull-down list in the *Currency* field.

## To calculate the exchange rate:

1. Select **Transfer Total Value (arrow)** above the *Total Objects Value* field to transfer the total to the *Policy Local Value* field.
2. Enter the value in the *Policy Currency Value* field.
3. Select **Calculate (wand)** in the upper right above the *Exchange Rate* field.

For security settings, see **Calculating and Converting Insurance Policy Totals** on the [Insurance Policies Module Security](#) page.

# Insurance Policy-Object Data

In the [Insurance Policies Hierarchy Tree](#), select the Objects node.

Select a node labeled with the **Object Number and Title**. The fields listed below will display in a [Data Form \(Data Entry View\)](#). Changes to these fields will *not* be reflected in the Object record.

## Insurance Policy-Object fields

| General Fields  | Description  | Context                 | User Defined? | Authority Controlled? | On System Data Form? |
|-----------------|--|-------------------------|---------------|-----------------------|----------------------|
| Insurance Value | selected from <a href="#">Insurance Policy Object Valuations</a> | Insurance Policy Object | No            | No                    | Yes                  |
| Remarks         | Remarks regarding the Object linked to the Insurance Policy      | Insurance Policy Object | No            | No                    | Yes                  |

For security settings, see **Insurance Policy-Object Fields** on the [Insurance Policies Module Security](#) page.

# Insurance Policy Object Valuations

In an Insurance Policy record, the Insurance Value for an individual linked Object can be selected from a dropdown list of values. The values available for selection are those that were entered for the Object in [Object Valuations](#) and [Loan Object Valuations](#).

## Assigning Valuations to Objects in an Insurance Policy

1. In an Insurance Policy record, in the [Insurance Policies Hierarchy Tree](#), expand the Objects node and select the object for which a value should be set.
2. Navigate to the *Insurance Value* field on a [Data Form \(Data Entry View\)](#).
3. Choose a value from the dropdown list.
4. Once an Insurance Value has been selected, the value will be added to the Policy Total Value used in [Insurance Policy Valuations](#).

For security settings, see **Selecting Object Insurance Values** on the [Insurance Policies Module Security](#) page.

# Linked Data (From Records Linked to Insurance Policies)

In an Insurance Policy record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Insurance Policies Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Constituent and Media records are also available in the [Main Insurance Policy Record](#) in the [Linked Constituent References \(ConXRef\)](#) and [Linked Media References \(MediaXRef\)](#) widgets. Select the top tree node to access them.

## Link-Related Fields

When an Insurance Policy is linked to records in other modules, information is generated that pertains to the link.

The following fields pertain to the *link* between an Insurance Policy record and a record from another module. These fields are not part of either the Insurance Policy record or the linked record, and only exist when the records are linked.

- [Linked-Constituent \(ConXRef\) Data](#)
- [Linked-Media \(MediaXRef\) Data](#)
- [Insurance Policy Object Data](#)

# Insurance Policies Hierarchy Tree

The **Insurance Policies Hierarchy Tree** provides access to all [core Insurance Policy data](#), including data that is linked from other modules.

The data that displays in the center panel is determined by the tree node that is selected. The main Insurance Policy record is represented in the top node, with child nodes representing modules. Some child nodes have their own child nodes for individual records.

## Insurance Policies Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Insurance Policies Hierarchy Tree Layout

### Insurance Policy (top node)

Objects

(Object Number + Artist/Maker + Object Name + Title + Object Display Date)

Media

# Add New Insurance Policy Record

To create a new Insurance Policy record, follow the steps to [add a new record](#) from the toolbar.

## Fields Required When Adding New Insurance Policy Records

| Field         | Description  | Notes   |
|---------------|--|---|
| Policy Number | A unique number for identifying an Insurance Policy. | Type the new Insurance Policy Number in the field. The (...) button may be used to generate a sequential number that will append to the end of the text string typed. How Insurance Policy Numbers are recorded depends on an institution's numbering convention. An example of how this could work is if Insurance Policy numbers begin with the year, followed by a ".", and then using the "..." button to generate the next number available, for example, 2023.1 |
| Department    | A list of Insurance Policy Departments.              | A description of this field is available in the list of <a href="#">main Insurance Policy record fields</a> .   |

For security settings, see **Creating Insurance Policy Records** on the [Insurance Policies Module Security](#) page.

# Batch Update Insurance Policy Records

Updating a group of records can be performed on the following Insurance Policy record fields:

- [Text Entries](#)

To update a group (batch) of Insurance Policy records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Insurance Policy Records** on the [Insurance Policies Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Delete Insurance Policy Records

The process to [delete a record](#) is the same in Insurance Policies as in other modules.

When attempting to delete an Insurance Policy record, the [Insurance Policy Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Insurance Policy must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Insurance Policy Records** on the [Insurance Policies Module Security](#) page.

# Insurance Policy Usage Report

When deleting an Insurance Policy record, its usage will display in an Insurance Policy Usage Report. Any usage of the Insurance Policy record that prevents it from being deleted will display in red.

## Links to the following record(s) in other modules

Object record(s)

Media record(s)

## Usage in Other TMS Products:

If there is a valid license for other TMS Suite products, or there was a previous license for **TMS for Windows**, the Usage report will list records from those products that are linked to the Object.

### **TMS Conservation Studio**

- Project record(s)

### **TMS Media Studio**

- Project record(s)

# Edit/View Insurance Policy Records

Select an Insurance Policy record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Insurance Policies module: [Open Package Records](#) (from the Package panel or Manage Package Folders)

The method for viewing and editing Insurance Policy records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Insurance Policy Records** on the [Insurance Policies Module Security](#) page.

# Link Insurance Policy to Records in Other Modules

Insurance Policy records may be [linked to records from other modules](#).

Data that pertains to a linked record is considered part of the Insurance Policy Main data ([data linked to Insurance Policy from other modules](#)).

In the Insurance Policy record, linking to records in other modules is performed by selecting either the top node, or the node labeled with the module name in the [Insurance Policies Hierarchy Tree](#).

## Link Records in Another Module to the Current Insurance Policy Record

The records from other modules may be linked to an Insurance Policy using several different methods:

- [Link an existing record](#)
- To link Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget (select the top tree node)
- To link Media records, use the [Linked Media References \(MediaXRefs\)](#) widget (select the top tree node)
- To link Object records, additional options are [Linking Objects using Package or Object Working List](#)

## Unlink a Record

Follow the steps to [Unlink a record](#).

For security settings, see linked pages above and **Linking Objects to Insurance Policy Records** on the [Insurance Policies Module Security](#) page.

# Navigate to Records Related to the Insurance Policy

Navigation to records that are linked to the Exhibition can be performed 2 ways:

[Toolbar option for records related to Insurance Policies](#)

[Opening records from a List View displaying linked records](#)

# Related Records (Toolbar) for Insurance Policies

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Insurance Policy record or the entire current record selection.

| Navigation Option           | Module       | Create link using   | View link other module   |
|-----------------------------|--------------|---|--|
| Policy-Related Constituents | Constituents | <a href="#">Policy-Related Constituents widget</a>  | <a href="#">Constituents Hierarchy Tree</a> > Related Records > Insurance Policies |
| Related Media               | Media        | <a href="#">Insurance Policies Hierarchy Tree</a> > Media node or <a href="#">Related MediaXrefs widget</a> | Not visible in Media module.   |
| Related Objects             | Objects      | <a href="#">Insurance Policies Hierarchy Tree</a> > Objects node  | <a href="#">Objects Hierarchy Tree</a> > Insurance Policies node                   |

# Loans

The Loans Module manages Incoming and Outgoing Loans. Each Loan record serves as a representation of a Loan request or agreement.

The Objects included in a Loan can be linked to the Loan record, and information about the Objects with respect to the Loan, such as Object Loan Status or Insurance Values, can be tracked.

Shipment records for Objects can be linked and viewed from a Loan record.

If a Loan is part of an Exhibition, the related Exhibition record can be linked to the Loan record. Information about the Exhibition's Objects and Venues can be viewed from the Loan record.

A list of the fields available for viewing or editing in the Loans module is in [Loan Data](#).

The [Loans Hierarchy Tree](#) provides a hierarchical view of a Loan record, and has functionality for adding data and linking other records.

# Loan Data

Loan records have many categories of data directly related to the Loan itself. The core Loan data is divided into the main (or module-level) context, and multiple sub-categories, or sub-contexts.

The different contexts of a Loan record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#), or a specific tree node.

## Loan contexts

| Context   | Node or Tree                        | Fields  |
|---|-------------------------------------|---|
| <a href="#">Main Loan Record</a>                  | Top node                            | Data in the main Loan record and some sub-categories  |
| <a href="#">Linked records from other modules</a> | Node labeled with module name       | Fields related to the link between the records; in some cases, the linked record itself may be edited   |
| <a href="#">Associated Loan Records</a>           | Node labeled with relationship name | Fields related to the relationship; for each type of relationship, records are in a read-only List View |

In some Loan contexts, there may be buttons on a Data Form that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseum Lookup](#)). These widgets are not included on any field lists since they are not part of any record.

# Main Loan Record

The main Loan record is accessed by selecting the top node of the [Loans Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the fields available belong to sub-categories, or sub-contexts, but do not require the selection of a separate node or tree. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

The same fields are available for both Incoming and Outgoing Loan records.

## Loan Record Fields

| Field                                    | Description  | Context  | User Defined? | Authority Controlled?                       | On System Data Form? |
|--|--|--|---------------|---|----------------------|
| Approved By                              | The name of person or institution that approved a loan.  | Loans  | No            | No  | Yes                  |
| <a href="#">Attributes</a>               | Thesaurus controlled terms related to a Loan. Also known as ThesXRefs.   | Loans /Attributes  | Yes           | Yes   | Yes                  |
| Date Approved                            | The date that a loan was approved.   | Loans  | No            | No  | Yes                  |
| Date Requested                           | The date that the loan was requested.  | Loans  | No            | No  | Yes                  |
| Depositer Designee                       | The individual designated to deliver the Objects in the Loan.  | Loans  | No            | No  | No                   |
| Depositer/Owner                          | The owner or deliverer of the Loan Objects.  | Loans  | No            | No  | No                   |
| Description                              | A description of the Loan.   | Loans  | No            | No  | Yes                  |
| Display Begin Date                       | The beginning date that objects in a loan are on display.  | Loans  | No            | No  | Yes                  |
| Display Date Qualifier                   | A qualifier value for the loan display begin and end dates, such as Pending or Confirmed.  | Loans  | No            | No  | Yes                  |
| Display End Date                         | The end date that objects in a loan are on display.  | Loans  | No            | No  | Yes                  |
| <a href="#">Flex Fields</a>              | Flex Fields are “flexible” or user-created fields that are configured in the <a href="#">TMS Suite Application Configuration Utility</a> . All <b>ungrouped</b> flex fields for a record display together in a “container.”<br><br><b>Grouped</b> Flex Fields are related and can include workflow and approval information. A Flex Field group displays in its own container. | Outgoing loan insurance Flex Field Xrefs<br><br>OR<br><br>Incoming loan insurance Flex Field Xrefs | Yes           | Depends on configuration of the Flex Field. | No                   |
| Foreign Borrower<br>OR<br>Foreign Lender | Indicates that a borrower (for an Outgoing Loan) or lender (for an Incoming Loan) lives in a foreign country.  | Loans  | No            | No  | Yes                  |
| Has Special Requirements                 | Indicates that a loan has special requirements from a party involved in the loan, such as the lender, borrower, or organizer. Checking this box enables the <i>Special Requirements</i> free text field.   | Loans  | No            | No  | Yes                  |
| Insurance Contact                        | The contact information or notes about who to contact for any questions regarding insurance policies or requirements regarding a loan, such as the agent of the insurer providing the policy.  | Loans  | No            | No  | Yes                  |
| Insurance Remarks                        | Any notes about the insurance requirements related to this loan.   | Loans  | No            | No  | Yes                  |
| Light Exposure Days per Week             | The number of days per week that objects in a loan may be exposed to light.  | Loans  | No            | No  | Yes                  |
| Light Exposure Hours per Day             | The number of hours per day that objects in a loan may be exposed to light.  | Loans  | No            | No  | Yes                  |
| Loan Agreement Received                  | The date that a loan agreement was received.   | Loans  | No            | No  | Yes                  |
| Loan Agreement Sent                      | The date that a loan agreement was sent.   | Loans  | No            | No  | Yes                  |
| Loan Begin Date                          | The date that a loan begins.   | Loans  | No            | No  | Yes                  |
| Loan Conditions                          | Conditions specified by a lender regarding a loan.   | Loans  | No            | No  | Yes                  |
| Loan Date Qualifier                      | A qualifier value for the loan begin and end dates, such as Pending or Estimated.  | Loans  | No            | No  | Yes                  |
| Loan End Date                            | The date that a loan ends.   | Loans  | No            | No  | Yes                  |

|  |   |  |     |     |     |
|--|---|--|-----|-----|-----|
| Loan Number  | A unique, identifying number for a Loan record. May have a sequential number generated.   | Loans  | No  | No  | Yes |
| Loan Purpose   | The reason for a loan, such as Acquisition Consideration, Exhibition, Long-term Loan, or Study.   | Loans  | No  | Yes | Yes |
| Loan Renewal Date  | The date that a loan was renewed.   | Loans  | No  | No  | Yes |
| Loan Status  | The status of the loan, such as Pending, Awaiting Approval, Closed, or Denied. Also known as Overall Loan Status.<br><br>In TMS Composer the field is labeled as Overall Loan Status.   | Loans  | No  | Yes | Yes |
| Loan Type  | The type of loan, such as Incoming, Outgoing, or Special Exhibition.<br><br>This field serves as the Loan department and thus determines the <a href="#">security</a> for a Loan.   | Loans  | No  | Yes | Yes |
| Outgoing Loan-Related Constituents<br><br>OR<br><br>Incoming Loan-Related Constituents                               | Linked Constituent records for people associated with a loan, such as a registrar or curator. The Primary Lender or Borrower is linked by default.<br><br>For either, refer to <a href="#">Linked Constituent References (ConXRefs)</a>   | Outgoing-Loan-Related Constituents<br><br>OR<br><br>Incoming-Loan-Related Constituents | No  | Yes | Yes |
| Mnemonic   | An abbreviated version of the Loan Number. The Loan Number is added as the mnemonic value by default.   | Loans  | No  | No  | Yes |
| Original Loan End Date   | The original end date for a loan if the actual end date changes.  | Loans  | No  | No  | Yes |
| Primary Lender and Lender Address (Constituent)<br><br>OR<br><br>Primary Borrower and Borrower Address (Constituent) | Constituent Name and Address of the Primary Lender (for Incoming Loans) or Primary Borrower (for Outgoing Loans). The available addresses in the list are created in the Constituent record of the Borrower or Lender.<br><br>For either, refer to <a href="#">Linked Constituent References (ConXRefs)</a> | Loans/Primary Lender /Borrower   | No  | Yes | Yes |
| <a href="#">Linked Media References (MediaXRefs)</a>   | Media Cross Reference Grid where Media records related to a loan can be linked.   | Loans/Media Xrefs  | No  |     | Yes |
| Remarks  | Any notes about a loan.   | Loans  | No  | No  | Yes |
| Requested By   | The name of the person or institution requesting a loan.  | Loans  | No  | No  | Yes |
| <a href="#">Single-Value Text Entries (Web Application field)</a>  | User-defined fields that provide the option to save formatted text. Only a single field can be entered.   | Loans/Text Entries   | Yes | No  | No  |
| Special Requirements   | Notes about special requirements of a loan. This field becomes enabled when the <i>Has Special Requirements</i> box is checked.   | Loans  | No  | No  | Yes |
| <a href="#">Statuses (ThesXRefs)-Active</a>  | Thesaurus controlled terms linked to a Loan record. Also known as "ThesXRefs".  | Loans /Statuses-Active   | Yes | Yes | Yes |
| <a href="#">Text Entries</a>   | User-defined fields that provide the option to save formatted text. Multiple fields may be entered, and display in a grid on records.   | Loans/Text Entries   | Yes | Yes | Yes |

# Loan-Object Data

Select the **Objects** tree node. A list of all Object records linked to the Loan will display in a read-only [List View](#).

Select a node labeled with the **Object Number and Title**. The fields listed below will display in a [Data Form \(Data Entry View\)](#). Changes to these fields will *not* be reflected in the Object record.

The same fields are available for Loan Objects in both Incoming and Outgoing Loan records.

## Loan Object Fields

| General Fields                                   | Description  | Context           | User Defined? | Authority Controlled? | On System Data Form? |
|--|--|-------------------|---------------|-----------------------|----------------------|
| Catalogues                                       | Catalogue requests associated with an object in a loan, such as Lender requests two copies.  | Loan Object Xrefs | No            | No                    | Yes                  |
| Conditions                                       | Any conditional requirements related to an object in a loan.   | Loan Object Xrefs | No            | No                    | Yes                  |
| Conservation Fee                                 | A monetary amount for the cost of conservation treatment for an object in a loan.  | Loan Object Xrefs | No            | No                    | Yes                  |
| Cons. Fee Paid Date                              | The date that the conservation treatment fee was paid.   | Loan Object Xrefs | No            | No                    | Yes                  |
| Courier Required                                 | Specifies whether or not a courier is required to transport an object in a loan.   | Loan Object Xrefs | No            | No                    | Yes                  |
| Courier Requirements                             | Notes pertaining to the requirement of a courier in transporting an object in a loan. This field is enabled if the <i>Courier Required</i> box is checked.   | Loan Object Xrefs | No            | No                    | Yes                  |
| Crate Fee  | A monetary amount for the cost of crating an object in a loan.   | Loan Object Xrefs | No            | No                    | Yes                  |
| Crate Paid Date                                  | The date that the crate fee was paid.  | Loan Object Xrefs | No            | No                    | Yes                  |
| Date Requested (Object)                          | The date that an object was requested to be part of a loan.  | Loan Object Xrefs | No            | No                    | Yes                  |
| Description                                      | A description of the object in relation to the loan.   | Loan Object Xrefs | No            | No                    | Yes                  |
| Fee Billing Remarks                              | Any notes regarding the billing of fees of an object in a loan.  | Loan Object Xrefs | No            | No                    | Yes                  |
| <a href="#">Flex Fields or Flex Field Groups</a> | Flex Fields related to an object in a loan, such as Grouped Flex Fields for approvals.   | Loan Object Xrefs | Yes           |                       | No                   |
| Insurance Fee                                    | A monetary amount for the insurance fee for an object in a loan.   | Loan Object Xrefs | No            | No                    | Yes                  |
| Insurance Fee Paid Date                          | The date that the insurance fee was paid.  | Loan Object Xrefs | No            | No                    | Yes                  |
| Insurance Value                                  | An insurance value of an object in regards to a loan. Insurance value entries from the Object record will display as options to select from, or a new insurance value entry may be created. <a href="#">Loan Object Valuations</a> | Loan Object Xrefs | No            | No                    | Yes                  |
| Lender Credit Line                               | The credit line for an object that is provided by the lender.  | Loan Object Xrefs | No            | No                    | Yes                  |

|   |   |                   |     |     |  |
|---|---|-------------------|-----|-----|--|
| Lender Object Number  | An Object Number assigned by a lender, such as a lender's Accession Number.   | Loan Object Xrefs | No  | No  | Yes on Incoming Loan Object Data Form; No on Outgoing Loan Object Data Form. |
| Light Exposure per Hour(lx)                                       | The amount of light in lux that an object may be exposed to per hour.   | Loan Object Xrefs | No  | No  | Yes  |
| Loan Fee  | A monetary amount for a fee charged for an object in a loan.  | Loan Object Xrefs | No  | No  | Yes  |
| Loan Fee Paid Date  | The date that the <i>Loan Fee</i> was paid.   | Loan Object Xrefs | No  | No  | Yes  |
| LoanObj Status  | The status of an object in relation to a loan, such as Requested, Approved, Returned.   | Loan Object Xrefs | No  | Yes | Yes  |
| LoanObj Status Date   | The date that a <i>LoanObj Status</i> value was added or updated.   | Loan Object Xrefs | No  | No  | Yes  |
| LoanObj Status Notes  | Any notes related to the value in the <i>LoanObj Status</i> field.  | Loan Object Xrefs | No  | No  | Yes  |
| Other Fees  | A monetary amount for miscellaneous fees of an object in a loan.  | Loan Object Xrefs | No  | No  | Yes  |
| Other Fees Paid Date  | The date that the <i>Other Fees</i> were paid.  | Loan Object Xrefs | No  |     | Yes  |
| Photography   | Photography requests associated with an object in a loan, such as Lender requests high resolution image.  | Loan Object Xrefs | No  | No  | Yes  |
| Remarks   | Any notes related to an object in relation to a loan.   | Loan Object Xrefs | No  | No  | Yes  |
| <a href="#">Single-Value Text Entries (Web Application field)</a> | User-defined fields that provide the option to save formatted text. Only a single field can be entered.   | Loan Object Xrefs | Yes |     | No   |
| Special Conditions  | Any special conditions for an object in a loan.   | Loan Object Xrefs | No  | No  | Yes  |
| Special Requirements  | Any special requirements for an object in a loan.   | Loan Object Xrefs | No  | No  | Yes  |
| Statuses-Active - Loan Object Xrefs                               | Thesaurus controlled status terms related to conditions set for an object in a loan, such as Pending, Approved, or Fees Paid.   | Loan Object Xrefs | Yes | Yes | Yes  |
| <a href="#">Text Entries</a>                                      | Fields of text or HTML content that are linked to the Loan Object.  | Loan Object Xrefs | Yes |     | Yes  |
| Third-party Valuation   | A third-party appraiser valuation of an object in regards to a loan. Third party Valuation entries from the Object record will display as options to select from, or a new valuation entry may be created. <a href="#">Loan Object Valuations</a> . | Loan Object Xrefs | No  | No  | Yes  |

For security settings, see **Loan Object Fields** on the [Loans Module Security](#) page.

# Loan Object Valuations

In Loans, linked Objects have 2 types of valuations that are specific to Loans: *Insurance Value* and *Third-party Valuations*.

**Insurance Value** is the value of an Object with regard to a Loan.

**Third-party Valuation** is also the value of an Object with regard to a Loan, but is assigned by a third-party appraiser.

In a Loan Object record, both types of valuations are displayed as the Local Value, with the **Currency Value** or "Stated Value" displayed beneath.

There are 3 methods for assigning a value to the Insurance Value or a Third-party Appraisal:

- Add a new Valuation
- Edit the current value
- Assign a value from a list of [existing Object Valuations](#)

## Add a new Insurance Value or a Third-party Appraisal Valuation to a Loan Object

1. In the [Loans Hierarchy Tree](#), expand the **Objects node**.
2. Select a specific **Object**.
3. Select **Edit** in the **Insurance Value** or **Third-party Appraisal** widget.
4. In the selected widget, enter any required values. The fields are the same as in [Object Valuations](#).
5. Select **Save**.
6. The *Stated Value* (for Insurance Value) or *Stated Date* (for Third-party Appraisal) will now display in the selected widget.

## Edit the current valuation for a Loan Object

1. In the [Loans Hierarchy Tree](#), expand the **Objects node**.
2. Select a specific **Object**.
3. In **Insurance Value** or **Third-party Appraisal**, select **Edit**.
4. The following message will display: "This is an object value entered from Object Valuation/Insurance. Editing will create a copy of the original value," select OK.
5. Enter new values for the fields being modified
6. Re-calculate **Currency Value (Stated Value)**, **Exchange Rate**, and/or **Local Value** if needed
7. Select **Save**.
8. In **Insurance Value**, changes to the **Insurance Value (Local Value)** and **Stated Value (Currency Value)** will display. In **Third-party Appraisal**, the **Stated Date** will be updated if it was modified.

New Valuations created in the Loans module will *not* display on the Object record. They are only available for [Shipment Object Valuations](#). Object Valuations that are edited also will *not* display on the Object record. They are for use only in the Loan record, and if replaced by a different valuation, will be deleted.

## Assign an existing Object Valuation to a Loan Object

1. In the [Loans Record Hierarchy Tree](#), expand the **Objects node**.
2. Select a specific Object.
3. Expand the **Valuation list**. The list will contain any valuations created in the Object record ([Object Valuations](#)).
4. **Select** an Object Valuation from the list.
5. The *Stated Value* (for Insurance Value) or *Stated Date* (for Third-party Appraisal) will now display in the selected widget.

## Delete an Object Valuations from a Loan Object

1. Expand the Objects node in the record hierarchy tree.
2. Select a specific object.
3. Navigate to the *Insurance Value* and/or *Third-party Valuation* widgets on a Data Entry View.
4. In the desired field, select a value to delete from the pull-down list.
5. Click the **Remove x** button to the right of the field.

**Note:** If the value was created in the Loans module clicking the delete button will delete the value from the database. If the value was created in the Objects module, clicking the delete button will remove the value from the Loan record, but the value will not be deleted from the Object record.

For security settings, see **Object Value** on the [Objects Module Security](#) page and **Loan Object Fields** on the [Loans Module Security](#) page.

# Linked Data (From Records Linked to Loans)

In a Loan record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Loans Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Constituent and Media records are also available in the [Main Loan Record](#) in the [Linked Constituent References \(ConXRef\)](#) and [Linked Media References \(MediaXRef\)](#) widgets. Select the top tree node to access them.

## Link-Related Fields

When a Loan is linked to records in other modules, information is generated that pertains to the link.

The following fields pertain to the *link* between a Loan record and a record from another module. These fields are not part of either the Loan record or the linked record, and only exist when the records are linked.

- [Linked-Constituent \(ConXRef\) Data](#)
- [Linked-Media \(MediaXRef\) Data](#)
- [Loan-Exhibition Data\\*](#)
- [Exhibition-Loan Data\\*](#)
- [Shipment-Loan Data\\*](#)
- [Loan-Object Data](#)

\* The data is read only in this module. It must be accessed in the linked record in the other module.

# Loan-Exhibition Data

In the Loans Hierarchy Tree, select the **Exhibitions** node. A list of all Exhibitions linked to the current Loan record will display in a read-only [List View](#).

Select a node labeled with the **Exhibition Title**. A preconfigured [Data View](#) will display on the right.

The Data View will contain fields pertaining to the linked Exhibition and its Loan Objects.

## Loan Exhibition Data View (all data is read-only)

| Type of data           | Description  |
|------------------------|--|
| Exhibition data        | Fields from the <a href="#">Main Exhibition Record</a> |
| Exhibition Object data | Fields from the <a href="#">Main Object Record</a>     |

For security settings, see **Loan-Exhibition Data** on the [Loans Module Security](#) page.

# Associated Loan Records

In the [Loans Hierarchy Tree](#), select the node labeled with the relationship name (Parent Records, Child Record, or See Also Records) to access related fields in a read-only [List View](#).

# Loans Hierarchy Tree

The **Loans Hierarchy Tree** provides access to all [core Loan data](#), including data that is linked from other modules.

The data that displays in the center panel is determined by the tree node that is selected. The main Loan record is represented in the top node, with child nodes representing modules or types of Loan data. Some child nodes have their own child nodes for individual records.

## Loans Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Loans Hierarchy Tree Layout

### Loan (top node)

- Objects  
(Object Number + Artist/Maker + Object Name + Title + Object Display Date)
- Exhibitions  
Exhibition Title
- Constituents
- Media
- Shipments\*
- Parent Records\*  
Relationship Name
- Child Records\*  
Relationship Name
- See Also Records\*  
Relationship Name



Nodes marked with \* will only display if a link or association exists with the current Loan record.

# Loans Record Hierarchy Tree (Diagram)

Loans Record Hierarchy Tree with available menus.

Nodes marked with \* will only display if a link or association exists with the current Loan record.

## Loan (top node)

Node Menu:

- Delete Loan
- Add Loan to a shipment

## Objects

Node Menu:

- Add Object to Loan
- Add Object(s) to Loan using Package
- Add Object Working List Items to Loan

List View Menu:

- Remove selected Object(s) from the Loan
- Batch Update selected Loan Object Xrefs
- Batch Update all records

## Individual Objects\*

Node Menu:

- Remove Object from Loan

## Exhibitions

Node Menu:

- Add Exhibition to Loan

## Individual Exhibitions\*

Node Menu:

- Remove Exhibition(s) from Loan

## Exhibition Objects\*

### Exhibition Objects in Loan\*

List View Menu:

- Remove selected Exhibition Object(s) from Loan

### Exhibition Objects not in Loan\*

List View Menu:

- Add selected Exhibition Object(s) to Loan

## Constituents

## Media

Node Menu:

- Link Media Record

List View Menu:

- Remove Selected Media Record Links(s)

## Shipments\*

Node Menu:

- Add a loan to a shipment

List View Menu:

- Remove loan from selected Shipment(s)

# Add New Loan Record

To create a Loan record, follow the steps to [add a new record](#) from the toolbar.

## Fields Required When Adding New Loan Records

| Field                               | Description  | Notes   |
|-------------------------------------|--|---|
| Loan Number                         | A unique, identifying number for a Loan record.  | Type the new Loan Number in the field. The (...) button may be used to generate a sequential number that will append to the end of the text string typed. How Loan Numbers are recorded depends on an institution's numbering convention. An example of how this could work is if numbers for incoming loans start with <i>IL.</i> followed by the current year, and then a sequential number, such as <i>IL.2020.002</i> |
| Loan Type                           | A list of preconfigured Loan Types (Departments).  | A description of this field is available in the list of <a href="#">main Loan record fields</a> .   |
| Primary Borrower (Outgoing Loans) * | Linked Constituent record for the person or institution that is the Primary Borrower for a Loan. | Refer to <a href="#">Linked Constituent References (ConXrefs)</a>   |
| Primary Lender (Incoming Loans) *   | Linked Constituent record for the person or institution that is the Primary Lender for a Loan.   | Refer to <a href="#">Linked Constituent References (ConXrefs)</a>   |

\*A Constituent record must be linked as a Primary Lender/Borrower when a Loan record is created. The Primary Lender/Borrower cannot be deleted once the Loan record is created, but can be changed to a different Constituent.

## Update Primary Lender/Borrower

1. In the Primary Lender/Borrower widget, select . The Constituent Search window opens.
2. Begin entering the **Constituent Name**, suggested results will display in a list.
3. Select a Constituent from the list, then choose **SELECT**. The Primary Lender/Borrower name will be updated.

For security settings, see [Creating Loan Records](#) and [Updating Primary Lender/Borrower](#) on the [Loans Module Security](#) page.

# Associate Loan with Another Loan

See [Associate \(Link\) Records from the Same Module](#).

# Batch Update Loan Records

Updating a group of records can be performed on the following Loan record fields:

- [Attributes \(ThesXRefs\)](#)
- [Flex Field](#)
- [Flex Field Group](#)
- Loan Type (Departments)
- [Statuses \(ThesXRefs\)](#)

To update a group (batch) of Loan records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Loan Records** on the [Loans Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Batch Update Loan Objects

The following fields are available for updating in a batch (group) of Objects linked to the current Loan record:

- Catalogues
- Conditions
- Cons. Fee Paid Date
- Courier Required
- Crate Paid Date
- Date Requested (Object)
- Description
- Fee Billing Remarks
- Insurance Fee Paid
- Lender Credit Line
- Lender Object Number
- Light Exposure Lux per Hour
- Loan Fee Paid Date
- Loan Object Status
- LoanObj Status Date
- LoanObj Status Notes
- Other Fees Paid Date
- Photography
- Remarks
- Special Conditions
- Special Requirements

To update the Object records linked to a Loan record, follow the steps to [Batch Update Linked Records](#).

For security settings, see **Batch Updating Loan Objects** on the [Loans Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Delete Loan Records

The process to [delete a record](#) is the same in Loans as in other modules.

When attempting to delete a Loan record, the [Loan Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Loan must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Loan Records** on the [Loans Module Security](#) page.

# Loan Usage Report

When deleting a Loan record, its usage will display in a Loan Usage Report. Any usage of the Loan record that prevents it from being deleted will display in red.

## Links to the following record(s) in other modules

Object record(s)

Exhibition record(s)

Media record(s)

Shipment record(s)

[Constituent record\(s\)](#)

## Usage in Other TMS Products:

If there is a valid license for other TMS Suite products, or there was a previous license for **TMS for Windows**, the Usage report will list records from those products that are linked to the Object.

### **TMS Conservation Studio**

- Project record(s)

### **TMS Media Studio**

- Project record(s)

# Edit/View Loan Records

Select a Loan record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Loans module: [Open Package Records](#) (from the Package panel or Manage Package Folders)

The method for viewing and editing Loan records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Loan Records** on the [Loans Module Security](#) page.

# Link Loan to Records in Other Modules

Loan records may be [linked to records in other modules](#).

Data that pertains to the link between the Loan and the other record is considered part of the Loan Main data ([data linked to Loan from other modules](#)).

In the Loan record, linking to records in other modules is performed by selecting either the top node, or the node labeled with the module name in the [Loans Hierarchy Tree](#).

A Loan's *Objects* can be linked to any Exhibitions that are *already* linked to the Loan. Refer to [Link Loan Objects to the Exhibition](#).

## Link Records in Another Module to the Current Loan Record

In a Loan record, records from other modules may be linked to the Loan using several different methods:

- [Link an existing record](#)
- [Add a new record to link](#)
- To link Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget (select the top tree node)
- To link Media records, use the [Linked Media References \(MediaXRefs\)](#) widget (select the top tree node)
- To link Object records, additional options are [Linking Objects using Package or Object Working List](#)
- To link the Objects in a linked Exhibition, refer to [Loans - Link Exhibition Objects](#).

## Unlink a Record

Follow the steps to [Unlink a record](#).

For **security settings**, see individual linked pages above.

# Link Shipments to Loan Records

**Shipment** records related to Objects in a Loan can be linked to Loan records. In a Loan record, linked shipments display in the [Loans Hierarchy Tree](#) under the Shipments node. The number displayed at the end of the Shipments node indicates how many Shipment records are linked to the loan.

## Add Shipment to Loan Record

Shipments can be linked to Loan records in one of two ways:

[Link an Existing Record](#)

[Add a New Record to Link](#)

## Remove Shipment from Loan Record

Follow the steps to [Unlink a Record](#).

## Exclude Loan Objects from Shipment

When a shipment is linked to a Loan record, the Loan Objects are automatically *included* in the shipment. To remove Loan Objects from the Shipment follow the steps to [remove loan objects from a linked Shipment record](#).

For security settings, see **Linking a Shipment to a Loan Record** on the [Loans Module Security](#) page, as well as **Creating Shipping Records**, **Linking Loan Constituent to a Shipment Record**, and **Linking Objects to Shipment Records** on the [Shipping Module Security](#) page.

# Navigate to Records Related to the Loan

Navigation to records that are linked to the Exhibition can be performed 2 ways:

[Toolbar option for records related to Loan\(s\)](#)

[Opening records from a List View displaying linked records](#)

# Related Records (Toolbar) for Loans

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Loan record or the entire current record selection.

| Navigation Option    | Module       | Create link using   | View link other module  |
|----------------------|--------------|---|---|
| Related Constituents | Constituents | <a href="#">Loan-Related Constituents widget</a>                  | <a href="#">Constituents Hierarchy Tree</a> > Related Records > Incoming or Outgoing Loans node |
| Related Exhibitions  | Exhibitions  | <a href="#">Loans Hierarchy Tree</a> > Exhibitions node           | <a href="#">Exhibitions Hierarchy Tree</a> > Incoming or Outgoing Loans node                    |
| Related Media        | Media        | <a href="#">Related MediaXrefs widget</a>                         | Not visible in Media module   |
| Related Objects      | Objects      | <a href="#">Loans Hierarchy Tree</a> > Objects node               | <a href="#">Objects Hierarchy Tree</a> > Incoming or Outgoing Loans node                        |
| Related Shipments    | Shipping     | <a href="#">Loans Hierarchy Tree</a> > Top node or Shipments node | <a href="#">Shipping Hierarchy Tree</a> > Loans node  |

# Shipping

The Shipping module is used to record shipping information when objects are sent from or received by an institution. Each Shipment record serves as a representation for a physical shipment. Shipment records contain general information about a shipment, linked objects, constituents, loans, and exhibitions related to a shipment, as well as detailed steps taken through the shipping process.

A list of the fields available for viewing or editing in the Shipping module is in [Shipment Data](#).

The [Shipment Hierarchy Tree](#) provides a hierarchical view of a Shipment record, and has functionality for adding data and linking other records.

# Shipment Data

**Shipment** records have many categories of data directly related to the Shipment itself. The core Shipment data is divided into the main (or module-level) [context](#), and multiple sub-categories, or sub-contexts.

The different contexts of a Shipment record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#), a specific tree node, or an alternate tree layout.

## Shipment contexts

| Context   | Node or Tree                                   | Fields available in Data Form   |
|---|--|---|
| <a href="#">Main Shipment record</a>              | Top node                                       | Data in the main Shipment record and some sub-categories  |
| <a href="#">Shipment Steps Data</a>               | Shipment Steps Alternate Record Hierarchy Tree | Shipment steps-related fields   |
| <a href="#">Linked records from other modules</a> | Node labeled with module name                  | Fields related to the link between the records; in some cases, the linked record itself may be edited |

In some Shipment contexts, on the Data Form, there are widgets that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseumLookup](#)). These widgets are not included on any fields lists since they are not part of any record.

# Main Shipment Record

The main Shipment record is accessed by selecting the top node of the [Shipment Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the fields available belong to sub-categories, or sub-contexts, but do not require the selection of a separate node or tree. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

See [Shipment Steps Data](#) for the list of fields available for recording information about shipment steps.

## Shipment Record Fields

| Field                              | Description   | Context                               | User Defined? | Authority Controlled? | On System Data Form? |
|------------------------------------|---|---------------------------------------|---------------|-----------------------|----------------------|
| Actual Arrival Date                | The actual date that a Shipment arrives.  | Shipments                             | No            | No                    | Yes                  |
| Actual Shipping Date               | The actual date that a Shipment is sent.  | Shipments                             | No            | No                    | Yes                  |
| <a href="#">Attributes</a>         | Thesaurus controlled terms related to a Shipment record. Also known as ThesXRefs.   | Shipments /Attributes                 | Yes           | Yes                   | Yes                  |
| Department                         | The Shipping department to which a Shipment record is assigned. Shipping departments serve as the highest categorical level to which a Shipment record can belong, and control security. Example Shipping departments could be Incoming, Outgoing, Internal, or Between Venues. | Shipments                             | No            | Yes                   | Yes                  |
| Exp. Arrival Date                  | The date that a Shipment is expected to arrive.   | Shipments                             | No            | No                    | Yes                  |
| Exp. Shipping Date                 | The date that a Shipment is expected to be sent.  | Shipments                             | No            | No                    | Yes                  |
| High Value                         | Indicates if a Shipment is of high value.   | Shipments                             | No            | No                    | Yes                  |
| Insurance Remarks                  | Remarks about insurance related to a Shipment record.   | Shipments                             | No            | No                    | Yes                  |
| International                      | Indicates if a Shipment is international.   | Shipments                             | No            | No                    | Yes                  |
| Receipt Number                     | The receipt number for a Shipment as it leaves or enters a building. May be generated automatically or filled in manually.  | Shipments                             | No            | No                    | Yes                  |
| <a href="#">Related MediaXrefs</a> | Media Cross Reference Grid where Media records related to a shipment can be linked.   | Shipments /Media Xrefs                | No            | No                    | Yes                  |
| Remarks                            | Notes about a Shipment record.  | Shipments                             | No            | No                    | Yes                  |
| Request Date                       | The date that a Shipment was requested.   | Shipments                             | No            | No                    | Yes                  |
| Ship From Comment                  | Notes about the sending institution of a Shipment.  | Shipments                             | No            | No                    | Yes                  |
| Ship From Contact                  | The name of the contact person at the sending institution.  | Shipments                             | No            | No                    | Yes                  |
| Ship From Geography                | The place from which a Shipment is sent, such as a city and country.  | Shipments                             | No            | No                    | Yes                  |
| Ship From Name and Address         | Linked Constituent record for the person or entity from which a Shipment will be sent. Record is linked and viewed in the <a href="#">Linked Constituent References (ConXRefs)</a> widget (also referred to as ConXRefs - simple)   | Shipments /Ship From Constituent Name | No            | Yes                   | Yes                  |
| Ship From Phone                    | The phone number at the sending institution of a Shipment.  | Shipments                             | No            | No                    | Yes                  |
| Ship To Comment                    | Notes about the receiving institution of a Shipment.  | Shipments                             | No            | No                    | Yes                  |

|                               |   |                                     |     |     |     |
|-------------------------------|---|-------------------------------------|-----|-----|-----|
| Ship To Contact               | The name of the contact person at the receiving institution.  | Shipments                           | No  | No  | Yes |
| Ship To Geography             | The place to which a Shipment is sent, such as a city and country.  | Shipments                           | No  | No  | Yes |
| Ship to Name and Address      | Linked Constituent record for the person or entity that will receive the Shipment. Record is linked and viewed in the <a href="#">Linked Constituent References (ConXRefs)</a> widget (also referred to as ConXRefs - simple)   | Shipments /Ship To Constituent Name | No  | Yes | Yes |
| Ship To Phone                 | The phone number at the receiving institution for a Shipment.   | Shipments                           | No  | No  | Yes |
| Shipment Number               | <p>A unique, identifying number for a Shipment record.</p> <p>The <i>Shipment Number</i> field is automatically populated with a value that begins with the prefix <i>SH</i> followed by the year and a hyphen, and the next sequential number for the Shipment record created in the year.</p> <p>The Shipment Number may be updated to a custom value if needed. The (...) button may be used to generate a sequential number that will append to the end of the text string typed. How Shipment Numbers are recorded depends on an institution's numbering convention.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;">  The default Shipment Number prefix is <i>SH</i>. If another prefix is preferred, it can be customized in <a href="#">TMS Configuration Settings</a> by going to Manage &gt; Configurations &gt; Shipments &gt; ShipmentNumberPrefix. </div> | Shipments                           | No  | No  | No  |
| Shipment Purpose              | The purpose of a Shipment, such as Appraisal, Display, Exhibition, or Conservation.   | Shipments                           | No  | Yes | Yes |
| Shipment Status               | The status of a Shipment, such as Current, Pending, Delayed, or Completed.  | Shipments                           | No  | Yes | Yes |
| Shipment Type                 | The type of Shipment, such as Incoming Loan, Return Loan, Deaccession, or Transition.   | Shipments                           | No  | Yes | Yes |
| Shipment-Related Constituents | Linked Constituent records for people or entities associated with the Shipment other than those listed in the Ship From and Ship To fields, such as Shippers, or Couriers. Record is linked and viewed in the <a href="#">Linked Constituent References (ConXRefs)</a> widget (also referred to as ConXRefs - simple)   | Shipment-Related Constituents       | No  | Yes | Yes |
| Text Entries                  | <a href="#">Text Entries</a> related to a Shipment record, such as Correspondence, Packing List, or Courier Requirements.   | Shipments /Text Entries             | Yes | No  | Yes |

# Shipment Conveyance data

Fields available for conveyances are used to instruct when objects are moved into crates and when crates are added to a conveyance.

When a **conveyance** is selected in the tree, the following fields are available in a Data Form.

| Conveyance Node Fields      | Description   | Context                                  | User Defined? | Authority Controlled? | On System Data Form? |
|-----------------------------|---|--|---------------|-----------------------|----------------------|
| Climate Controlled          | Indicates if the conveyance is climate controlled.                                    | Shipment Steps/Conveyances               | No            | No                    | Yes                  |
| <a href="#">Constituent</a> | Linked Constituent records for people or entities related to the conveyance.          | Shipment Steps/Step-Related Constituents | No            | Yes                   | Yes                  |
| Conveyance Dimensions       | The measurements of the conveyance. Height, Width, Depth, and Weight can be recorded. | Shipment Steps/Conveyances               | No            | No                    | No                   |
| Conveyance Number           | A unique number assigned to a conveyance.   | Shipment Steps/Conveyances               | No            | No                    | Yes                  |
| Conveyance Type             | The transportation type of a conveyance, such as Air, Land, or Sea.                   | Shipment Steps/Conveyances               | No            | Yes                   | Yes                  |
| Remarks                     | Instructions or remarks about a conveyance.   | Shipment Steps/Conveyances               | No            | No                    | Yes                  |

For security settings, see the [Shipping Module Security](#) page.

# Shipment Steps Data

The [Shipment Steps Alternate Hierarchy Tree](#) is used to record the multiple shipping steps that objects make through the shipping process, such as when a shipment is set to depart/arrive, when objects should be loaded into crates, and when crates should be loaded into conveyances.

Refer to [Shipment Steps](#) for instructions on using this feature.

When a **Step** is selected in the tree, the following fields are available in a [Data Form \(Data Entry View\)](#).

| Step Node Fields             | Description  | Context                                   | User Defined? | Authority Controlled? | On System Data Form? |
|------------------------------|--|---|---------------|-----------------------|----------------------|
| Shipping Method              | The method in which a shipment is transported for a step, such as Air Freight, Truck, or Hand Carried.   | Shipment Steps                            | No            | Yes                   | Yes                  |
| Carrier                      | Linked Constituent record for the carrier transporting a shipment for a step in a Shipment record. Refer to <a href="#">Linked Constituent References (ConXRefs)</a> .   | Shipment Steps                            | No            | Yes                   | Yes                  |
| Flight Number                | The flight number for when a shipment is transported by air for a step in a Shipment record.   | Shipment Steps                            | No            | No                    | Yes                  |
| Departure City               | The city of departure for a step in a Shipment record.   | Shipment Steps                            | No            | No                    | Yes                  |
| Departure Date               | The day in which a step in a Shipment record begins.   | Shipment Steps                            | No            | No                    | Yes                  |
| Departure Time               | The time of day in which a step in a Shipment record begins, recorded in hh:mm format.   | Shipment Steps                            | No            | No                    | Yes                  |
| Arrival City                 | The arrival city for a step in a Shipment record.  | Shipment Steps                            | No            | No                    | Yes                  |
| Arrival Date                 | The day in which a step in a Shipment record ends.   | Shipment Steps                            | No            | No                    | Yes                  |
| Arrival Time                 | The time of day in which a step in a Shipment record ends, recorded in hh:mm format.   | Shipment Steps                            | No            | No                    | Yes                  |
| Instructions                 | Instructions related to a step in a Shipment record.   | Shipment Steps                            | No            | No                    | Yes                  |
| Step-Related Constituents    | Linked Constituent records for people or entities related to a step in a Shipment record, such as Art Handler, Courier, or Contact. In TMS Composer the field is labeled as: ConXRefs- Simple. Refer to <a href="#">Linked Constituent References (ConXRefs)</a> . | Shipment Steps /Step-Related Constituents | No            | Yes                   | Yes                  |
| <a href="#">Text Entries</a> | Text Entries related to a step in a Shipment record.   | Shipment Steps /Text Entries              | Yes           | No                    | Yes                  |

For security settings, see **Shipment Steps** on the [Shipping Module Security](#) page.

# Linked Data (From Records Linked to Shipments)

In a Shipment record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Shipment Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Constituent and Media records are also available in the [Main Shipment Record](#) in the [Linked Constituent References \(ConXRef\)](#) and [Linked Media References \(MediaXRef\)](#) widgets. Select the top tree node to access them.

## Link-Related Fields

When a Shipment is linked to records in other modules, information is generated that pertains to the link.

The following fields pertain to the *link* between a Shipment record and a record from another module. These fields are not part of either the Shipment record or the linked record, and only exist when the records are linked.

- [Shipment-Object Data](#)
- [Shipment-Loan Data](#)
- [Shipment-Exhibition Data](#)
- [Linked-Constituent \(ConXRef\) Data](#)
- [Linked-Media \(MediaXRef\) Data](#)
- [Shipment-Crate Data](#)

# Shipment-Crate data

*Content will be provided for this page in a future release.*

# Shipment-Exhibition Data

In the [Shipment Hierarchy Tree](#), select the Exhibitions node to access related fields in a read-only [List View](#).

For security settings, see **Shipment Exhibition Fields** on the [Shipping Module Security](#) page.

*Additional Content will be provided to this page in a future release.*

# Shipment-Loan Data

In the [Shipment Hierarchy Tree](#), select the Loans node to access related fields in a read-only [List View](#).

For security settings, see **Shipment Loan Fields** on the [Shipping Module Security](#) page

*Additional Content will be provided to this page in a future release.*

# Shipment-Object Data

For security settings, see **Shipment Object Fields** on the [Shipping Module Security](#) page.

*Additional Content will be provided to this page in a future release.*

# Shipment Hierarchy Tree

The main **Shipment Hierarchy Tree** provides access to all [core Shipment data](#), including data that is linked from other modules.

The data that displays in the center panel is determined by the tree node that is selected. The main Shipment record is represented in the top node, with child nodes representing modules or types of Shipment data. Some child nodes have their own child nodes for individual records.

In addition to the main tree layout, there is an alternate hierarchy tree layout available: [Shipment Steps](#)

## Shipment Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Shipment Hierarchy Tree Layout

### Shipment (top node)

Objects

(Object Number + Artist/Maker + Object Name + Title + Object Display Date)

Loans

(Loan Number + Borrower/Lender)

Exhibitions

Media

# Alternate Hierarchy Tree (Shipment Steps)

Once objects have been linked to a Shipment record, steps can be created to record each stage of the shipping process, such as transporting a loaded crate on a truck to an airport, transporting a crate on a plane to its destination city, and transporting a crate on a truck to the destination address. See [Shipment Steps](#) for instructions on using this feature.

## Shipment Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [data form](#).

## Shipment Steps Hierarchy Tree Layout

### Shipment (top node)

#### Step 1

Conveyances

(Conveyance 1 + Conveyance Type)\*

Crates\*

(Container Number + Includes Child Crate(s))

Uncrated Objects

Unloaded Crates

(Container Number + Includes Child Crate(s))\*

Uncrated Objects

#### Step 2\*\*

Conveyances

(Conveyance 1 + Conveyance Type)\*

Crates\*

(Container Number + Includes Child Crate(s))

Uncrated Objects

Unloaded Crates

(Container Number + Includes Child Crate(s))\*

Uncrated Objects



By default, Step 1 is included in the hierarchy. Nodes for additional steps only appear when a new shipment step is added.\*\* Nodes marked with \* will only display if a conveyance or crate is added to the step.

# Add New Shipment Record

Shipments can be added several ways:

[Add a new record](#) from the toolbar.

[Link an new shipment](#) to a Loan record.

Regardless of the method used, there are fields required when adding new Shipment records.

## Fields Required When Adding New Shipment Records

| Field      | Description                                   | Notes   |
|------------|---|---|
| Department | A list of preconfigured Shipment Departments. | A description of this field is available in the list of <a href="#">main Shipment record fields</a> . |

After selecting **ADD** in the Add New Shipment window, the **Shipment Number** field will be automatically populated with a value that begins with the prefix *SH* followed by the year and a hyphen, and the next sequential number for the Shipment record created in the year. The Shipment Number may be updated to a custom value if needed. See [Main Shipment Record](#) for a full description of the Shipment Number field.

For security settings, see **Creating Shipment Records** on the [Shipping Module Security](#) page.

# Shipment Steps

Once objects have been linked to a Shipment record, steps can be created to record each stage of the shipping process, such as transporting a loaded crate on a truck to an airport, transporting a crate on a plane to its destination city, and transporting a crate on a truck to the destination address.

See [Shipment Steps Data](#) for the list of fields available for recording information about shipment steps.

## Creating a Step

1. With a Shipment record open, select the [Shipment Steps Alternate Hierarchy Tree](#).
2. Select **Step 1** in the tree.
3. Use the [fields](#) in the [Data Form \(Data Entry View\)](#) to record the shipping information as it relates to Step 1.



A first step is automatically generated when a Shipment record is created. To create and delete additional steps, select the **arrow** to the right of the top node in the tree, labeled with the Shipment Number + Shipment Type.

## Conveyances

A conveyance is a means of transport, such as a truck or airplane.

### Adding a Conveyance

Select the **arrow** to the left of the desired Step to expand the node and display a Packing Hierarchy.

The Packing Hierarchy is divided into three nodes:

- **Conveyances**
- **Unloaded Crates**
- **Uncrated Objects**

The objects linked to the Shipment record display in a [List View](#) in the Uncrated Objects folder.

1. Select the **Conveyances** node.
2. Select the **arrow** to the right of the node.
3. Select **Add New Shipment Conveyance**.
4. The new conveyance will display in the tree under the **Conveyances** node. Select the conveyance in the tree and use the [fields](#) in the [Data Form](#) to record information about the conveyance.

### Adding a Bill Number to a Conveyance

A bill number, such as the number for a waybill or bill of lading can be added to each conveyance.

1. Select a **conveyance** in the tree.
2. Select the arrow to the right of the conveyance and select **Manage Bill of Lading Number**.
3. A new window opens. Type the number in the Bill of Lading Number field.
4. Select **Save**.

### Deleting a Conveyance

1. Select a **Conveyance** in the tree.
2. Select the **arrow** to the right of the conveyance and select **Remove Conveyance**.
3. A prompt opens, asking if the conveyance should be removed. Select **Yes**.

Any containers/crates in the Conveyance now display under the **Unloaded Crates** node in the tree.



To edit the Bill of Lading Number, follow the steps above. Edit the number in the Manage Bill of Lading Number window and select **Save**.

## Containers/Crates

A container/crate is a case used for transporting or storing objects.

### Adding a Container/Crate

1. In the tree, under the desired Step, select the **Step node** or **Unloaded Crates** node.

2. Select the **arrow** to the right of the node and select **Add Crate to Shipment**.
3. Use the [Container/Crate Lookup](#) to search for a crate or [create a new one](#).
4. If lookup is selected, use the checkboxes next to the container(s)/crate(s) in the Suggestions grid to select the ones to add to the shipment.
5. Choose **Select**.
6. If a *new* container/crate record is created, enter the [required fields](#) and select **ADD**.
7. Once a container/crate has been selected or created, it displays in the tree under the **Unloaded Crates** node.



Refer to the [Crates module](#) section for information on creating records for containers and crates.

## Editing a Container/Crate

1. In the tree, select a container/crate.
2. Select the **arrow** to the right of the container/crate and choose **Navigate to Record**.
3. The Crate record opens in the [Crates module](#) and can be edited.

## Removing a Container/Crate from a Shipment Record

1. In the tree, select a container/crate.
2. Select the **arrow** to the right of the container/crate and choose **Remove Crate**.
3. A prompt opens asking if the container/crate should be removed from the record. Select **Yes**.

## Moving Objects/Components

Objects/Components can be moved into Crates, which can then be moved into a conveyance. Uncrated Objects can also be moved directly into a conveyance without first being moved into a crate.

### Moving Objects/Components into a Container/Crate or Directly into a Conveyance

1. In the tree, select the **Uncrated Objects** node under the desired Step.
2. On the right, the uncrated object(s)/component(s) display in a [List View](#). Use the checkboxes to select the object(s)/component(s) that should be moved.
3. Select (...) in the List View toolbar and choose **Move selected components**.
4. In the tree, an **action icon** will display to the right of each **crate**, as well as the **Uncrated Objects** node under each **Conveyance**.
5. Select the **action icon** next to the location to which the object(s)/component(s) should be moved and select **Move Here**.

### Removing Objects/Components from a Container/Crate

1. In the tree, select the **container/crate**. A List View of the object(s)/component(s) in the crate display on the right.
2. Use the checkboxes to select the objects/components to be removed from the container/crate.
3. Select (...) in the List View toolbar and choose **Move selected components**.
4. In the tree, an **action icon** will display to the right of each **crate**, as well as the **Uncrated Objects** node under the **Step**, and the **Uncrated Objects** node under each **Conveyance**.
5. Select the **action icon** next to the desired location and select **Move Here**.

### Removing Uncrated Objects/Components from a Conveyance

1. In the tree, select the **Uncrated Objects** node under a **Conveyance**. A List View of the uncrated object(s)/component(s) in the Conveyance displays on the right.
2. Use the checkboxes to select the objects/components to be removed from the Conveyance.
3. Select (...) in the List View toolbar and choose **Move selected components**.
4. In the tree, an **action icon** will display to the right of each **crate**, as well as the **Uncrated Objects** node under the **Step**, and the **Uncrated Objects** node under each **Conveyance**.
5. Select the **action icon** next to the desired location and select **Move Here**.



If the container/crate contained any objects, they will display under the **Uncrated Objects** node in the tree.

Container/crate records are only removed from Shipment records and not deleted.

## Moving Containers/Crates

Containers/Crates can be moved using the node option in the Packing Hierarchy (to move one crate at a time); or using the List View toolbar option (to move one or more crates at a time).

A container/crate can be moved to the following locations:

- another container/crate
- a Conveyance
- the Unloaded Crates node

### Option 1: Moving Containers/Crates using the Packing Hierarchy Node Option

1. Select a **Crate** in the tree.
2. Select the **arrow** to the right of the crate and choose **Move Crate**.
3. In the tree, an action **icon** will display to the right of each **crate, conveyance**, and the **Unloaded Crates** node under the Step.
4. Select the action **icon** next to the desired location and select **Move Here**.

### Option 2: Moving Containers/Crates using the List View Toolbar Option

1. Select the **Unloaded Crates** node under the desired Step, or the **Crates** node under a **Conveyance** to display a List View of the container(s)/crate(s) on the right.
2. Use the checkboxes to select the container(s)/crate(s) to be moved.
3. Select (...) in the List View toolbar and choose **Move Crate**.
4. In the tree, an **action icon** will display to the right of each **crate, conveyance**, and the **Unloaded Crates** node under the Step.
5. Select the **action icon** next to the desired location and select **Move Here**.

The Packing Hierarchy will update to display the selected container(s)/crate(s) under the location to which they have been moved.

For security settings, see **Shipment Step Information** and **Adding Crates, Crating Objects and Loading Crates into Conveyances** on the [Shipping Module Security](#) page.

# Container/Crate Lookup

To search for a container/crate record:

1. In the Container/Crate Lookup window, type search criteria in one or more fields (see field list below).
2. If inactive container/crate records should be included in the results, check the **Show Inactive** box.
3. Once search criteria is entered, select **Find**.
4. The search results will display in the Suggestions grid. Use the checkboxes to select the crates/containers to add to the Shipment record.
5. Choose **Select** below the grid.

The container(s)/crate(s) display in the [Shipment Steps Hierarchy tree](#) under the **Unloaded Crates** node.



To search for all container/crate records, select **FIND** without entering any search criteria in the lookup fields. All container/crate records display in the Suggestions grid.

## Container/Crate Lookup Fields

| Container/Crate Fields | Description  |
|------------------------|--|
| Number                 | A number assigned to a container/crate.  |
| Operator               | Choose "starts with" to search for a container/crate beginning with the value typed in the <i>Number</i> field.<br>Choose "contains" to search for a container/crate containing the value typed in the <i>Number</i> field.<br>Choose "equals" to search for an exact match with the value typed in the <i>Number</i> field. |
| Type                   | A type of container/crate, such as carton or metal case.   |
| Project                | A project related to a container/crate.  |
| Source                 | The source or maker of a container/crate.  |
| Contents               | The contents of a container/crate.   |
| Show Inactive          | Used to display inactive containers/crates in the search results.  |

## Adding a Container or Crate

To add a new container/crate record, select **Add New** in the Container/Crate Lookup window. Follow the steps to [add a new crate record](#).

For security settings, see [Viewing Container/Crate Lookup in the Shipping Module](#) on the [Shipping Module Security](#) page.

# Shipment Object Valuations

## Assigning a Valuation to Objects in a Shipment

1. In the [Shipment Hierarchy Tree](#), expand the **Objects node**.
2. Select a specific **Object node**.
3. In **Insured Value (Object)**, **select** a value from the list.
4. Check **Display Loan values only** in order to display only the Object values that were created in [Loan Object Valuations](#). If there are no Loan Object Valuations, this option cannot be selected.
5. Select the components that will have the valuation amount distributed evenly amongst them. Their **Value** will become enabled.
6. Enter a **Value** for each selected Component.
7. Select **Distribute the Value to Selected Components (wand icon)**. An Insurance Value will then be assigned to each Component in the Shipment.

The list of values can be sorted by clicking on any of the column headers.

The values in the list are created in [Object Valuations](#). Values from [Loan Object Valuations](#) will also display in the list if: the Object is linked to a Loan record, the Loan is linked to the Shipment, and the Loan Object is Included in the Shipment.

For security settings, see [Updating Object Component Insurance Values](#) on the [Shipping Module Security](#) page.

# Batch Update Shipment Records

Updating a group of records can be performed on the following Shipment record fields:

- [Attributes \(ThesXRefs\)](#)
- [Text Entries](#)

To update a group (batch) of Shipment records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Shipment Records** on the [Shipping Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Batch Update Objects Linked to the Shipment

The following fields are available for updating in a batch (group) of Objects linked to the current Shipment record:

- Remarks
- Shipment Status

To update the Object records linked to a Shipment record, follow the steps to [Batch Update Linked Records](#).

For security settings, see **Batch Updating Objects Linked to a Shipment** on the [Shipping Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Batch Update Object Components Linked to the Shipment

The following fields are available for updating in a batch (group) of Object *Components* linked to the current Shipment record:

- Remarks
- Shipment Status (Component)

To update the Object Component records linked to a Shipment record, follow the steps to [Batch Update Linked Records](#).

For security settings, see **Batch Updating Object Components Linked to a Shipment** on the [Shipping Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Batch Update Exhibitions Linked to the Shipment

The following fields are available for updating in a batch (group) of Exhibitions linked to the current Shipment record:

- Remarks

To update the Exhibition records linked to a Shipment record, follow the steps to [Batch Update Linked Records](#).

For security settings, see **Batch Updating Exhibitions Linked to a Shipment** on the [Shipping Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Batch Update Loans Linked to the Shipment

The following fields are available for updating in a batch (group) of Loans linked to the current Shipment record:

- Remarks
- Shipment Status

To update the Loan records linked to a Shipment record, follow the steps to [Batch Update Linked Records](#).

For security settings, see **Batch Updating Loans Linked to a Shipment** on the [Shipping Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Delete Shipment Records

The process to [delete a record](#) is the same as in other modules.

When attempting to delete a Shipment record, the [Shipment Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Shipment must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Shipment Records** on the [Shipping Module Security](#) page.

# Shipment Usage Report

When deleting a Shipment record, its usage will display in a Shipment Usage Report. Any usage of the Shipment record that prevents it from being deleted will display in **red**.

## Links to the following record(s) in other modules

Object record(s)

Media record(s)

Exhibition record(s)

Loan record(s)

## Usage in Other TMS Products:

If there is a valid license for other TMS Suite products, or [there was a previous license for TMS for Windows](#), the Usage report will list records from those products that are linked to the Exhibition.

### **TMS Conservation Studio**

- Project record(s)

### **TMS Media Studio**

- Project record(s)

# Edit/View Shipment Records

Select a Shipment record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Shipping module: [Open Package records](#) (from the Package panel or Manage Package Folders).

The method for viewing and editing Shipment records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Shipment Records** on the [Shipping Module Security](#) page.

# Link Shipment to Records in Other Modules

Shipment records may be [linked to records from other modules](#).

Data that pertains to a linked record is considered part of the Shipment Main data ([data linked to Shipment from other modules](#)).

In the Shipment record, linking to records in other modules is performed by selecting either the top node, or the node labeled with the module name in the [Shipment Hierarchy Tree](#) or the [Shipment Steps Alternate Hierarchy Tree](#).

## Link Records in Another Module to the Current Shipment Record

In a Shipment record, records from other modules may be linked to a Shipment using several different methods:

- [Link an existing record](#)
- [Add a new record to link](#)
- To link Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget (select the top tree node)
- To link Media records, use the [Linked Media References \(MediaXRefs\)](#) widget (select the top tree node)
- To link Object records, additional options are [Linking Objects using Package](#) or [Object Working List](#)

## Link Options Unique to Shipments

- To link the Objects in a linked Loan, refer to [Link Loan Objects to a Shipment](#)
- To link the Objects in a linked Exhibition, refer to [Link Exhibition Objects to a Shipment](#)
- To link Loan records and their related Exhibitions, refer to [Link Loans and Related Exhibitions to a Shipment](#)
- To link a Crate to a Shipment, add a Crate while recording [Shipment Steps](#)

## Unlink a Record

Follow the steps to [Unlink a record](#).

For **security settings**, see individual linked pages above.

# Link Loan Objects to a Shipment

In a **Shipment record**, Objects belonging to any linked Loans may be added to the Shipment.

By default, in a Shipment record, when a Loan is linked, the Objects in the Loan *will* be automatically linked to the Shipment.

If any of the linked Loan's Objects should not be included in the shipment, they can be removed under the Loans node in the [Shipment Hierarchy Tree](#).

In the Shipment Hierarchy Tree, under Shipments > Loans > individual Loan, there are 2 nodes:

- Included Components displays a list of all Object Components in the linked Loan that are also included in (linked to) the Shipment
- Excluded Components displays a list of all Object Components in the linked Loan that are *not* included in (linked to) the Shipment

## Add Loan Objects to a Linked Shipment Record

1. Open a Shipment record. In the Tree, expand the **Loans** node to display a list of linked Loans.
2. Select and expand the node for a specific Loan.
3. Select **Excluded Components** to display a list of all Objects in the linked Loan that are not included in (linked to) the Shipment.
4. In the [List View](#) on the right, select/check Loan Objects to add to the Shipment.
5. Select three dots (...) in the List View toolbar and choose **Included Components**.
6. Answer **Yes** to the prompt. The Loan Objects will be linked to the shipment and will display under the Included Components node in the tree.

## Remove Loan Objects From a Linked Shipment Record

1. Open a Shipment record. In the Tree, expand the **Loans** node to display a list of linked Loans.
2. Select and expand the node for a specific Loan.
3. Select **Included Components** to display a list of all Object Components in the linked Loan that are included in (linked to) the Shipment.
4. In the List View on the right, select/check Loan Objects to remove from the Shipment.
5. Select three dots (...) in the List View toolbar and choose **Exclude Components**.
6. Answer **Yes** to the prompt. The Loan Objects will be unlinked from the Shipment and will display under the **Excluded Components** node in the tree.

For security settings, see [Linking Loans to Shipment Records](#) and [Including/Excluding Components in a Shipment](#) on the [Shipping Module Security](#) page.

# Link Exhibition Objects to a Shipment

In a **Shipment record**, Objects belonging to any linked Exhibitions may be added to the Shipment.

In order to use this option, an Exhibition record must first be linked to the Shipment record. This can be done in one of two ways:

- Follow the steps to [Link an existing record](#)

OR

- To link an Exhibition while linking a Loan record, refer to [Link Loans and Related Exhibitions to Shipment](#)

After at least one Exhibition record is linked to the Shipment record, Objects from the linked Exhibition record(s) may be added to the Shipment.

## Add Exhibition Objects to a Linked Shipment Record

1. Open a Shipment record. In the [Shipment Hierarchy Tree](#), select the Objects node option to **Link Object using Exhibition**. The Link Object using Exhibition window opens.
2. Select the desired Exhibition from the drop-down list which is populated by all Exhibitions that are linked to the current Shipment record.
3. Use the checkboxes to select the Objects to include in the Shipment. The checkbox at the top of the list may be used to select or deselect all Objects.
4. Select **ADD**. The Objects will display under the Objects node in the tree.

## Remove Exhibition Objects from a Linked Shipment record

Follow the steps to [unlink a record](#).

For security settings, see **Linking Exhibitions to Shipment Records** and **Linking Objects to Shipment Records** on the [Shipping Module Security](#) page.

# Link Loans and Related Exhibitions to a Shipment

In a **Shipment record**, when linking a Loan to the Shipment, there is an option to link the Loan's related Exhibitions at the same time.

1. Follow the steps to [link an existing record](#).
2. If only one Loan was selected for linking and it has a linked Exhibition, answer **YES** to the prompt "Do you want to link the Loan's related Exhibitions?"
3. If multiple Loans were selected for linking and any of them have linked Exhibitions, a dialog will open instructing to select loans if their related Exhibitions should also be added to the Shipment.
  - a. Select/Check the **Loan(s)** for which their related Exhibitions should also be linked to the Shipment.
  - b. Select **OK**.

The selected Loan records and any Objects and Exhibitions linked to them will be linked to the Shipment. This is reflected in the Loans, Objects and Exhibitions nodes of the [Shipment Hierarchy Tree](#).

For security settings, see **Linking Loans to Shipment Records**, **Linking Objects to Shipment Records** and **Linking Exhibitions to Shipment Records** on the [Shipping Module Security](#) page.

# Navigate to Records Related to the Shipment

Navigation to records that are linked to the Exhibition can be performed 2 ways:

[Toolbar option for records related to Shipment](#)

[Opening records from a List View displaying linked records](#)

# Related Records (Toolbar) for Shipments

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Shipment record or the entire current record selection.

| Navigation Option   | Module      | Create link using   | View link other module                                      |
|---------------------|-------------|---|---|
| Related Exhibitions | Exhibitions | <a href="#">Shipment Hierarchy Tree</a> > Exhibitions node                        | <a href="#">Exhibitions Hierarchy Tree</a> > Shipments node |
| Related Loans       | Loans       | Shipment Hierarchy Tree > Loans node  | <a href="#">Loans Hierarchy Tree</a> > Shipments node       |
| Related Media       | Media       | Shipment Hierarchy Tree > Media node or <a href="#">Related MediaXrefs widget</a> | Not visible in Media module                                 |
| Related Objects     | Objects     | Shipment Hierarchy Tree > Objects node or Loans node                              | <a href="#">Objects Hierarchy Tree</a> > Shipments node     |

# Sites

The Sites module is used to record information about current and historical sites, such as archaeological sites, historic buildings, gardens, or parks.

A list of the fields available for viewing or editing in the Sites module is in [Site Data](#).

The [Sites Hierarchy Tree](#) provides a hierarchical view of a Site record, and has functionality for adding data and linking and associating other records.

# Site Data

Site records have categories of data directly related to the Site itself. The core Site data is divided into the main (or module-level) [context](#), and multiple sub-categories, or sub-contexts.

The different contexts of a Site record are accessed by selecting either a specific widget in a [Data Form \(Data Entry View\)](#) or a specific tree node.

## Site Contexts

| Context   | Node or Tree                  | Fields available in Data Form   |
|---|-------------------------------|---|
| <a href="#">Main Site Record</a>                  | Top node                      | Data in the main Site record and some sub-categories  |
| <a href="#">Site Geography</a>                    | Geography node                | Geography fields  |
| <a href="#">Linked records from other modules</a> | Node labeled with module name | Fields related to the link between the records; in some cases, the linked record itself may be edited |

In some Site contexts, on the Data Form, there are widgets that appear to represent data, but they are actually [Standard Feature Widgets](#) that perform an action ([Crystal Reports](#), [eMuseumLookup](#)). These widgets are not included on any fields lists since they are not part of any record.

# Main Site Record

The main Site record is accessed by selecting the top node of the [Sites Hierarchy Tree](#), which will then display the fields in a [Data Form \(Data Entry View\)](#).

Some of the fields available belong to sub-categories, or sub-contexts, but do not require the selection of a separate node or tree. See the **Context** column.

Authority Controlled fields require configuration of controlled values.

## Site Record Fields

| Field                             | Description  | Context                             | User Defined? | Authority Controlled?                       | On System Data Form? |
|-----------------------------------|--|-------------------------------------|---------------|---|----------------------|
| Active                            | Indicates if a Site record is currently active.  | Sites                               | No            | No  | Yes                  |
| <a href="#">Alternate Numbers</a> | An alternate number associated with a site, such as a previous Site Number, or the number for a Site in a separate database.   | Sites /Alternate Numbers            | No            | No  | Yes                  |
| <a href="#">Attributes</a>        | Thesaurus controlled terms linked to a Site record. Also known as ThesXRefs.   | Sites /Attributes                   | Yes           | Yes   | Yes                  |
| Condition                         | Information on the condition of a site.<br><div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> This field is independent of conservation functionality.</div>   | Sites                               | No            | No  | Yes                  |
| Department                        | The Site department to which a Site record is assigned. Site departments serve as the highest categorical level to which a Site record can belong, and control security. Example Site departments could be Internal, Excavation, or Private.   | Sites                               | No            | Yes   | Yes                  |
| Description                       | A narrative description of a site.   | Sites                               | No            | No  | Yes                  |
| Dimensions                        | May be used to record the dimensions of a site without using a controlled structure.   | Sites                               | No            | No  | Yes                  |
| <a href="#">Dimensions</a>        | Used to record dimensions of a site using a controlled structure.  | Sites /Dimension Item Element Xrefs | No            | No  | Yes                  |
| Environment                       | Information about the surrounding conditions of a site.  | Sites                               | No            | No  | Yes                  |
| <a href="#">Flex Fields</a>       | Flex Fields are "flexible" or user-created fields that are configured in the <a href="#">TMS Suite Application Configuration Utility</a> . All <b>ungrouped</b> flex fields for a record display together in a "container."<br><br><b>Grouped</b> Flex Fields are related and can include workflow and approval information. A Flex Field group displays in its own container. | Site Flex Field Xrefs               | Yes           | Depends on configuration of the Flex Field. | No                   |
| <a href="#">Geography Xrefs</a>   | Thesaurus controlled geography terms related to a site.  | Sites /Geography Xrefs              | No            | Yes   | Yes                  |
| <a href="#">Historical Dates</a>  | Dates related to a site, such as when it was founded, built, opened, or discovered.  | Site Dates                          | No            | No  | Yes                  |
| Historical Notes                  | Notes about the history of a site.   | Sites                               | No            | No  | Yes                  |
| Legal Notes                       | Legal notes about a site.  | Sites                               | No            | No  | Yes                  |
| Location Notes                    | Any notes about the location of a site.  | Sites                               | No            | No  | Yes                  |
| Public Information                | Controls whether a Site record is available to be used on an institution's website.  | Sites                               | No            | No  | Yes                  |
| Remarks                           | Any comments about a site.   | Sites                               | No            | No  | Yes                  |
| Research Activity                 | Any remarks about research activity related to a site.   | Sites                               | No            | No  | Yes                  |
| Researcher Comments               | Any remarks from researchers about a site.   | Sites                               | No            | No  | Yes                  |

|                           |   |                           |     |     |     |
|---------------------------|---|---------------------------|-----|-----|-----|
| Site Classification       | A classification for a site, such as Building, Archaeological Site, State Park, or Garden.  | Sites                     | No  | Yes | Yes |
| Site Geography            | Geographic locations entered for a site.  | Site Geography            | No  |     | Yes |
| Site Name                 | A formal or descriptive name of a site.   | Sites                     | No  | No  | Yes |
| Site Number               | An identifying number for a Site record. The (...) button will generate the next consecutive Site Number based on existing Sites in the database.<br><br>The <i>Sites.SiteNumber.Optional</i> setting in the <a href="#">TMS Suite Application Configuration Utility</a> determines if a Site Number is mandatory or optional for Site records. | Sites                     | No  |     | No  |
| Site Status               | A status of a site, such as Inactive or Seasonal.   | Sites                     | No  | Yes | Yes |
| Site Type                 | A type of site. May be used to further contextualize the assigned Site department.  | Sites                     | No  | Yes | Yes |
| Site-Related Constituents | Linked Constituent records for people or entities related to a site, such as a Landscaper, Archaeologist, or Researcher. In TMS Composer this field is labeled as ConXRefs-Simple.  | Site-Related Constituents | No  | Yes | Yes |
| Status Flags              | Short text alerts.  | Sites/Status Flags        | No  | Yes | Yes |
| Text Entries              | Fields of text or HTML content.   | Sites/Text Entries        | Yes | No  | Yes |

# Site Geography

**Site** Geography fields are in the **Site Geography context**, or sub-category.

Selecting the **Geography node** in the [Sites Hierarchy Tree](#) displays a list of all Geography Types assigned to a Site. Selecting an individual node labeled with a Geography Type will display its [Geography Fields](#) in a [Data Form \(Data Entry View\)](#).

For security settings, see **Site Geography** on the [Sites Module Security](#) page.

# Linked Data (From Records Linked to Sites)

In a Site record, fields from a record linked from another module are accessible by selecting the appropriate node in the [Sites Hierarchy Tree](#).

## Linked Records

To view a **summary** of linked records in a read-only [List View](#), select the tree node labeled with the **module name**.

To view details for an **individual** linked record in a [Data Form \(Data Entry View\)](#), select the tree node labeled with the **record identifier**. Nodes for individual records are not available for all modules.

Some fields in linked Constituent and Media records are also available in the [Main Site Record](#) in the [Linked Constituent References \(ConXRef\)](#) and [Linked Media References \(MediaXRef\)](#) widgets. Select the top tree node to access them.

## Link-Related Fields

When a Site is linked to records in other modules, information is generated that pertains to the link.

The following fields pertain to the *link* between a Site record and a record from another module. These fields are not part of either the Site record or the linked record, and only exist when the records are linked.

- [Linked-Bibliography Data](#)
- [Linked-Event Data\\*](#)
- [Linked-Constituent \(ConXRef\) Data](#)
- [Linked-Media \(MediaXRef\) Data](#)
- [Site-Object Data](#)

\* The link-related data is read only in this module. It must be accessed in the linked record in the other module.

# Site-Object Link Fields

Select the **Objects** tree node. A list of all Object records linked to the Site will display in a read-only [List View](#).

Select a node labeled with the **Object Number and Title**. The fields listed below will display in a [Data Form \(Data Entry View\)](#). Changes to these fields will *not* be reflected in the Object record.

## Site-Object Link Fields

| Field              | Description   |
|--------------------|---|
| Remarks            | Remarks regarding the Site that are specific to the Object  |
| Sub-Site 1         | Subsite information that is specific to the Object (a room of an historic house, a level of an excavation, etc.). |
| Sub-Site 2         | Subsite information that is specific to the Object  |
| Sub-Site 3         | Subsite information that is specific to the Object  |
| Site record fields | Fields from the Site record itself will be also be accessible ( <a href="#">Main Site Record</a> )                |

For security settings, see **Site-Object Link Fields** on the [Sites Module Security](#) page.

# Sites Hierarchy Tree

The **Sites Hierarchy Tree** provides access to all [core Site data](#), including data that is linked from other modules.

The data that displays in the center panel is determined by the tree node that is selected. The main Site record is represented in the top node, with child nodes representing modules or types of Site data. Some child nodes have their own child nodes for individual records.

## Site Hierarchy Panel Options

- **Share Link** allows a user to copy the URL for the current record. The person with whom the link is shared will be required to login to TMS Collections, and the data displayed will reflect the user's security permissions.
- **Refresh** updates the data displayed in the tree after changes are made on a [Data Form \(Data Entry View\)](#).

## Sites Hierarchy Tree Layout

### Site (top node)

Geography

Geography Type

Objects

(Object Number + Artist/Maker + Object Name + Title + Object Display Date)

Bibliography\*

(Heading + Title)

Associated Sites\* (if there was a previous license for TMS for Windows)

Events\*

Media

(Rendition Number + Media Type + File Name)



Nodes marked with \* will only display if a link or association exists with the current Site record.

# Add New Site Record

To create a new Site record, follow the steps to [add a new record](#) from the toolbar.

## Fields Required When Adding New Site Records

| Field       | Description   | Notes   |
|-------------|---|---|
| Department  | A list of Site Departments  | A description of this field is available in the list of <a href="#">main Site record fields</a> .   |
| Site Name   | A name of a Site  | A description of this field is available in the list of <a href="#">main Site record fields</a> .   |
| Site Number | An identifying number for a Site.<br>The <i>Sites.SiteNumber.Optional</i> setting in the <a href="#">TMS Suite Application Configuration Utility</a> determines if a Site Number is mandatory or optional for Site records. | Type the new Site Number in the field. The (...) button may be used to generate a sequential number that will append to the end of the text string typed. How Site Numbers are recorded depends on an institution's numbering convention. |

For security settings, see **Creating Site Records** on the [Sites Module Security](#) page.

# Batch Update Site Records

Updating a group of records can be performed on the following Site record fields:

- [Attributes \(ThesXRefs\)](#)
- [Flex Field](#)
- [Flex Field Group](#)
- [Geography Xrefs \(ThesXRefs\)](#)
- [Status Flags](#)
- [Text Entries](#)

To update a group (batch) of Site records, refer to [Batch Update the Current Record Selection](#).

For security settings, see **Batch Updating Site Records** on the [Sites Module Security](#) page and **Batch Updating Records** on the [Special Functions Security](#) page.

# Delete Site Records

The process to [delete a record](#) is the same as in other modules.

When attempting to delete a Site record, the [Site Usage Report](#) displays.

If a deletion is blocked by any usages listed in the report, the record linked to the Site must be modified or deleted in order to perform the deletion.

For security settings, see **Deleting Site Records** on the [Sites Module Security](#) page.

# Site Usage Report

When deleting a Site record, its usage will display in an Site Usage Report. Any usage of the Site record that prevents it from being deleted will display in red.

## Links to the following record(s) in other modules

Constituent record(s)

Object record(s)

Bibliography record(s)

Media record(s)

Event record(s)

## Usage in Other TMS Products:

If there is a valid license for other TMS Suite products, or there was a previous license for **TMS for Windows**, the Usage report will list records from those products that are linked to the Site.

### **TMS Conservation Studio**

- [Project record\(s\)](#)
- [Conservation Report records](#)

### **TMS Media Studio**

- [Project record\(s\)](#)

### **TMS for Windows**

- [Parent Site records](#)
- [Child Site records](#)

# Edit/View Site Records

Select a Site record (or group of records) for viewing or editing by using one of the the following methods:

From any module: [Search for a record](#)

From the Sites module: [Open Package records](#) (from the Package panel or Manage Package Folders).

The method for viewing and editing Site records is the same in all modules. Refer to [Edit/View a record](#).

For security settings, see **Editing/Viewing Site Records** on the [Sites Module Security](#) page.

# Link Site to Records in Other Modules

Site records may be [linked to records in other modules](#).

Data that pertains to the link between the Site and the other record is considered part of the Site Main data ([data linked to Site from other modules](#)).

In the Site record, linking to records in other modules is performed by selecting either the top node, or the node labeled with the module name in the [Sites Hierarchy Tree](#).

## Link Records in Another Module to the Current Site Record

In a Site record, records from other modules may be linked to the Site using several different methods:

- [Link an existing record](#)
- [Add a new record to link](#)
- To link Constituent records, use the [Linked Constituent References \(ConXRefs\)](#) widget (select the top tree node)
- To link Media records, use the [Linked Media References \(MediaXRefs\)](#) widget (select the top tree node)

## Unlink a Record

Follow the steps to [Unlink a record](#).

For security settings, see [Linking Bibliographies to Site Records](#), [Linking Events to Site Records](#), and [Linking Objects to Site Records](#) on the [Sites Module Security](#) page.

# Navigate to Records Related to the Site

Navigation to records that are linked to the Site record can be performed 2 ways:

[Toolbar option for records related to Bibliographies](#)

[Opening records from a List View displaying linked records](#)

# Related Records (Toolbar) for Sites

The Related records [toolbar](#) option provides the ability to navigate to records that are linked to the current Site record or the entire current record selection.

| Navigation Option         | Module       | Create link using  | View link other module  |
|---------------------------|--------------|--|---|
| Related Bibliography      | Bibliography | <a href="#">Sites Hierarchy Tree</a> > Top node or Bibliography node           | <a href="#">Bibliography Hierarchy Tree</a> > Sites node              |
| Related Events            | Events       | Sites Hierarchy Tree > Top node or Events node                                 | <a href="#">Events Hierarchy Tree</a> > Sites node                    |
| Related Media             | Media        | Sites Hierarchy Tree > Media node or <a href="#">Related MediaXrefs widget</a> | Not visible in Media module.  |
| Related Objects           | Objects      | Sites Hierarchy Tree > Top node or Objects node                                | <a href="#">Objects Hierarchy Tree</a> > Sites node                   |
| Site-Related Constituents | Constituents | <a href="#">Site-Related Constituents widget</a>                               | <a href="#">Constituents Hierarchy Tree</a> > Related Records > Sites |

# Packages

The **Packages** feature is a list management tool that organizes lists of records within the same module. Packages can be used for different purposes such as creating reports and linking records between modules. They can be used to facilitate workflows relating to installation and exhibition planning, events, publications, taking inventory, etc. Additionally, packages are often used to group objects on a public web site through the eMuseum application.

## How to use Packages in TMS Collections

### Package Panel

Packages and their records display in the [Package Panel](#) in the right-side panel of a page. It is there that the list of records in a package (the [Package List](#)) and Package details are maintained. It is accessed by selecting the **Packages** tab in the right-side panel.

### Manage Package Folders

All Packages are organized into **Package Folders**. [Manage Package Folders](#) is where the Folders are maintained (created, deleted, moved, copied, etc.).

Additionally, from within a Folder, [Packages](#) or [Package records](#) may be opened.

## Opening a Package vs. Opening Package Records

When a **Package** is opened, a *list* is opened: the list of the records belonging to the Package will open and display in the [Package List](#) in the [Package Panel](#), replacing the currently open Package (if there is one). The current selection of records is not affected.

When **Package records** are opened, *records* are opened: the records belonging to the Package will open and display in [Data Entry display mode](#), replacing the currently selected set of records. The currently open Package in the Package Panel is not affected.

# Package Panel

Package content and details display in a panel on the right side of a page in any view mode, in any module.

## Opening the Package Panel

To expand or collapse the Package Panel, in any display mode, click the Package tab in the [right-side panel toolbar](#). The panel will expand. It will open to the last Package that was open, unless it's been deleted. The panel will be empty until a Package is opened or created in the current module. The panel size can be adjusted by sliding the bar separating the Package Panel and the open module record to the left or right.

The Package Panel has the following features:

- Maintain and Package details (Notes, Lock/Unlock)
- Search for a different Package
- View Package contents (records) in an alternate sort order
- Add records to the Package
- Remove records from the Package

The **collapse arrow** will collapse the Package panel, but the Package that is open at that time will remain open.

Packages are module-specific: only Object Packages can be accessed and maintained in the Objects module, etc. A Package remains open even if the module is changed: when returning to Object records from another module, the package that was last open in Objects will still be open.

[A package remains open in the panel even after a session is ended.](#)

The Package panel contains the [Package List](#) and several action buttons: search for a package, edit package details, and view package contents. Each option opens a pop-up with its own toolbar as shown below.

## Package Panel Action Buttons

| Button                | Icon             | Function                                  | Opens page                              |
|-----------------------|------------------|---|---|
| Search                | Magnifying glass | <a href="#">Search for a Package</a>      | <a href="#">Package Search</a> pop-up   |
| Edit                  | (Edit icon)      | <a href="#">Edit Package Details</a>      | <a href="#">Package Edit</a> pop-up     |
| View package contents | ...              | More options for viewing Package contents | <a href="#">Package Contents</a> pop-up |

# Package List

The **Package List** displays all of the items in the current Package.

This is *not* a list of currently *open records* (the current record selection) - it is a list of the records in the *currently open Package*. For a list of the currently *open records*, select the [Record Set Tab](#) in the Record Hierarchy Tree or select [List display mode](#).

There are 2 fields displayed in the list:

- Primary Thumbnail Image
- Item Info (the record identifier)

The Package List is maintained using action buttons in its toolbar.

## Package List Toolbar

| Toolbar Button     | Icon  | Button Options   | Documentation Link                            |
|--------------------|-------|--|---|
| Add record(s)      | +     | Add current record to the package  | <a href="#">Add Records to a Package</a>      |
|                    | +     | Add all records in the current selection to the package                                      | <a href="#">Add Records to a Package</a>      |
|                    | +     | Add records that were selected in the Object Working List to the package                     | <a href="#">Add Records to a Package</a>      |
|                    | +     | Add all records from the Object Working List to the package                                  | <a href="#">Add Records to a Package</a>      |
| Delete record(s)   | X     | Delete currently selected record from the package  | <a href="#">Remove Records from a Package</a> |
|                    | X     | Delete all records from the package  | <a href="#">Remove Records from a Package</a> |
| Search for records | Open  | Opens all or just selected records in the package in <a href="#">Data Entry display mode</a> | <a href="#">Open Package Records</a>          |
| Edit contents      | (...) | Allows modification of Package display settings  | <a href="#">Package Contents Display</a>      |

# Add Records to a Package

There are several ways to add records to packages.

The Package must be opened ([Open a Package](#), [Search for a Package](#)) and records must be opened ([Search for Records](#)).

## Add Records from the Current Record Selection

1. Open at least one record ([Search for Records](#)).
2. In the [Package List](#) toolbar, select Add .
3. To add only the current record to the Package, select **Add current record**. To add all records in the current record selection, select **Add all records in the Record Set**. After selecting an option, the newly added records will be visible at the end of the Package List.

## Add Records from the Object Working List (Available in Objects Module Only)

1. Select the **Object Working List** tab.
2. To add only selected records from the list to a package, **select/check the record** in the Object Working List. If all records will be added to the Package, then no selection is necessary.
3. Return to the Package by selecting the **Packages** tab.
4. In the [Package List](#) toolbar, select Add .
5. To add the selected records in the Object Working List, select **Add selected records in the Working List**. To add all records from the Object Working List, select **Add all records in the Working List**. After selecting an option, the newly added Object records will be visible at the end of the Package List.

## Add Records from the Media Working List (Available in Media Module Only)

1. Select **Media Working List** in the toolbar. The list will open at the bottom of the page.
2. To add only selected records from the list to a package, **select/check the record** in the Media Working List. If all records will be added to the Package, then no selection is necessary.
3. Return to the Package by selecting the **Packages** tab.
4. In the [Package List](#) toolbar, select Add .
5. To add the selected records in the Object Working List, select **Add selected records in the Working List**. To add all records from the Object Working List, select **Add all records in the Working List**. After selecting an option, the newly added Media records will be visible at the end of the Package List.

# Creating New Packages

From any module, packages are created in 2 ways: from the toolbar, or in Manage Package Folders.

This cannot be performed from the Dashboard. At least one record must be selected from a module.

## Add a New Record from the Toolbar

1. In the Toolbar, select **Add + > Add New Record > Package**. The Package - Create window will open.
2. Enter values for the required fields: Name (auto-populated but editable), Notes, Folder Type, and Folder Name.
3. Select **SAVE**. The new Package will open in the Package Panel.

## Add a Package in Manage Package Folders

1. From the Login dropdown, select **Manage Package Folders**.
2. In the Folder tree on the left, select a Folder Type. A list of Package Folders will display in a grid on the right.
3. Under the Folder Type in the tree, select a Package Folder. Any Packages it contains will display in grid on the right.
4. Select **Add +** in the grid toolbar. The new Package will be added to the list of packages. The name will be auto-generated, but is editable and can be changed.

# Deleting and Restoring Packages

## Deleting a Package

A package can be deleted in two ways:

- In the Package panel, select the **Edit** icon to open the Package - Edit window. At the bottom right of the window, select **Delete** (trash). There will be a confirmation message to delete the package.
- In Manage Package Folders, select the folder where the package is located. In the list on the right, select/check the package to delete and select **Delete** (trash). There will *not* be a confirmation message to delete the package, but the package will be moved to the Recycle Bin and restored if needed.

## Restoring a Package

Regardless of the method used to delete a Package, when it is deleted, it will be moved to the Recycle Bin.

From the Recycle Bin, a deleted package can be restored to its original folder. This can only be done by the package Owner.

In Manage Package Folders, select the Recycle Bin folder. In the list on the right, select/check the packages to restore, and select **Recycle**. The folders will be removed from the Recycle Bin and moved to their original folder.

# Edit Package Details

In the Package panel, select the **Edit** icon. The Package - Edit pop-up will open.

The package Name, Notes, and Lock status can be modified and saved (select **Save**).

The folder and folder type are read-only; in order to modify these fields, the package must be moved in [Manage Package Folders](#).

| Button/Icon |          |   |
|-------------|----------|---|
| Name        | Text box | Modify the Package Name   |
| Notes       | Text box | Add Notes to the package  |
| Lock        | Checkbox | Checking/unchecking alternately locks/unlocks the package from editing by other users |

# Open a Package

Packages may be opened two ways:

[Search for a Package](#) or [Open Package From a Folder](#)

# Open Package Records

Package records may be opened from the [Package Panel](#) or from [Manage Package Folders](#).

## Open Records from the Package Panel

1. [Search for a Package](#).
2. In the search results, select the **Package** to open.
3. Select **Open Package**. The Package will open in the Package panel.
4. In the [Package List](#) toolbar, select **Search for Records in Package** (Open), or select **Contents (...)**, and in the Package Contents pop-up, select **Menu** (3 lines).

## Open Records from a Package Folder

1. In the Login dropdown, select [Manage Package Folders](#).
2. In the Folder tree on the left, select a Folder Type.
3. Expand the Folder Type and select a Folder. All Packages in the Folder will display in a grid on the right.
4. In the Packages grid, select the Package.
5. Select **Open Package** (eye) - not Search (magnifying glass).

The records open [Data Entry display mode](#) and replace the current [record selection](#). The Package that is currently open in the [Package Panel](#) will remain unchanged.

# Remove Records from a Package

1. The Package must be opened ([Open a Package](#), [Search for a Package](#)).
2. To remove all records from the package, select **Delete**  in the [Package List](#) toolbar, and choose **Remove all Records from the Package**.
3. To remove a selection of records, select the records in the list. Select **Delete**  and choose **Remove selected Records from the Package**.
4. Answer **YES** to the prompt. The record(s) will be removed from the package.

# Search for a Package

1. In the Package Panel, select **Search** (magnifying glass). The Package - Search pop-up will open.
2. Enter the **search criteria**. Refer to the chart below for search options.
3. Select **FIND**. A list of Packages matching the search criteria will display in a grid.
4. Select a Package in the grid.
5. To open the *Package*, select **Open Package**. It will open in the Package Panel, replacing the currently open Package (if there is one).
6. To open the *Package records*, select **Open Records**. The records will open in [Data Entry display mode](#), replacing the current record selection.

## Package Search Criteria

| Option                      | Description   |
|-----------------------------|---|
| Name                        | If left empty or "*" is specified; otherwise, the results are filtered by the Name provided.                              |
| Owner                       | If specified, filters the results by the selected user. All users that own existing packages are available for selection. |
| Folder Name                 | If specified, filters the results by the selected folder  |
| Folder Type                 | If specified, filters the results by the selected folder type   |
| Last Modified Date - before | TBD   |
| Last Modified Date - after  | TBD   |

Although not explicitly a search, a Packages may also be opened from a folder in [Manage Package Folders](#).



In searches on the **Package Name**, unless the exact name of the Package is entered, an asterisk must be both before and after the entered text. This is different than some other searches in the TMS Suite Web Applications.

In the options **Owner**, **Folder Name**, **Folder Type**, **Last Modified Date (before)**, and **Last Modified Date (after)**, *(not specified)* means the search results will include all Packages that the user has the right to access.

In **Owner**, most Users can search only for (not specified) or for Packages "owned" (created) by themselves (even though Packages owned by others may be included in search results when (not specified) is selected). For administrative reasons, System Administrator Users can search for Packages owned by any User, so they will see many values in the Owner drop-down.

# Change Package Owner

This is a new feature in 9.93. It is available in the login dropdown option "Change Package Owner". Re AVANTI-27005, AVANTI-27922.

A system administrator may transfer the ownership of Packages from one user to another.

1. In the [Login dropdown](#), select **Change Package Owner**. The *Change Package Owner* pop-up opens.
2. From the *Package Owners* dropdown select the user who will have ownership of one or more of their packages transferred to another user. Users with active accounts are labeled (Active) and those without active accounts are labeled (Inactive).
3. From the *Module* dropdown, select the module from which the user's Packages should display.
4. All of the selected user's Packages from the selected module display in a list.
5. From the *New Owner* dropdown, select the user to whom ownership will be transferred.
6. To change ownership of all of the packages, select **Change Owner For All**.
7. Or, if only certain packages should have their owner changed, select the desired packages and choose **Change Owner For Selected**.
8. The package(s) will be moved to the new owner's folder, which displays in the *Change Package Owner* pop-up.

For security settings, see **Changing Package Owner** on the [Special Functions Security](#) page.

# Package Folders

Folders are used to organize Packages. All packages are located inside folders.

The **Manage Package Folders** feature provides a list of folders categorized by type and the packages that they contain.

Folders are managed from this feature: they can be added, deleted, copied, and moved.

Packages are also managed from this feature: they can be added, deleted, copied, moved, opened, or executed (its records are opened in [Data Entry display mode](#)). This is detailed in [Package Management from its folder](#).

In the left panel, a folder hierarchy tree lists all folders and sub-folders for the current module organized by Folder Type. When a folder is selected, the packages in that folder will display in the table on the right.

## Folder Types

There are 7 package folder types: Personal, Favorites (shortcuts), Public, Shared, Web Access, Move Assistant, and Recycle Bin.

Public, Shared, Web Access, and Move Assistant folder types require a sub-folder to store packages.

### Personal

The Personal folder belongs to the user. Its packages cannot be accessed by any other user. The Personal folder cannot be deleted.

### Favorites

The Favorites folder contains shortcuts to packages that the user marked as Favorite (heart-shaped icon in the Package grid toolbar).

### Public

Public folders and their packages are available for viewing and editing by any user. However, only the owner or admin can delete a public package or modify its details.

### Shared

Shared folders and their packages are accessible to the owner or admin, but can only be accessed by other users if they have been granted permission in the Folder Security feature.

### Web Access

Requires security settings.

### Move Assistant

Requires security settings.

### Recycle Bin

The recycle bin contains packages that have been deleted. The packages can be restored to their original location by [restoring a package](#).

## Folder Management

In the Manage Package Folders pop-up, the tree on the left side panel lists all folder types: Personal, Favorites, Public, Shared, Web Access, Move Assistant, and Recycle. The Public and Shared folder types can be expanded to show the sub-folders that they contain.

### Add a new folder

1. In the tree in the left panel, select a Folder Type: Personal, Shared, Public, Web Access, or Move Assistant. Folders cannot be added to Favorites or the Recycle Bin. Any existing folders of that type will display in the folder list on the right.
2. Select **Add**  in the toolbar above the folder list. The new folder will be added to the folder list. Its name will be auto-generated, but can be changed.

### Delete a folder

1. Select the Folder Type. The list of folders of this type will display in the folder list on the right.
2. Select the folder to be deleted.

3. Select **Delete** (trash) icon in the toolbar above the list. If the folder contains any packages, there will be a warning message.
4. If **yes** is selected to continue deletion, the folder will be deleted and removed from the folder list.

## Set Folder Security

Shared, Web Access, and Move Assistant folders require security settings. Otherwise, the folder and its packages will only be accessible to the owner or sysadmin.

### Set Security on a Folder

1. In Manage Package Folders, select the folder type in the tree on the left.
2. Select **zoom** next to a folder to open the Folder Security page.
3. Authorization can be assigned to both individual users or the [Security Group](#) to which they were assigned in [WebConfiguration](#).
4. Select **Users** or **Security Group** to change the categorization of users.
5. Based on the filtering, the User (or Security Group) can be added/removed from folder access by selecting the > or < arrows.
6. The entire list of Users (or Security Groups) can be added/removed from folder access by selecting the >> or << arrows.

# Package Management (Manage Package Folders)

Packages are managed in the folder in which they are located. They can be added, deleted, copied, moved, marked as Favorite, or restored after deletion. Additionally, a package can be opened and loaded in the Packages panel, or have its records opened for data entry (executed), replacing the current selection.

Package content – records or package details – cannot be viewed or modified from a folder. A package must be opened in the [Package panel](#) in order to access its contents.

## Package Folder Toolbar in Manage Package Folders

| Icon  | Description  |
|---|--|
| Magnifying glass  | Opens records in a package in Data Entry display mode  |
| Eye   | Opens package in the Package panel   |
| Star  | Add package to the "Favorites" folder  |
| Scissors  | Cut package in order to paste (move) into another folder   |
| Copy  | Copy package in order to paste (copy) into another folder  |
| Trash   | Delete package   |
| Recycle   | Restore a deleted package to its previous location. This button is only available when the Recycle Bin is selected |
| Paste   | Will move or copy a package to the selected folder (depending on whether the package had been cut or copied)       |
| Add  | Add a new package to the current folder  |
| Paste (shortcut)  | Will add a shortcut to the current folder to a package that was previously copied                                  |

## Add a package to Folder

1. Select the folder in the tree on the left where the new package should be located. All existing packages in the folder will display in the list on the right.
2. Select **Add** . The new package will be added to the end of the current list of packages. Its name will be auto-generated, but is editable.

## Delete a Package from Folder

1. Select the folder in the tree on the left where the package should be deleted from.
2. Select the package(s) to be deleted. If all packages in the folder are being deleted, select the checkbox column header.
3. Select **Delete**. The package(s) will be deleted and be removed from the current list of packages. All deleted packages are moved to the Recycle Bin.

## Restore a Deleted Package

Packages that have been deleted can be restored to their original folder.

1. Select the Recycle Bin folder from the tree on the left. Packages in the folder will display on the right.
2. Select the package(s) to restore. If all packages in the folder are being restored, select the checkbox column header.
3. Select **Recycle**. The package(s) will be removed from the Recycle Bin folder and moved back to the original location(s).

## Copy Package

1. Select the folder in the tree on the left where the package should be copied from.
2. Select the package(s) to be copied. If all packages in the folder are being copied, select the checkbox column header.
3. Select **Copy**.
4. Select the folder in the tree to which the package(s) should be copied.
5. Select **Paste**. The package(s) will be copied and be added to the end of the current list of packages.

## Move a Package to Another Folder

1. Select the folder in the tree on the left where the package should be moved from.
2. Select the package(s) to be moved. If all packages in the folder are being moved, select the checkbox column header.
3. Select **Cut** (scissors).
4. Select the folder in the tree to which the package(s) should be moved.
5. Select **Paste**. The package(s) will be moved to the new folder and be added to the end of the list of its packages

## Mark Package as Favorite (Create Shortcuts)

1. Select the folder in the tree on the left where the package is located.
2. Select the package(s) for which a shortcut is being created. If all packages in the folder are being copied, select the checkbox column header.
3. Select **Favorites** (heart). A shortcut to the package will be created in the Favorites folder.
4. Select the Favorites folder. The package is now listed in that folder, but it will have a shortcut label indicating that the package wasn't moved or copied, but points to the package in its actual location.

# Open Package from a Folder

Packages can be opened from the folder in which they are located.

1. Select the folder in the tree on the left where the package is located. The packages in that folder will display on the right.
2. Select the package to open.
3. Select **Open Package** (eye). The Manage Package Folders pop-up will close. The package will open in the package right side panel. The package records will *not* open or replace the current record set.

# Open Package Records from a Folder

## Open Package Records (Execute) from a Folder

**Selecting OPEN PACKAGE will open the Package in the Package Panel. It will not open records or replace the current record set.**

1. Select the folder in the tree on the left where the package is located. The packages in that folder will display on the right.
2. Select the package to open.
3. Select **Search**. The Manage Package Folders pop-up will close. The records in the package will open in Data Entry display mode. The package right side panel will be unchanged and contain the package that was previously loaded (which may be different than the one whose records were just opened).

# Package Contents Display

There are several actions that can be performed on the contents of a Package (the items in the Package List).

1. In the Package panel, select (...) in the Package List toolbar. The *Package Contents* pop-up will open, with the records in the Package displayed in a List View.
2. As with List display mode and other [List Views](#) in TMS Collections, the records in the List View may be re-sorted. Select a column to sort the rows in order of that field.

| Button/widget           | Description  |
|-------------------------|--|
| List View dropdown list | Select a different preconfigured list view to change the fields displayed.   |
| Refresh                 | Returns the list to its original sort order.   |
| Search for records      | Open all/selected list view records in <a href="#">Data Entry display mode</a> (this will replace the current record selection). |
| Menu (3 lines)          | Saves the sort order as a <a href="#">preference</a> .   |

# Working Lists (Objects and Media)

In TMS Collections, the Working Lists are simple lists of records. They differ from Packages in their uses and available functionality.

If the lists are become lengthy, adding the records to a new Package may be more efficient.

[Object Working List](#)

[Media Working List](#)

# Object Working List

The Object Working List is accessible only in the Objects module. Refer to [Object Working List \(Objects Module\)](#).

In some modules, Object records in the Object Working List may be linked to the current record. The option would be in the Objects node of the Record Hierarchy Tree. Refer to a specific module's options for linking records.

# Media Working List

The **Media Working List** is a user-specific list of Media records that can be used for various purposes. It is often used to group records that may be difficult to obtain in a query.

It is not a [Package](#) and does not have the same functionality. It is accessible in all modules.

Each user may create one Media Working List, which will be accessible to only that user.

## Open the List

- Select **Media Working List** in the [Product toolbar](#). The list will display in a collapsible panel at the bottom pane of the page. It is empty by default until records are added.

## Close (Collapse) the List

- Select the collapse arrows above the list, select **Media Working List** in the [Product toolbar](#). The list will remain populated and not lose any items – and it will only be collapsed.
- The list automatically collapses when records from a different module are loaded, or when returning to the Dashboard.

## Media Working List Options

- **Select All:** selects all the records in the Media Working List (checks the checkboxes).
- **Deselect All:** deselects all records (unchecks all checked checkboxes).
- [Edit a Media record](#)
- Download a single file
- [Zoom into an image](#)
- [Compare images](#)
- Access the [Annotation feature](#)

## Media Working List Toolbar Options

Individual Media records are selected/checked in the thumbnail container in the list.

| Option   | Description   | Notes  |
|--|---|--|
| Up (arrow)   | Moves the selected record upward (toward the start) in the list                           | a record must be selected for this option to be enabled  |
| Down (arrow)   | Moves the selected record downward (toward the end) in the list                           | a record must be selected for this option to be enabled  |
| Cut (scissors)   | For reordering: removes the selected record from the list to be pasted elsewhere          | the selected record remains in place until pasted elsewhere in the list  |
| Paste  | For reordering: places the selected record to the current position in the list            |  |
| Open   | Opens the selected Media records in the list in <a href="#">Data Entry display mode</a> . |  |
| Add     | Create new Media record or locate an existing one and add it to the list.                 | Opens the same sub-menu as <a href="#">linking Media records in the MediaXRefs widget</a> . However, no record will be linked. The new or existing Media record is added to the end of the list. |
| All (circle)   | Adds the entire current record selection to the list                                      | The entire list is replaced by the current selection; previous contents will be deleted  |
| Remove  | Removes the selected records from the list  | It is good practice to remove all records from the list regularly. If a group of Media records is needed for a sustained period of time, consider creating a <a href="#">Package</a> .           |

## Edit Media Records in the Media Working List

Media records in the list can be opened for some editing without having to select the record in the Media module.

- Select **Edit** below a thumbnail in the Media Working List. The **Edit Media Record** window opens.

## Downloading Digital Files from the Media Working List

Users may download the digital files in their Media Working List individually or grouped in a zip folder.

1. Select the images to download, then select **DOWNLOAD** in the upper left of the Media Working List. The **Select File to Download** window opens.
2. Select the Image Size or Template and enter **Remarks**. Users have the option of scheduling the download. Downloads of numerous large files require time and system resources.
3. Select **DOWNLOAD**. The files will download following the user's Chrome workstation defaults.

The downloaded files are accessible from the lower left of the browser page. If the download is scheduled, the user will receive an email message when it is complete.



The standard defaults for downloading are used: the downloaded file will be placed in the user's workstation Downloads folder, under their User Name on the C:\ drive, and the individual files or zip folders containing multiple files will be given default names (a cryptic string for zip folders). Users can change Chrome settings to enable renaming the download files and zip folders and selecting the download folder.

## Other Uses for the Media Working List

The Media Working List may be used to [link Media records to records in other modules](#).

In the Media module (only), the list may be used to [add Media records to a Package](#).

# Add Records to the Media Working List

## Add to the Media Working List from the Media module

When adding from the Media module, the contents of the list will be replaced by the current selection of Media records.

1. Select **Media Working List** from the toolbar. The list will open across the bottom of the page.
2. Select **Add Current Selection** in the Media Working List toolbar.
3. Select **CONFIRM** in response to the prompt "Are you sure you want to replace the records in the Working List?"
4. The current selection of Media records will be added to the list, replacing the records that were already in there.

## Add to the Media Working List from Other Modules

When adding Media records from all other modules, the current records' linked Primary Media record is added to the list. The current record itself is not added to the list since it is not a Media record.

Thumbnail images are [dragged and dropped](#) into the list from the following locations:

- [List](#) or [Light Box](#) display mode
- Record Set tab
- The [Media Cross-Reference \(MediaXRefs\)](#) widget
- [Dashboard queries](#)

# Standard Feature Widgets

TMS Collections provides feature [widgets](#) which support flexibility in its use. They are configured in TMS Composer on [Data Forms \(Data Entry Views\)](#) the same as single text fields.

They are comprised of multiple fields or multiple records that are related to the current record. Some provide the ability to link the current record to records in other modules, while others create records that "belong" to the current record.

Unless noted otherwise, they are available in all modules of TMS Collections.

| Feature Widget   | Function  | Contains Multiple Fields | Can Create Multiple Records | Link to Other Modules | Used In  |
|--|---|--------------------------|-----------------------------|-----------------------|--|
| <a href="#">Alternate Names</a>                          | Used to record names that differ from a record's primary name, such as name translations, alternate spellings, associated terms, etc.       | Yes                      | Yes                         | No                    | Objects module   |
| <a href="#">Alternate Numbers</a>                        | Used to record numbers that differ from a record's primary number, such as a previous number, or an assigned number in a separate database. | Yes                      | Yes                         | No                    | Bibliography, Constituents, Events, Exhibitions, Loans, Media, Objects, and Sites modules.   |
| <a href="#">Annotation ID</a>                            |   |                          |                             |                       |  |
| <a href="#">Attributes</a>                               | Links Thesaurus terms to the current record.  | No                       | Yes                         | No                    | <p>Objects module: ConXRefs - Acquisition-Related, ConXRefs - Ex-Collection-Related, ConXRefs - Object-Related, Object Records, Object Components, Object Condition, Object TMS Survey</p> <p>Bibliography module: Bibliography Records, ConXRefs - Bibliography-Related</p> <p>Constituents module: Constituent Records</p> <p>Events module: Event Records, Event Object</p> <p>Exhibitions module: Exhibition Records, Objects related to Exhibition</p> <p>Loans module: Incoming Loan, Outgoing Loan</p> <p>Media module: Media Records</p> <p>Shipping module: Shipping Records</p> <p>Sites module: Sites</p> |
| <a href="#">Linked Constituent References (ConXRefs)</a> | Links Constituent records to the current record.  | Yes                      | Yes                         | Yes                   | All modules except Constituents.   |
| <a href="#">Crystal Reports Button</a>                   | Will open Crystal Reports in order to produce reports based on the current record/selection.  |                          |                             |                       |  |
| <a href="#">Data View</a>                                | Displays a preconfigured Data View on a Data Form (Data Entry View).  | Yes (read-only)          | No                          | No                    |  |
| <a href="#">Data View Thumbnail Composite</a>            |   |                          |                             |                       |  |
| <a href="#">Dimensions</a>                               | Used to record physical measurements.   | Yes                      | Yes                         | No                    | Crates, Objects, Sites, and Shipping records.  |
| <a href="#">eMuseum Lookup</a>                           | Navigates to eMuseum.   | n/a                      | n/a                         | n/a                   |  |

|                                      |   |                 |     |     |   |
|--------------------------------------|---|-----------------|-----|-----|---|
| Flex Fields                          | User-defined fields that can be used for searching.                         | Yes             | Yes | No  | Bibliography module: Bibliography Records<br>Constituents module: Constituent Records, Constituent Geography<br>Events module: Event Record, Event Geography, Event Object<br>Exhibitions module: Exhibition Records, Exhibition Venues, Objects related to Exhibition<br>Loans module: Incoming Loan, Objects in Incoming Loan, Outgoing Loan, Objects in Outgoing Loan<br>Media module: Media Records<br>Objects module: Object Records, Deaccessioning, Object Components, Object Geography<br>Sites module: Sites, Site Geography<br>Thesaurus: Exhibition layout section |
| Geography                            | Adds flexible geographical information to a record.                         | Yes             | Yes | No  | Objects, Sites, Events, and Constituents modules. Note: it is a group of widgets on a specialized Data Form (Data Entry View).  |
| Geography References                 | Links Geographical terms from the Thesaurus to the current record.          | No              | Yes | No  |   |
| Imported Data View                   | Displays a preconfigured Data View from a different module or context.      | Yes (read-only) | n/a | n/a |   |
| Linked Media References (MediaXRefs) | Links Media records to the current record.                                  | Yes             | Yes | Yes | All modules except Media.   |
| Object Titles                        | Used to record Object Titles. An Object may have multiple Titles.           | Yes             | Yes | No  | Objects module.   |
| Public Access                        | Indicates that a record is approved to be used on an institution's website. | No              | No  | No  |   |
| Single-Value Text Entries            | User-defined fields which allow formatting.                                 | No              | No  | No  |   |
| Static Text or Holding Place         |   |                 |     |     |   |
| Status Flags                         | Short text alerts that display on records.                                  | No              | Yes | No  | Objects, Bibliography, Sites, and Media modules.  |
| Status Terms                         | Links Thesaurus terms to the current record.                                | No              | Yes | No  | Exhibitions module: Exhibition Records, Exhibition Venues, Objects related to Exhibition<br>Loans module: Incoming Loan, Objects in Incoming Loan, Outgoing Loan, Objects in Outgoing Loan  |
| Text Entries                         | User-defined, free text fields which allow formatting.                      | Yes             | Yes | No  |   |
| Valuation                            | Creates Insurance and Loan valuations.                                      | Yes             | Yes | No  | Objects, Loans, Shipments, and Insurance Policies.  |

# Alternate Numbers

The **Alternate Numbers widget** is used to record numbers that differ from a record's primary number, such as a previous number, or an assigned number in a separate database.

They are available in Bibliography, Constituents, Events, Exhibitions, Loans, Media, Objects, and Sites records.

 Refer to the [Alternate Number Descriptions](#) section for information on configuring alternate numbers.

In a record, alternate numbers are displayed in a grid format. The following buttons are displayed in the upper right above the grid.

## Toolbar buttons:

| Button                     | Icon  | Function  |
|----------------------------|---|---|
| Add a New Alternate Number |  | Create a new Alternate Number.  |
| Delete an Alternate Number |  | Delete an Alternate Number.   |
| Add or Remove Columns      | Add or remove columns   | Each Alternate Number row also displays the <i>Description</i> , <i>Remarks</i> , <i>Begin Date</i> , <i>End Date</i> fields. The fields are hidden/unhidden by clicking on the Add or Remove Columns button and selecting which fields should be seen. |
| Save Layout as Preference  | Star  | Saves the current column selection as either a User-specific or Global preference so that it will display instead of the default column selection.  |

 The heading for any of the *Alternate Numbers* fields can be clicked to sort the names by that field.

## Alternate Number Fields

| Alternate Number Field        | Description  | Field Entry                 | Authority Controlled? |
|-------------------------------|--|-----------------------------|-----------------------|
| Alternate Number              | An Alternate Number or URL for a record.   | Free text                   | No                    |
| Alternate Number Description* | A list of descriptions for an entry, such as temporary receipt number, former number, lender's number, or website link. Refer to the <a href="#">Alternate Number Descriptions</a> for information on adding, editing, and deleting Alternate Number Descriptions. | Text pull-down              | Yes                   |
| Remarks                       | Any notes about an Alternate Number.   | Free text                   | No                    |
| Begin Date                    | The starting date of the use of the Alternate Number.  | Calendar assistant or typed | No                    |
| End Date                      | The ending, or stop date of the use of the Alternate Number.   | Calendar assistant or typed | No                    |

## Creating a New Alternate Number

1. Navigate to the *Alternate Numbers* widget on a [Data Form \(Data Entry View\)](#).
2. Select **Add**  in the upper right above the widget. A new row will appear in the grid.
3. Enter data in the desired fields.

 Alternate Numbers may also be created when [changing an Object Number](#) by selecting the option "Save the previous Object Number as an Alternate Number."

## Editing Alternate Numbers

1. Select an alternate number in the grid.
2. Update information in the desired fields.

## Deleting Alternate Numbers

1. Select an alternate number in the grid.
2. Select **Delete**  in the upper right above the widget.
3. A prompt opens asking if the alternate number should be deleted. Select **Yes** to delete or **No** to cancel.

For security settings, see **Alternate Numbers** on the [Standard Feature Widgets Security](#) page.

# Alternate Object Names

Alternate Object Names are added using the **Alternate Object Names widget**. Alternate object names may include name translations, alternate spellings, associated terms. At this time, only Object records may have multiple names assigned using this widget.

In a record, alternate names are displayed in a grid format. The following buttons are displayed in the upper right above the grid.

## Toolbar buttons:

| Button                    | Icon  | Function   |
|---------------------------|---|--|
| Add a New Alternate Name  |  | Create a new alternate name.   |
| Delete an Alternate Name  |  | Delete an alternate name.  |
| Add or Remove Columns     | Add or remove columns   | Each alternate name displays in a row in a grid and is accompanied by the <i>Object Name Type, Language, Remarks and Active</i> fields. The <i>Remarks</i> and <i>Language</i> fields can be hidden or made visible in the grid by clicking on the Add or Remove Columns button and selecting which fields should be seen. |
| Save Layout as Preference | Star  | By clicking the star icon, the layout of fields displayed in the grid can be saved as either a User-specific or Global preference, so that very time that <a href="#">Data Form (Data Entry View)</a> is loaded, it will have the columns that have been selected.   |
| Move Up and Move Down     | Up and Down Arrows  | Use the move up and move down buttons to change the display order of the alternate names.  |
| Set As Primary Name       | Thumbtack   | Click to overwrite the <i>Object Name</i> field with the selected alternate name.  |
| Refresh                   | Arrows in a circle  | Resets the widget so that it is no longer in Edit mode.  |



The heading for any of the *Alternate Object Names* fields can be clicked to sort the names by that field.

## Alternate Object Name Fields

| Field                 | Description  | Field Entry    | Authority Controlled? |
|-----------------------|--|----------------|-----------------------|
| Object Name Type      | A type of alternate object name, such as also known as, former name, or informal name. | Text pull-down | Yes                   |
| Language              | The language of the alternate object name.   | Text pull-down | Yes                   |
| Alternate Object Name | An alternate object name for an object.  | Free text      | No                    |
| Remarks               | Any notes associated with an alternate object name entry.                              | Free text      | No                    |
| Active                | Indicates whether an alternate object name entry is in active use.                     | Checkbox       | No                    |

## Adding an Alternate Object Name

1. Navigate to the *Alternate Object Names* widget on a [Data Form \(Data Entry View\)](#).
2. Select **Add**  in the upper right above the grid. A new row will appear in the grid.
3. Enter data in the desired fields.
4. The *Active* box is checked by default, uncheck the box if the alternate name is not active.

## Editing an Alternate Object Name

1. Select an alternate name in the grid.
2. Update information in the desired fields.

## Deleting an Alternate Object Name

1. Select an alternate name in the grid.
2. Select **Delete**  in the upper right above the grid.
3. A prompt opens asking if the alternate name should be deleted. Select **Yes** to delete or **No** to cancel



Before editing or deleting alternate object name information, consider if it may be better to uncheck the *Active* box or select a different object name type to retain the alternate name for historical record keeping.

## Alternate Object Name Order

1. Select an alternate name in the grid.
2. Use **Move Up** or **Move Down** to move it to the preferred order.

## Setting an Alternate Name as the Primary Name

1. Select an alternate name in the grid.
2. Select the **Thumbtack** (Set As Primary Name).
3. A prompt opens asking if the *Object Name* field should be overwritten with the selected alternate name. Select **Yes** to remove the selected alternate from the grid and add it to the *Object Name* field.

For security settings, see **Alternate Object Names** on the [Standard Feature Widgets Security](#) page.

# Annotation ID

*Content for this page will be provided in a future release.*

# Attributes (ThesXRefs)

**Attributes** are terms that have been added to a record from the Thesaurus Manager.

The purpose for adding one to a record may vary depending on the module: an Object record may have Attributes to describe the physical properties of an Object, whereas a Constituent record may have Attributes related to a person's culture or gender.

The **Attributes (ThesXRefs) widget** displays Attribute terms in a grid on a [Data Form \(Data Entry View\)](#). The widget is pre-configured for the Attribute Types (Thesaurus Xref Types) that will display on the Data Form. Refer to [Configuring Standard Feature Widgets](#) and [Managing Thesaurus Cross Reference Types](#) for instructions on configuring the Attributes widget.

## Attributes (ThesXRefs) Fields

| Field           | Description  | Field Entry                     | Configuration of available values required? | Remarks   |
|-----------------|--|---------------------------------|---|---|
| Type            | The context or type of an Attribute. Can be used to open the Thesaurus Manager to a specific Thesaurus access point. | Text pull-down                  | Yes   | Refer <a href="#">Managing Thesaurus Cross Reference Types</a> for instructions on managing Thesaurus Xref Types.   |
| Value           | The Thesaurus controlled Attribute term.   | Selected from Thesaurus Manager | Yes   |   |
| Remarks         | Comments about an Attribute.   | Free text                       | No  | Must be configured to display in TMS Composer. See <a href="#">Configuring Standard Feature Widgets</a> for instructions.   |
| Certainty Level | Certainty of accuracy for the Attribute.   | Text pull-down                  | Yes   | Must be configured to display in TMS Composer. See <a href="#">Configuring Standard Feature Widgets</a> for instructions.<br><br>Authority controlled terms are managed in the <a href="#">Other Authority</a> in the <a href="#">TMS Suite Application Configuration Utility</a> . |
| Path            | Location of the term in the Thesaurus.   | Read only                       |   | Must be configured to display in TMS Composer. See <a href="#">Configuring Standard Feature Widgets</a> for instructions.   |

## Attributes (ThesXRefs) Buttons

The first column of the Attributes grid contains four buttons: **Copy**, **Edit**, **Copy to Entire Selection** and **Delete**.

| Button                   | Icon                | Function   | Notes  |
|--------------------------|---------------------|--|--|
| Copy                     | Two sheets of paper | Creates a copy of the <i>Attribute Type</i> .                      | In order to copy an Attribute, the <i>Attribute Type</i> (Thesaurus Xref Type) must be configured to allow multiple field entries. See <a href="#">Managing Thesaurus Cross Reference Types</a> for instructions.<br><br>If the <i>Attribute Type</i> is configured to allow multiple field entries, the copy button becomes active after at least one value has been entered. |
| Edit                     | Pencil              | Add or edit an <i>Attribute Value</i> .                            |  |
| Copy to Entire Selection | Curved arrow        | Copies the <i>Attribute Value</i> across the selection of records. |  |
| Delete                   | Trash can           | Delete an <i>Attribute Value</i> .                                 | Only deletes the <i>Attribute Value</i> . Any information entered in the <i>Remarks</i> or <i>Certainty</i> fields (if configured to display) must be deleted manually from each field <i>before</i> the <i>Attribute Value</i> is deleted.  |



Before using the Thesaurus Manager, read the [Thesaurus Manager](#) section to get familiar with the terminology, layout, and functions in the application.

## Adding or Editing an Attribute Value (Term)

1. Navigate to an *Attributes* widget on a Data Form.
2. Hover the cursor over the first column in the grid next to the desired *Type* and select **Edit**. The Thesaurus Lookup window opens. If a thesaurus access point is configured for the selected *Type*, the Thesaurus Manager will open that specific place in the hierarchy. See [Managing Thesaurus Cross Reference Types](#) for more information.
3. Locate the attribute term needed.
4. **Select** or double click on the term.
5. Enter extra information in **Remarks** (optional).
6. Select a value for **Certainty Level** (optional).

## Copying an Attribute Type

If configured to do so, an *Attribute Type* can be copied so that multiple values (terms) for the same *Type* can be entered on a record.



The *Attribute Type* to be copied must have a *Value* (term) entered before it can be copied. Only the *Attribute Type* is copied, a new term must be selected.

1. Hover the cursor over the first column in the *Attributes* grid next to the desired *Type* and select **Copy**. The Thesaurus Lookup window opens. If a thesaurus access point is configured for the selected *Type*, the Thesaurus Manager will open that specific place in the hierarchy. See [Managing Thesaurus Cross Reference Types](#) for more information.
2. Follow the steps above for adding or editing an attribute term.

## Deleting an Attribute Value (Term)

Attribute terms being deleted may be configured to become *Inactive Attributes*. Refer to [Managing Thesaurus Cross Reference Types](#) for instructions.

1. Hover the cursor over the first column in the grid next to the desired *Type* from which the *Value* should be deleted and select **Delete (trash can)**.
2. A prompt opens asking if the user is sure the selected record(s) should be deleted. Select **Yes**.



If the attribute contains *Remarks* and *Certainty Level* fields, the data in those fields must be deleted from each field *before* the **Delete** button is selected.

## Copying an Attribute Value (Term) Across a Record Selection

Attribute terms can be copied across a selection of records.

1. Open a selection of records that all need an attribute term added to their record.
2. On the first record, add the attribute term to be copied if it is not already available.
3. Hover the cursor over the first column in the term's row and select **Copy to Entire Selection**.
4. The Batch Update window opens. At the top of the window, **Attributes (TheXRefs)** (read-only) is listed under **Batch Update Fields/Widgets** and the **Attribute Type** is listed under **Thesaurus Xref Types**. **Add** is selected and cannot be changed. All of the records in the current selection are listed, and those to which the attribute term will be copied are selected. **Check/Select** the records to update, or **Select All**. The **Value to Assign** to all of the selected records is displayed. The *Term* may be edited, if needed, by selecting **Thesaurus Lookup (Edit icon)**.
5. Enter extra information in **Remarks** (optional).
6. Select a value for **Certainty Level** (optional).
7. Select **APPLY**. A process report will display the status and number of records processed. Selecting **CLOSE** anytime before selecting **APPLY** will close the window without copying any status values.



Selecting **CANCEL** will clear the Batch Update window, which allows the user to change the *Thesaurus Xref Type* to be copied by choosing a type from the pull-down list. Select **LOAD/REFRESH** to display a list of records in the current selection. Enter the Value to Assign to the selection of records in the *Term* field by selecting **Thesaurus Lookup (Pencil and Paper)**. Locate the term needed and **Select** or double click on the term. The Thesaurus Lookup window closes. Select **APPLY** to copy the Attribute Value across the selected records. A process report will display the status and number of records processed.

## Deleting an Attribute Value (Term) From a Record Selection

Attribute terms can be deleted from a selection of records.

1. Open a selection of records that all need an attribute term deleted from their record.
2. Select **Batch Update** in the [TMS Collections Toolbar](#). The Batch Update window opens.
3. Select **Attributes (TheXRefs)** from **Batch Update Fields/Widgets**.
4. From **Thesaurus Xref Types**, select the type from which a term should be deleted.
5. Select **Delete**.
6. Select **LOAD/REFRESH**. A process bar displays.
7. The list of records in the current selection displays in a list, with the current value of the selected type. **Check/Select** the records to update, or **Select All**.
8. Select **APPLY**. A process report will display the status and number of records processed. Selecting **CLOSE** anytime before selecting **APPLY** will close the window without deleting any Attributes.
9. Select **CLOSE**.

For security settings, see **Attributes** and **Attributes: Batch Update** on the [Standard Feature Widgets Security](#) page.

# Crystal Reports Button

*Content for this page will be provided in a future release.*

# Data View

A Data View is a preconfigured set of fields that displays data. It is always read-only. Data Views are preconfigured in [TMS List View Designer](#).

Data Views have the following uses:

- In Data Entry Views to display consistent content across a selection of records.
- As a read-only alternative to Data Entry Views when a linked record is selected in the [Record Hierarchy Tree](#).

# Dimensions

The **Dimensions widget** is a table of values related to physical measurements.

The widget organizes measurements by *Dimension Type* and *Dimension Element*.

Dimension **Type** (Height, Length, Width) is the aspect of physical measurement. A numeric value is entered for each Dimension Type.

Dimension **Element** (Overall, Storage, Ship Size) is a group of Dimension Types that represents a category of physical measurements.

Dimension Types and Elements are predefined in the [Dimensions Authority](#).

## Using the Dimensions Widget

The Dimensions widget consists of a grid containing Elements, Dimensions, and Dimension values. Additionally, in an Object record, the widget will include a **Dimensions Label** which may be populated using selected information from the grid.

The toolbar above the grid provides the following actions:

[Add an Element](#)

[Add Dimension to an Element](#)

[Edit an Element](#)

[Delete a Dimension or an Element](#)

[Change display order of Element or Dimension](#)

[Import Dimension Values](#) (only available with **TMS Conservation Studio** license)

Below is a list of modules and contexts that use the Dimensions widget

| Module   | Context                   | Field name            |
|----------|---------------------------|-----------------------|
| Crates   | Crate record              | Crate Dimensions      |
| Objects  | Object record             | Dimensions            |
| Object   | Object Components         | Dimensions            |
| Sites    | Site record               | Dimensions            |
| Shipping | Shipment Steps Conveyance | Conveyance Dimensions |

Keep in mind that there is a difference between *adding* an Element or Dimension and *creating* an Element or Dimension.

*Adding* an Element or Dimension to the widget grid applies it to the *current record*. The Element or Dimension is selected from a preconfigured dropdown list.

*Creating* an Element or Dimension so that it is available for selection in a dropdown list in the widget requires configuration in the [Dimensions Authority](#).

For security settings, see **Dimensions** on the [Standard Feature Widgets Security](#) page.

# Add/Edit/Reorder/Delete an Element

## Add a Dimension Element

1. In the Dimensions widget, select **Add Element (++)** in the toolbar. The **Add Dimension Element** pop-up window opens.
2. Select an **Element**.
3. Optional: enter **Description**, **Remarks**, and a **Dimension Date**.
4. Select **Create**. The pop-up will close and the Element will now display in the widget grid. There will be a row for each Dimension Type that is configured for this Element.
5. In the Element row, select/check **Display Label** for the Element to be included in the generation of the Display Label. Only available in the Objects module.

## Adding vs. Configuring an Element

When *adding* an Element in the Dimensions widget, it is selected from a preconfigured dropdown list.

*Configuring* an Element so that it is available for selection in the widget, and specifying its default Dimension Types requires configuration in the [Dimensions Authority](#).

## Edit an Element

1. In the Dimensions widget, select an **Element** and select **Edit Element**. The Edit Dimension Element window opens.
2. Select Change Element to change to a different Element, enter **Description**, **Remarks**, or a **Dimension Date**.
3. Select **Update**. The pop-up will close and the Element modifications will display in the grid.
4. In the Element row, select/check **Display Label** for the Element to be included in the generation of the Display Label. Only available in the Objects module.

## Change Display Order of Elements

1. In the Dimensions widget, select an **Element**.
2. Select the **Up** or **Down** arrows to move the Element to a different display position.

## Delete an Element

1. In the Dimensions widget, select an **Element**.
2. Select **Delete** .
3. Select **Yes** to the prompt "Are you sure you want to delete this element and its dimensions"? The Element will be removed from the Dimensions widget.

# Add Dimension to an Element

1. In the Dimensions widget, select an **Element** in the grid.
2. Select **Add Dimension**  in the toolbar. A new row will be added to the grid underneath the Element.
3. Enter the following in the new row and then navigate away from the grid (click outside of it).
  - Select a **Dimension Type**
  - for the **Primary Unit of Measurement**, enter a numeric **value** and select a **Primary Unit**
  - Optional: =for the **Secondary Unit of Measurement**, enter a numeric **value** and select a **Primary Unit**
  - Select/check **Display Label** for the Dimension to be included in the generation of the Display Label. Only available in the Objects module.
  - The Dimension will be saved automatically.

## Adding vs. Creating a Dimension

When *adding* a Dimension in the Dimensions widget, it is selected from a preconfigured list of Dimension Types.

*Creating* a Dimension Type so that it is available for selection in the widget requires configuration in the [Dimensions Authority](#).

# Edit/Reorder/Delete Dimension (Types)

## Edit a Dimension

1. In the Dimensions widget, select a Dimension Type row.
2. Modify the values in the row. If changes are made to the Primary measurement value or the Unit of Measurement, values will be automatically recalculated for the Secondary Measurement (and vice versa).
3. Select/check **Display Label** for the Dimension to be included in the generation of the Display Label. Only available in the Objects module.
4. Changes are saved automatically.

## Reorder Dimensions within an Element

1. In the Dimensions widget, select a **Dimension** (Type).
2. Select the **Up** or **Down** arrows to move the Dimension to a different display position.

## Delete a Dimension

1. In the Dimensions widget, select a **Dimension** (Type).
2. Select **Delete** .
3. Select **Yes** to the prompt "Are you sure you want to delete this dimension?" The Dimension will be removed from the widget.

# Import Dimension Values

This feature is only available with a license for **TMS Conservation Studio**.

In an Object record, Dimension values from a Conservation Report may be imported into the Dimension widget.

Select **Import** in the Dimensions toolbar. A list displays of Dimension values from all Conservation Reports that are linked to the current Object record.

Select/Check one or more Dimensions and then select **Copy**. The values will be copied to the Object and display in the Dimensions widget.

# eMuseum Lookup

*Content for this page will be provided in a future release.*

# Flex Fields

**Flex Fields** are customizable fields that institutions can add to TMS Collections to store unique information. Examples of Flex Field use may include capturing and tracking data to accommodate specific workflows, or recording information in records where the data captured is unique to an institution.

There are two types of Flex Fields:

- **Ungrouped Flex Fields** are single custom fields that can be repeated with multiple values.
- **Flex Field Groups** are a collection of Flex Fields that display together have a preconfigured order in which the Flex Fields can be populated.

Flex Fields display in a grid on a [Data Form \(Data Entry View\)](#) and are identified by their preconfigured name. Refer to [Configuring Standard Feature Widgets](#) for instructions on selecting and configuring the Flex Fields to display on a Data Form, and [Flex Field Configuration](#) for instructions on creating and configuring Flex Fields.

## Fields in the Flex Field Grid

| Field   | Description                            | Field Entry                                 | Authority Controlled?       |
|---------|--|---|-----------------------------|
| Name    | The field name.                        | Read-only                                   |                             |
| Value   | The data for a specific Flex Field.    | Free text, authority list, date or checkbox | Determined by configuration |
| Date    | Date the Flex Field entry was created. | Calendar or typed                           | No                          |
| Remarks | Comments about the Flex Field entry.   | Free text                                   | No                          |

## Ungrouped Flex Fields

Adding and Editing Data in Ungrouped Flex Fields:

1. Navigate to an ungrouped Flex Field grid on a Data Form.
2. The field entry method for the *Value* field depends on how the Flex Field was configured:
  - a. Free text: text can be entered on the Flex Field grid by clicking in the cell and typing
  - b. Authority controlled: field will display a pull-down list from which a value can be chosen
  - c. Numeric text: require numbers to be entered
  - d. Dates: can either be typed or selected from the calendar
  - e. Checkboxes: click the box to select or deselect
3. The Flex Field's accompanying *Date* field can be populated by a typed date or by using the calendar.
4. The *Remarks* field is free text and can be populated by clicking in the field.

## Adding Multiple Ungrouped Flex Fields

Ungrouped Flex Fields can be [configured](#) so that they can be repeated for multiple entries. If configured to do so, follow the instructions below to add multiple ungrouped Flex Fields to a record in TMS Collections.

1. Navigate to an ungrouped Flex Field grid on a Data Form.
2. The first column in the grid appears to be empty. If there is data in the Flex Field *Value* column, **Copy** and **Delete** icons will display when the cursor is placed over the white cell in the first column. Select **Copy**.
3. A new row is created in the Flex Field grid with the *Name* and *Value* copied from the original entry. Enter a new *Value*.



If an Ungrouped Flex Field is configured to accept only a single value, the Copy icon will be inactive.

## Deleting Rows in Ungrouped Flex Fields

If [configured](#) to do so, additional Flex Fields that have been added to the widget can be deleted from the Flex Field grid on records in TMS Collections.

1. Navigate to an ungrouped Flex Field grid on a Data Form.
2. The first column in the grid appears to be empty. If there is data in the Flex Field *Value* column, **Copy** and **Delete** icons will display when the cursor is placed over the white cell in the first column. Select **Delete**. The row is deleted from the grid. If the row is the only remaining row in the grid, only the value will be deleted, the grid will remain on the Data Form.

For security settings, see **Flex Fields** on the [Standard Feature Widgets Security](#) page.

# Flex Field Groups

**Flex Field Groups** are a collection of related Flex Fields that display together and may have logical dependencies which determine the order in which the Flex Fields may be populated. This can be useful for managing workflows and approvals.

## Flex Field Groups Toolbar

| Button  | Icon   | Function   | Notes  |
|---|--------|--|--|
| Enable Flex Field Group /Delete all Flex Field Group data | Toggle | Toggle right will enable the Flex Field group to enter data. Toggle left will delete all data from the flex field group. | Whether or not this button is active depends on configuration settings for the Flex Field Group. See <a href="#">Flex Fields Configuration</a> . |

## Adding and Editing Data in Flex Field Groups

1. Navigate to a Flex Field Group grid on a [Data Form \(Data Entry View\)](#).
2. If the **Enable Flex Field Group/Delete all Flex Field Group Data** toggle is active, toggle right to enable the field group and enter data.
3. The entry methods for values, dates, and remarks for each Flex Field in the group are identical to entering data for [ungrouped Flex Fields](#). Enter data and/or edit the desired fields.

## Flex Field Groups and Logical Dependencies

Flex Field Groups can have logical dependencies that are configured to require that certain criteria from one or more fields is met before other fields in that group can be accessed. Logical dependencies added to Flex Field Groups can help make sure that every step is taken in a linear process for things such as approval processes or policy workflows.

If a Flex Field Group has logical dependencies, each field becomes active as dependencies are met.

## Deleting Data in Flex Field Groups

### Option 1:

1. Navigate to a Flex Field Group grid on a Data Form.
2. If the **Enable Flex Field Group/Delete all Flex Field Group Data** toggle is active, toggle left to delete all of the data in the Flex Field Group.
3. A prompt opens asking if the user wants to proceed. Select **Yes** to delete the data or **No** to cancel.

### Option 2:

1. Navigate to a Flex Field Group grid on a Data Form.
2. Delete data in the desired field by selecting the cell, highlighting the text, and using the **Delete** or **Backspace** keys.



Only the Flex Field value will be deleted. The grid will remain on the Data Form.

For security settings, see **Flex Fields** on the [Standard Feature Widgets Security](#) page.

# Geography

Users can add information about geographic locations to records. The flexible selection of geographical information is different from the [Geography XRefs widget](#) which links authority controlled, geographical information from a thesaurus.

Geography information is added to the current record in the Geography node in the Record Hierarchy Tree. It is not available in all modules.

[Geography Fields](#)

[Add/Edit/Delete Geography](#)

# Geography Fields

The following fields are available for entering information about geographic locations related to Objects, Constituents, Events and Sites records.

TMS Collections provides two [Data Forms \(Data Entry Views\)](#) for Geography data that contain most of these fields. Any fields that are not present on system Data Forms may be added to any form(s) using [TMS Composer](#).

| Geography Fields                       | Description   | Authority Controlled? | On System Data Form?                     |
|--|---|-----------------------|--|
| Building                               | A structure with a roof and walls.  | No                    | Yes                                      |
| City                                   | A large town.   | No                    | Yes                                      |
| Concession                             | A piece of land into which surveyed land is divided, further divided into lots.   | No                    | Yes                                      |
| Continent                              | Any of the world's main continuous expanses of land.  | No                    | Yes                                      |
| Country                                | A nation with its own government, occupying a particular territory.   | No                    | Yes                                      |
| County/Subdivision                     | A division of a state or country, or a secondary or subordinate division.   | No                    | Yes                                      |
| Cultural Region                        | An area with one relatively homogenous human activity or complex of activities.   | No                    | Yes                                      |
| Elevation                              | The height above a given level, especially sea level.   | No                    | Yes                                      |
| Excavation                             | A cavity formed by cutting, digging, or scooping.   | No                    | Yes                                      |
| Flex Fields                            | Grouped and ungrouped Flex Fields can include workflow and approval information, or information that is unique to an institution.   |                       | No<br><br>May be added to any Data Form. |
| Geography Type or Code                 | The context of a geographic location, such as Place Depicted or Place Created.  | Yes                   | Yes                                      |
| Island                                 | A piece of land surrounded by water.  | No                    | Yes                                      |
| Island Group                           | A chain, cluster, or collection of islands.   | No                    | Yes                                      |
| Latitude                               | The angular distance of a place north or south of the earth's equator, or of a celestial object north or south of the celestial equator, usually expressed in degrees and minutes.                            | No                    | Yes                                      |
| Locale                                 | A place where something happens or is set, or that has particular events associated with it.  | No                    | Yes                                      |
| Locus                                  | A center of activity, attention, or concentration, or a place where something is situated or occurs.  | No                    | Yes                                      |
| Longitude                              | The angular distance of a place east or west of the meridian at Greenwich, England, or west of the standard meridian of a celestial object, usually expressed in degrees and minutes.                         | No                    | Yes                                      |
| Lot                                    | A plot of land assigned for a particular use.   | No                    | Yes                                      |
| Map Reference Number                   | A number to define a location on a map.   | No                    | Yes                                      |
| Nation                                 | A large body of people united by common descent, history, culture, or language.   | No                    | Yes                                      |
| Notes                                  | Notes to contextualize or comment on a geographic location.   | No                    | Yes                                      |
| Political Region                       | A region defined by political features.   | No                    | Yes                                      |
| Region                                 | An area or division, especially part of a country or the world having definable characteristics but not always fixed boundaries.  | No                    | Yes                                      |
| Regional Corp                          | A corporation organized as a business for profit or nonprofit corporation to hold, invest, manage and/or distribute lands, property, funds, and other rights and assets for and on behalf of a Native region. | No                    | Yes                                      |
| River                                  | A large natural stream of water flowing in a channel to the sea, a lake, or another such stream.  | No                    | Yes                                      |
| Set at Primary Display                 | Sets the geographic location to be the primary display on the related record.   | No                    | Yes                                      |
| State/Province                         | A principle administrative division of certain countries or empires.  | No                    | Yes                                      |
| Subcontinent                           | A large, distinguishable part of a continent.   | No                    | Yes                                      |
| Subregion                              | A division of a region.   | No                    | Yes                                      |
| Township                               | A division of a county with some corporate powers.  | No                    | Yes                                      |
| UTM (WGS 84) Zone - S=South of Equator | A zone six degrees of longitude in width which is part of the Universal Transverse Mercator coordinate system.  | No                    | No<br><br>May be added to any Data Form. |
| UTM Easting (meters)                   | The eastward-measured distance (or the x-coordinate) from the central meridian of a UTM zone.   | No                    | No<br><br>May be added to any Data Form. |

|                       |  |    |                                      |
|-----------------------|--|----|--------------------------------------|
| UTM Northing (meters) | The northward-measured distance (or the y-coordinate) from the equator in a UTM zone.  | No | No<br>May be added to any Data Form. |
| Verbatim Latitude     | The original latitude of a location in its original format.  | No | Yes                                  |
| Verbatim Longitude    | The original longitude of a location in its original format.   | No | Yes                                  |
| Village Corp          | A corporation organized as a business for profit or nonprofit corporation to hold, invest, manage and/or distribute lands, property, funds, and other rights and assets for and on behalf of a Native village. | No | Yes                                  |

# Add/Edit/Delete Geography

[Geography Fields](#) lists all of the fields available for recording geographical information.

## View All Geographic Locations for a Record

1. In the desired module, navigate to the Geography node in the [Record Hierarchy Tree](#).
2. Select the Geography node to see a [List View](#) in the center panel of the page of all geographic locations that have been entered for the record.
3. The **icon** in the upper right inside of the List View can be used to add or remove fields from the list.
4. The **download button** in the upper right above the List View can be used to download the list.

## View or Edit Specific Geographic Locations in a Record

1. In the desired module, navigate to the Geography node in the tree.
2. Select the **black arrow** to the left of the node to expand it.
3. Select a specific location.
4. Information about the chosen location displays in a [Data Form \(Data Entry View\)](#) in the center panel of the page. Edit the desired fields.

## Adding Geography to a Record

1. In the desired module, navigate to the Geography node in the tree.
2. Select the **blue arrow** to the right of the node and select **Add (Module Name) Geography**, the Add Geography window opens.
3. Enter information in the desired fields.
4. Select **Add** to save or **Cancel** to close without saving.

After a geographic location has been created, the information will display in one of the available Data Forms in the center panel of the page.

## Deleting Geography from a Record

1. In the desired module, navigate to a specific location under the Geography node in the tree.
2. Select the **blue arrow** to the right of the location and select **Delete Geography**.
3. A prompt opens asking if the selected geography record should be deleted. Select **Yes** to delete or **No** to cancel.

For security settings, see **(Module Name) Geography** on the [Objects](#), [Sites](#), [Events](#), and [Constituents](#) Security pages.

# Geography References (Geography XRefs)

**Geography References (Geography XRefs)** are geographic terms that have been that have been selected from the Thesaurus Manager.

The purpose for adding one to a record may vary depending on the module: an Object record may use a term for the location depicted in a work, whereas a Site record may use a term for the location of an excavation.

The **Geography XRefs** widget manages the geography references added to a record in a grid format. Refer to [Configuring Standard Feature Widgets](#) and [Managing Thesaurus Cross Reference Types](#) for instructions on configuration.

## Geography References Fields

| Field           | Description   | Field Entry                     | Configuration of available values required? | Remarks   |
|-----------------|---|---------------------------------|---|---|
| Type            | The context of the geographic term, such as place created, or place depicted. May be used to open the Thesaurus Manager to a specific thesaurus access point. | Text pull-down                  | Yes   | See <a href="#">Managing Thesaurus Cross Reference Types</a> for instructions on managing the Thesaurus Xref Types authority. |
| Value           | The geographic term obtained using Thesaurus Manager.   | Selected from Thesaurus Manager | Yes   |   |
| Remarks         | Informational notes on the term.  | Free text                       | No  | Must be configured to display in TMS Composer. See <a href="#">Configuring Standard Feature Widgets</a> for instructions.     |
| Certainty Level | Certainty of accuracy for the geographic term.  | Text pull-down                  | Yes   | Must be configured to display in TMS Composer. See <a href="#">Configuring Standard Feature Widgets</a> for instructions.     |
| Path            | Location of the term in the Thesaurus.  | Read only                       |   | Must be configured to display in TMS Composer. See <a href="#">Configuring Standard Feature Widgets</a> for instructions.     |

## Geography References Buttons

The first column of the statuses grid contains three buttons: **Copy**, **Edit**, **Copy to Entire Selection** and **Delete**.

| Button                   | Icon                | Function  | Notes   |
|--------------------------|---------------------|---|---|
| Copy                     | Two sheets of paper | Creates a copy of the <i>Geography Xref Type</i> .              | In order to copy a type, the <i>Geography Xref Type</i> (Thesaurus Xref Type) must be configured to allow multiple field entries. See <a href="#">Managing Thesaurus Cross Reference Types</a> for instructions. If the <i>Geography Xref Type</i> is configured to allow multiple field entries, the copy button becomes active after at least one value has been entered. |
| Edit                     | Pencil              | Add or edit a <i>Geography Xref Value</i>                       |   |
| Copy to Entire Selection | Curved arrow        | Copies the Geography Reference across the selection of records. |   |
| Delete                   | Trash can           | Delete a <i>Geography Xref Value</i> .                          | Only deletes the <i>Value</i> . Any information entered in the <i>Remarks</i> or <i>Certainty</i> fields must be deleted manually from each field before the <i>Value</i> is deleted.   |



Before using the Thesaurus Manager, read the [Thesaurus Manager](#) section to get familiar with the terminology, layout, and functions in the application.

## Adding or Editing a Geography Reference

1. In the Geography XRefs widget, select **Edit** next to the desired *Type*. The Thesaurus Lookup window opens. If a thesaurus access point is configured for the selected *Geography Xref Type*, the Thesaurus Manager will open that specific place in the hierarchy. See [Managing Thesaurus Cross Reference Types](#) for more information.
2. Locate the geographic term needed, select the term and choose **Select** or double click on the term.
3. Enter extra information in **Remarks** (optional).
4. Select a value for **Certainty Level** (optional).

## Deleting a Geography Reference

If the status contains *Remarks* and *Certainty Level* fields, the data in those fields must be deleted from each field before the Delete button is clicked.

1. In the Geography Xrefs widget, select **Delete** next to the *Type* from which the *Value* should be deleted.
2. Select **Yes** in response to the prompt opens asking if the user is sure the selected record(s) should be deleted.

## Copying a Geography Reference Across a Record Selection

Geography References can be copied across a selection of records.

1. Open a selection of records that all need a geographic term added to their record.
2. On the first record, add the term to copied if it is not already available.
3. Hover the cursor over the first column in the term's row and select **Copy to Entire Selection**.
4. The Batch Update window opens. At the top of the window, **Geography Xrefs (ThesXRefs)** (read-only) is listed under **Batch Update Fields /Widgets** and the thesaurus cross-reference type to be copied is listed under **Thesaurus Xrefs Types**. **Add** is selected and cannot be changed. All of the records in the current selection are listed, and those to which the geographic term will be copied are selected.
5. The **Value to Assign** to all of the selected records is displayed in the *Term* field, and may be edited, if needed, by selecting **Thesaurus Lookup (Edit icon)** before the term is copied to the selection. If a new term is chosen, each record in the selection will have both the original term and the newly selected term added to their records.
6. Enter extra information in **Remarks** (optional).
7. Select a value for **Certainty Level** (optional).
8. Select **APPLY**. A process report will display the status and number of records processed. Selecting **CLOSE** anytime before selecting **APPLY** will close the window without copying any Geography XRefs.
9. Select **CLOSE**.



Selecting **CANCEL** will clear the Batch Update window, which allows the user to change the Thesaurus Xref Type to be copied by choosing a type from the pull-down list. Select **LOAD/REFRESH** to display a list of records in the current selection. Enter the value to assign to the selection of records in the *Term* field. Select **APPLY** to copy the Geography Reference across the selected records. A process report will display the status and number of records processed.

## Deleting a Geography Reference From a Record Selection

Geography References can be deleted from a selection of records.

1. Open a selection of records that all need a geographic term deleted from their record.
2. Select **Batch Update** in the [TMS Collections Toolbar](#). The Batch Update window opens.
3. Select **Geography Xrefs** from **Batch Update Fields/Widgets**.
4. From **Thesaurus Xref Types**, select the type from which the term should be deleted.
5. Select **Delete**.
6. Select **LOAD/REFRESH**. A process bar displays.
7. The list of records in the current selection displays in a list, with the current value of the selected type. Select the records from which the term should be deleted.
8. Select **APPLY**. A process report will display the status and number of records processed. Selecting **CLOSE** anytime before selecting **APPLY** will close the window without deleting any Geography XRefs.
9. Select **CLOSE**.



The Geography XRef widget converts deleted values to *Inactive Geography Xrefs* if it has been preconfigured to do so. Refer to [Managing Thesaurus Cross Reference Types](#) for instructions.

For security settings, see **Geography XRefs** and **Geography XRefs: Batch Update** on the [Standard Feature Widgets Security](#) page.

# Historical Dates

The **Historical Dates widget** is available in the Objects, Constituents, Bibliography, Exhibitions and Sites modules. It can be used to record dates of importance, such as:

- When an object was excavated, commissioned, or published (Objects)
- When an artist lived in a certain country, or the date that a company changed its name (Constituents)
- When an exhibition catalogue was sold in an institution's retail shop (Bibliography)
- Dates related to an exhibition, such as installation start, installation end and members' preview dates (Exhibitions)
- Dates related to a site, such as when it was founded, built, opened, or discovered (Sites)

In a record, historical dates are displayed in a grid format. The following buttons are displayed in the upper right above the grid.

## Toolbar buttons:

| Button                     | Icon                  | Function  |
|----------------------------|-----------------------|---|
| Add a new alternate number | +                     | Create a new Historical Date.   |
| Delete an alternate number | x                     | Delete a Historical Date.   |
| Add or Remove Columns      | Add or remove columns | Each Historical Date row also displays the <i>Description</i> , <i>Remarks</i> , <i>Begin Date</i> , <i>End Date</i> , and <i>Effective Date</i> fields. The fields are hidden/unhidden clicking on the Add or Remove Columns button and selecting which fields should be seen. |
| Save Layout as Preference  | Star                  | Saves the current column selection as either a User-specific or Global preference so that it will display instead of the default column selection.  |



The heading for any of the *Alternate Numbers* fields can be clicked to sort the names by that field.

## Historical Dates Fields

| Historical Dates | Description   | Field Entry   | Authority Controlled? |
|------------------|---|---|-----------------------|
| Description      | A description or reason for a Historical Date.  | Text pull-down or Free text.<br><br><div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4;">  Users can enter a term by typing directly into the field. This term will remain in the drop-down list and be available to all users.         </div> | No                    |
| Begin Date       | The beginning year, month, and day of a Historical Date.<br><br><div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4;">  Only the <i>Year</i> is required         </div> | Numeric   | No                    |
| End Date         | The ending year, month, and day of a Historical Date. May be left blank if there is no end date.  | Numeric   | No                    |
| Effective Date   | The date upon which a Historical Date takes effect.   | Numeric   | No                    |
| Remarks          | Any notes or comments about a Historical Date.  | Free text   | No                    |

## Creating a Historical Date

1. In the Historical Dates widget, select **Add** to the right above the grid, a new row will appear.
2. Choose a *Description* from the drop-down menu or type directly in the field.
3. Enter a *Begin Date* and *End Date*.
4. Enter remarks if desired. The ... button that appears in the *Remarks* field can be clicked to expand the field in a new window.

## Editing a Historical Date

1. In the Historical Dates widget, select the date to edit.
2. Edit the desired fields.

## Deleting a Historical Date

1. In the Historical Dates widget, select the date to delete.
2. Select **Delete**  to the right above the grid.
3. A prompt opens asking if the date record should be deleted. Select **Yes** to delete it or **No** to cancel.

For security settings, see **Historical Dates** on the [Standard Feature Widgets Security](#) page.

# Imported Data View

*Content for this page will be provided in a future release.*

# Data View Thumbnail Composite

*Content for this page will be provided in a future release.*

# Linked Constituent References (ConXRefs)

The **ConXRefs Widget** links Constituents to the current record. It is available in every module except Constituents.

On a [Data Form \(Data Entry View\)](#), the widget is labeled **(*module name*) Related Constituents** in all modules except Objects and Media.

In the Objects module, there are multiple ConXRefs widgets named for specific Roles: **Maker/Artist/Sitter**, **Source/Donor**, **Previous Owners/Ex-Collection Related**, **Rights Related Constituent XRefs**, **Auction House or Transferee** ([Object Deaccession Context](#)).

In the Media module, the ConXRefs widgets are: **Rendition-Related Constituents - Display Media Renditions**, **Photographer**.

## Link a Constituent to the Current Record

1. Select the widget labeled **(*Module Name*)- Related Constituents** (or the appropriate widget in Objects or Media).
2. Select **Add** . The Constituent Search window opens.
3. Enter a name in the search box. A suggested list of Constituents displays below.
4. Select a **Constituent Name**.
5. Choose **Select**. The window will close and the selected Constituent will display in a new row in the widget.
6. A preconfigured default [Role](#) will be selected, but a different one may be selected (if available).

## Remove a Constituent Link from the Current Record

1. Select the widget labeled **(*Module Name*)- Related Constituents** (or the appropriate widget in Objects or Media).
2. Select the Constituent whose link will be removed from the record.
3. Select **Delete**  to the right above the field.
4. A prompt opens asking if the constituent link should be removed.
5. Select **Yes** to remove the link or **No** to cancel.

For security settings, see **ConXRefs (1)**, **ConXRefs (2)** and **ConXRefs (3)** on the [Constituents Module Security](#) page.

# Change Display Order of Linked Constituents

1. In a record, in the widget labeled *(Module Name or Context Name) - Related Constituents*, select a Constituent
2. Use the **Up** and **Down** arrows to the right above the field to change the position in the order

# Link the Current User to a Record

The current user must be a Constituent to use this method.

1. Select the widget labeled *(Module Name or Context Name) - Related Constituents*.
2. Select **Constituent (person)**. A new row will be added to the widget with the name of the current user.
3. Select a **Role** from the list in order to modify the default Role for the newly linked Constituent.

# Linked Media References (MediaXRefs)

The **MediaXRefs widget** is available in all modules except Media. It references Media records that are linked to the current record.

The widget is configured in [TMS Composer](#) as either a table/grid format, or a scrollable ribbon.

The following functions are available in the widget:

- [Link](#) a new or existing Media record to the current record
- [Edit](#) a Media record already linked to the current record
- [Download](#) the linked Media record's image file
- [Annotate](#) the linked Media record's image file

## MediaXRefs Toolbar

| Option  | Function  |
|---|---|
|  | Opens the sub-menu containing options for <a href="#">linking a Media record to the current record</a> .  |
|  | Removes the link between the Media record to the current record.  |
| <a href="#">Media Working List (images)</a>                                       | Links selected records in the Media Working List to the current record. The list must contain records and at least one item must be selected.             |
| <a href="#">Edit</a>  | Edit a linked Media record.   |
| Cut (scissors)  | Remove the Media record from its current position in the widget (for reordering purposes).  |
| Paste   | Add the Media record in the selected position in the widget (for reordering purposes).  |
| List (grid)   | Switches MediaXRefs widget to grid-style. Only available when there are 50 or more linked Media records in the widget.                                    |
| Refresh   | Returns the MediaXRefs widget to ribbon-style. Only available after switching to grid-style when there are 50 or more linked Media records in the widget. |

For security settings, see [Linked Media References \(MediaXRefs\)](#) on the [Standard Feature Widgets Security](#) page.

# Edit Media Records in the MediaXRefs Widget

In the MediaXRefs widget, fields pertaining to the link between the current record and the Media record are accessible.

Additionally, a preconfigured selection of fields in [Main Media Record](#) is accessible without having to open the record in the Media module.

1. Select a linked Media record in the widget. Depending on the display, this will either be selecting a grid row, or checking the checkbox beneath a thumbnail image.
2. Select **Edit**.
3. The Edit Media records pop-up will open, enter values or make modifications to fields.
4. Select **Close**  the changes will be saved automatically.

For security settings, see [Linked Media References \(MediaXRefs\)](#) on the [Standard Feature Widgets Security](#) page.

# Link Media Records in the MediaXRefs widget

To link a Media record to the current record, select **Add**  in the **MediaXRefs widget** toolbar.

A sub-menu with linking options displays on the right side of the widget. It contains 4 options for linking new or existing Media records.

## Drag and Drop

Use this method to create a new Media record by dragging and dropping a file in the local file system. The file will automatically be linked to the current record.

1. Locate a media file in File Explorer, or a thumbnail image in a Media record, or in the Linked Media widget in another tab or session.
2. Drag and drop the media file (or image) where it reads **Drag and Drop File Here**.
3. The File Upload Options\* window will open (unless **Show on every upload** is unchecked in the settings).
4. Specify a Department for the new record, provide a path to a network folder to which the file will be uploaded and select **Upload**.
5. If the file already exists in the folder specified in the path, a message will display, with the option to save the new file as a copy of the existing file, or to cancel the upload Save the file as a copy.

## Select a file

Use this method to create a new Media record by selecting a file that is located in the local file system. The file will automatically be linked to the current record.

1. Choose **Select a File** to find a file that will be used to create a new Media record.
2. File Explorer will open for browsing. Select the image file to create a new Media record and select **Open**.
3. The File Upload Options\* window will open (unless **Show on every upload** is unchecked in the Settings).
4. Specify a Department for the new record, provide a path to a network folder to which the file will be uploaded and select **Upload**.
5. If the file already exists in the folder specified in the path, a message will display, with the option save the new file as a copy of the existing file, or to cancel the upload Save the file as a copy.

## Add New

Use this method to create a new Media file from a file in a configured network folder. Network folders are configured in TMS Composer.

This is the same process as the Toolbar function Add New record > Media. The file will automatically be linked to the current record.

1. Select **Add New** to find a file in a preconfigured network folder that will be used to create a new Media record.
2. The Add New Media record window opens. Follow the steps to Add a new Media record.

## Lookup

Use this method to locate an existing Media record and link it to the current record.

1. Select **Add New** to find a file in a preconfigured network folder that will be used to create a new Media record.
2. The Add New Media record window opens. Follow the steps to [Add a new Media record](#).



The MediaXRefs sub-menu toolbar with 2 options: **Settings** and **Close**

**Settings** opens File Upload Options window to set default settings for "Drag and Drop" or "Select a File."

- Department: set default Department for the new Media record
- Path: set default Path to a network folder to which files will be uploaded
- Show options: show the "Upload File Options" dialog window for every upload

**Close** will close the sub-menu with linking options.

For security settings, see **Linked Media References (MediaXRefs)** on the [Standard Feature Widgets Security](#) page and **Media Drag and Drop Functionality** on the [Media Module Security](#) page.

# Link Records from the Media Working List

Media Records in the [Media Working List](#) are available for linking to the current record. The Media Working List must contain at least one record, and at least one record must be selected.

This option is not available in all modules.

1. Select **Media Working List** from the TMS Collections toolbar.
2. The list will open. **Select/Check** the Media files to link.
3. [Search for a record](#).
4. In the Media node of the [Record Hierarchy Tree](#), select **Add from Media Working List**.

For security settings, see **Linked Media References (MediaXRefs)** on the [Standard Feature Widgets Security](#) page.

# Download or Annotate Media Images in the MediaXRefs widget

## Download the Digital File of a Linked Media Record

1. Select a Media record in the widget.
2. Select Edit. The Edit Media record window opens.
3. Select Download.
4. Follow the steps to [Download a Media file](#).

## Annotate the Digital File of a Linked Media Record

The [Annotation Editor](#) feature in the Media module is available for linked Media records.

1. In the widget, select the **Edit** icon beneath the linked Media record.
2. The Edit Media record window opens. Select **Annotation Mode**.
3. Follow the steps in [Annotation Editor](#).
4. After the Annotation record is created, it will be automatically linked to the current record and display in widget.

For security settings, see **Downloading Images** and **Annotation Records** on the [Media Module Security](#) page.

# Remove the Link to a Media Record in the MediaXRefs Widget

1. **Select/check** a record in the widget.
2. Select **Delete** .
3. A prompt will open asking if the selected records should be removed. Select **Yes**.

The record will be removed from the widget, and no longer display under the Media node in the [Record Hierarchy Tree](#).



Removing a link to a Media record only deletes the *link* between the current record and the Media record. The Media record itself will not be deleted. A Media record can only be deleted from the Media module.

For security settings, see **Linked Media References (MediaXRefs)** on the [Standard Feature Widgets Security](#) page.

# List View on Data Entry View

A **List View on Data Entry View** widget displays records in a read-only List View directly on a Data Entry View, in conjunction with other widgets. The widget is useful when it is beneficial to view the linked or logically related records at the same time as fields from the main record.

The records in the List View are either linked or logically related to the current record, such as Object Components.

Unlike a List View that displays records when a node in the [Record Hierarchy Tree](#) is selected, the widget has limitations:

- an alternate List View cannot be selected
- there is no toolbar, so Download or navigation to the records is not available

This widget is not available in all modules.

# Public Access

*Content for this page will be provided in a future release.*

# Single-Value Text Entries (Web Application field)

**Single-Value Text Entries** are user-defined fields that provide the option to save [formatted](#) text. They are also known as Web Application fields. These fields are configured in the [TMS Suite Application Configuration Utility](#). On a [Data Form \(Data Entry View\)](#), they are labeled with their configured name. They are identifiable by the formatting toolbar on the top right of the field, which is not available with other text input fields.

These differ from [Text Entries](#) in that only a single field - the text itself - can be entered or modified. Like any [text](#) field, a Single-Value Text Entry is [searchable](#) as an individual field - the only difference is that it contains formatted text.

In the field's toolbar, option buttons for formatting text include: bold, italics, numbering, bulleted, and indenting. If the user has been granted permission, there will be an additional button for editing HTML content. Spell-check is available by right-clicking on any highlighted text.



When content is pasted into a single-value text entry field, a "Paste" [pop-up](#) opens with a text box into which the content is pasted. After clicking "Paste", the pop-up will close and the pasted content will display in the field.

Single-value Text Entries may have both content and the field type modified. Refer to [Batch Update Single-value Text Entries](#).

For security settings, see [Text Entries](#) and [Text Entries: Batch Update](#) on the [Standard Feature Widgets Security](#) page.

# Batch Update Single-Value Text Entries

Single Value Text Entries may be batch updated in two ways: content (using **Update** ) or the type of field itself (using **Move**).

1. Open a selection of records that all need a Single-Value Text Entry updated.
2. Select **Batch Update** in the [TMS Collections Toolbar](#). The Batch Update window opens.
3. Select *Single-Value Text Entry* from **Batch Update Fields/Widgets**.
4. From **Text Type**, select the text type (the Web Application Field) to be updated.
5. Available options are: **Update** and **Move**.

## Batch Update Options

**Update:** add or remove the text from a Web Application field for a group of one or more records.

1. Select **Load/Refresh**. A list of the current records and their value for the chosen Text Type will display.
2. **Check/Select** the records to update, or **Select All**.
3. Enter a **Value to Assign**.
4. Select **Apply**. A Process Report displays the status and the total number of records that were updated. If the **Total** and **Processed** counts are not equal, then an error has occurred and the linked records require examination.
5. Select **Close**.

**Move:** moves text from one text type to another text type for a group of one or more records. This results in the text being moved to a different Web Application Field.

1. Choose one of the following:
  - a. **Append:** moves the text from the selected text type and append it to any existing text in the text type to which it is moved.
  - b. **Override:** moves the text from the selected text type and delete any existing text in the text type to which it is moved.
  - c. **Skip:** moves the text from the selected text type to another text type only if the text type to which it is being moved is empty. If the target text type already contains text, the text entry will not be moved.
  - d. **Stop**
2. Select **Load/Refresh**. A list of the current records and their value for the chosen Text Type will display.
3. **Check/Select** the records to update, or **Select All**.
4. Under **Value to Assign**, choose the text type to which the text entry should be moved.
5. Select **Apply**. A Process Report displays the status and the total number of records that were updated. If the **Total** and **Processed** counts are not equal, then an error has occurred and the linked records require examination.
6. Select **Close**.

# Static Text

The Static Text widget is a container for text that will remain the same regardless of the currently open record.

It is often used to label sections or comments in a customized Data Entry View (Data Form).

# Statuses (ThesXRefs)

**Statuses** are terms that have been added to a record from the Thesaurus Manager.

The purpose for adding one to a record may vary depending on the module: an Exhibition record may have Status terms that relate to Venues, while a Loan record may have Status terms related to a linked Object's Loan Status.

The **Statuses widget** displays Status terms in a grid on a [Data Form \(Data Entry View\)](#). The widget is pre-configured for the Status Types (Thesaurus Xref Types) that will display on the Data Form. Refer to [Configuring Standard Feature Widgets](#) and [Managing Thesaurus Cross Reference Types](#) for instructions on configuring the Statuses widget.

## Statuses (ThesXRef) Fields

The Statuses grid is labeled as *Statuses-Active* or *Statuses-Active [plus context]*

| Field           | Description  | Field Entry                     | Authority Controlled? | Remarks   |
|-----------------|--|---------------------------------|-----------------------|---|
| Type            | The context for a status term. Can be used to open the Thesaurus Manager to a specific thesaurus access point. | Text pull-down                  | Yes                   | See <a href="#">Managing Thesaurus Cross Reference Types</a> for instructions on managing the Thesaurus Xref Types authority.   |
| Value           | The thesaurus controlled status term.  | Selected from Thesaurus Manager | Yes                   |   |
| Remarks         | Notes to contextualize or comment on a status term.  | Free text                       | No                    | Must be configured to display in TMS Composer. See <a href="#">Configuring Standard Feature Widgets</a> for instructions.   |
| Certainty Level | Certainty of accuracy for the status term.   | Text pull-down                  | Yes                   | Must be configured to display in TMS Composer. See <a href="#">Configuring Standard Feature Widgets</a> for instructions.<br><br>Authority controlled terms are managed in the <a href="#">Other Authority</a> in the <a href="#">TMS Suite Application Configuration Utility</a> . |
| Path            | Location of the term in the thesaurus.   | Read only                       |                       | Must be configured to display in TMS Composer. See <a href="#">Configuring Standard Feature Widgets</a> for instructions.   |

## Statuses (ThesXRef) Buttons

The first column of the statuses grid contains three buttons: **Copy**, **Edit**, **Copy to Entire Selection** and **Delete**

| Button                   | Icon                | Function  | Notes  |
|--------------------------|---------------------|---|--|
| Copy                     | Two sheets of paper | Creates a copy of the <i>Status Type</i> .                      | In order to copy a status, the <i>Status Type</i> (Thesaurus Xref Type) must be configured to allow multiple field entries. See <a href="#">Managing Thesaurus Cross Reference Types</a> for instructions.<br><br>If the <i>Status Type</i> is configured to allow multiple field entries, the copy button becomes active after at least one value has been entered. |
| Edit                     | Pencil              | Add or edit a <i>Status Value</i> .                             |  |
| Copy to Entire Selection | Curved arrow        | Copies the <i>Status Value</i> across the selection of records. |  |
| Delete                   | Trash can           | Delete a <i>Status Value</i> .                                  | Only deletes the <i>Status Value</i> . Any information entered in the <i>Remarks</i> or <i>Certainty</i> fields must be deleted manually from each field <i>before</i> the <i>Status Value</i> is deleted.   |



Before using the Thesaurus Manager, read the [Thesaurus Manager](#) section to get familiar with the terminology, layout, and functions in the application..

## Adding or Editing a Status Value (Term)

1. Navigate to a *Statuses-Active* widget on a Data Form.
2. Hover the cursor over the first column in the grid next to the desired *Type* and select **Edit**. The Thesaurus Lookup window opens. If a thesaurus access point is configured for the selected *Status Type*, the Thesaurus Manager will open that specific place in the hierarchy. See [Managing Thesaurus Cross Reference Types](#) for more information.
3. Locate the status term needed.
4. **Select** or double click on the term.
5. Enter extra information in **Remarks** (optional).
6. Select a value for **Certainty Level** (optional).

## Copying a Status Type

If [configured](#) to do so, a *Status Type* can be copied so that multiple values (terms) for the same *Type* can be entered on a record.



The *Status Type* to be copied must have a *Value* (term) entered before it can be copied. Only the *Status Type* is copied, a new term must be selected.

1. Hover the cursor over the first column in the *Statuses-Active* grid next to the desired *Type* and select **Copy**. The Thesaurus Lookup window opens. If a thesaurus access point is configured for the selected *Type*, the Thesaurus Manager will open that specific place in the hierarchy. See [Managing Thesaurus Cross Reference Types](#) for more information.
2. Follow the steps above for adding or editing an Attribute Value.

## Deleting a Status Value (Term)

When statuses are deleted from a record, they can be configured to become *Inactive Statuses*. Refer to [Managing Thesaurus Cross Reference Types](#) for instructions.

1. Hover the cursor over the first column in the grid next to the desired *Type* from which the *Value* should be deleted and select **Delete**.
2. A prompt opens asking if the user is sure the selected record(s) should be deleted. Select **Yes**



If the status contains *Remarks* and *Certainty Level* fields, the data in those fields must be deleted from each field *before* the Delete button is selected.

## Copying a Status Value (Term) Across a Record Selection

Status Values can be copied across a selection of records.

1. Open a selection of records that all need a *Status Value* added to their record.
2. On the first record, add the *Status Value* to be copied if it is not already available.
3. Hover the cursor over the first column in the grid next to the desired *Type* and select **Copy to Entire Selection**.
4. The Batch Update window opens. At the top of the window, *Statuses (TheXRefs)* (read-only) is listed under *Batch Update Fields/Widgets* and the *Status Type* is listed under *Thesaurus Xref Types*. **Add** is selected and cannot be changed. All of the records in the current selection are listed, and those to which the *Status Value* will be copied are selected. **Check/Select** the records to update, or **Select All**.
5. The *Value to Assign* to all of the selected records is displayed. The *Term* may be edited, if needed, by selecting **Thesaurus Lookup (Edit icon)**.
6. Enter *Remarks* and *Certainty* if desired.
7. Select **APPLY**. A process report will display the status and number of records processed. Selecting **CLOSE** anytime before selecting **APPLY** will close the window without copying any attribute values.



Selecting **CANCEL** will clear the Batch Update window, which allows the user to change the *Thesaurus Xref Type* to be copied by choosing a type from the pull-down list. Select **LOAD/REFRESH** to display a list of records in the current selection. Enter the Value to Assign to the selection of records in the *Term* field by selecting **Thesaurus Lookup (Pencil and Paper)**. Locate the term needed and **Select** or double click on the term. The Thesaurus Lookup window closes. Select **APPLY** to copy the Status Value across the selected records. A process report will display the status and number of records processed.

## Deleting a Status Value (Term) From a Record Selection

Status terms can be deleted from a selection of records.

1. Open a selection of records that all need a status term deleted from their record.
2. Select **Batch Update** in the [TMS Collections Toolbar](#). The Batch Update window opens.
3. Select **Statuses (ThesXRefs)** from **Batch Update Fields/Widgets**.
4. From **Thesaurus Xref Types**, select the type from which a term should be deleted.
5. Select **Delete**.
6. Select **LOAD/REFRESH**. A process bar displays.
7. The list of records in the current selection displays in a list, with the current value of the selected type. **Check/Select** the records to update, or **Select All**.
8. Select **APPLY**. A process report will display the status and number of records processed. Selecting **CLOSE** anytime before selecting **APPLY** will close the window without deleting any Statuses.
9. Select **CLOSE**.

For security settings, see **Status Terms** on the [Standard Feature Widgets Security](#) page.

# Status Flags

**Status Flags** are short-text alert fields.

The **Status Flags widget** displays all of the flags linked to the current record.

Presently, the widget is available only in the Objects, Bibliography, Sites and Media modules.

There are two types of Status Flags:

- **General** Status Flags may include Copyright Restrictions, Needs Photography, or Restricted
- **Conservation** Status Flags may include Needs Conservation, Too Fragile for Viewing, or Damaged (this option is not available to all users)

See [Configuring Standard Feature Widgets](#) for instructions on selecting the flags that display in the widget.

See [Status Flags Configuration](#) for instructions on creation and configuration.

## Adding and Removing Status Flags on a Record

1. Navigate to a Status Flags widget on a record.
2. Select **Manage Status Flags** on the right side of the widget, the Manage Status Flags window opens.
3. Use the radio buttons to sort the status flags alphabetically or by selected status flags first.
4. Use the filter checkboxes (General Status Flags or Conservation Status Flags) to select which type display in the list below. If a user does not have permission to view conservation Status Flags, this option will not be available and only the general Status Flags will display. In the list of status flags, the Status Flag column header can be clicked to sort the list in ascending or descending alphabetical order
5. Select the box to the left of a Status Flag to add it to the record, or deselect the box to remove it.
6. When finished, select **Close**. The changes made to the Status Flags will be reflected in the widget

For security settings, see **Status Flags: General**, **Status Flags: Assigning Conservation Status Flags**, and **Status Flags: Viewing Conservation Status Flags** on the [Standard Feature Widgets Security](#) page.

# Text Entries

**Text Entries** are fields of text or HTML content attached to records or contexts inside records. Examples of Text Entries may include text used for wall labels of objects, biographies of constituents, or surveys of sites. Text Entries are configured in the [Text Types Authority](#) section of the [TMS Suite Application Configuration Utility](#).

The **Text Entries Widget** displays text entries in a grid on a [Data Form \(Data Entry View\)](#). The following buttons are displayed in the upper right above the grid.

## Toolbar buttons:

| Button                    | Icon   | Function  | Notes   |
|---------------------------|--|---|---|
| Save Layout as Preference | Star   | By clicking the star icon, the layout of fields displayed in the grid can be saved as either a User-specific or Global preference, so that very time that Data Form is loaded, it will have the columns that have been selected in the order specified.   |   |
| Add or Remove Columns     | Two rectangles   | Each Text Entry displays in a row in a grid and is accompanied by the <i>Text Type, Date, Author, Purpose, Status, Language, and Remarks</i> fields.<br><br>These fields can be hidden or made visible in the grid by clicking on the Add or Remove Columns button and selecting which fields should be seen. | The column order can be changed by clicking on a heading for any field and dragging it to the desired position. |
| Copy to Entire Selection  | Curved arrow   | Copies the text entry across the selection of records.  |   |
| Add a new text entry      |   | Create a new text entry   |   |
| Edit a text entry         | Pencil and paper   | Opens the text entry where desired fields can be edited.  |   |
| Delete a text entry       |  | Delete a text entry   |   |

 The heading for any of the Text Entry fields can be clicked to sort the text entries by that field.

## Text Entry Fields

| Edit Window Fields | Description   | Field Entry                 | Authority Controlled? |
|--------------------|---|-----------------------------|-----------------------|
| Author             | Author of the Text Entry.   | Constituent Lookup          | Yes                   |
| Language           | The Language in which the Text Entry is written.  | Text pull-down              | Yes                   |
| Purpose            | The purpose of the Text Entry, such as Research, Online Exhibit, or Publication.  | Free text or text pull-down | No                    |
| Remarks            | Comments related to the Text Entry.   | Free text                   | No                    |
| Text Date          | Date the Text Entry was created.  | Typed Date                  | No                    |
| Text Entry         | Area where the Text Entry text or HTML content* is entered. In the toolbar, option buttons for formatting text include: bold, italics, numbering, bulleting, and indenting. If the user has been granted permission, there will be an additional button for editing HTML content. Spell-check is available by right-clicking on any highlighted text. | Free text                   | No                    |
| Text Status        | Indicates the status of the Text Entry, such as Pending, Cancelled, or Approved.  | Text pull-down              | Yes                   |

|           |  |                |     |
|-----------|--|----------------|-----|
| Text Type | Controlled list of the type of text in an entry, such as Wall Label Text, Research Notes, Installation Notes, or Surveys.<br><br><div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;">  If a user has the security permission to add new Text Types, they can do so by going to <b>Maintenance &gt; Authorities &gt; Text Types</b> in <a href="#">TMS Suite Application Configuration Utility</a>. </div> | Text pull-down | Yes |
|-----------|--|----------------|-----|

\*HTML content such as text and images can be added to the Text Entry field with the source formatting intact.

## Adding Text Entries

1. Navigate to a Text Entry widget on a Data Form.
2. Select **Add**  in the upper right above the grid, the Edit window opens.
3. Enter information in the desired fields.
4. When finished select **Save**.

### To add HTML content to a Text Entry:

1. In a web browser, highlight the parts of a website or HTML document to be entered.
2. Click the selection and drag it onto the *Text Entry* field in the Edit window. Alternately, right click the selection and click **Copy** and then right click in the *Text Entry* field and click **Paste**.

## Editing Text Entries

1. Select a Text Entry and select **Edit** in the upper right above the grid, the Edit window opens.
2. Edit the desired fields and select **Save**.

## Deleting Text Entries

1. Select a Text Entry and select **Delete**  in the upper right above the grid.
2. Select **Yes**.

## Copying Text Entries Across a Record Selection

Text Entries can be copied across a selection of records.

1. Open a selection of records that all need a Text Entry added to their record.
2. On the first record, create the Text Entry to be copied if it is not already available.
3. From the Text Entry grid, select the Text Entry and choose **Copy to Entire Selection** in the upper right above the grid.
4. The Batch Update window opens. At the top of the window, Text Entries (read-only) is listed under *Batch Update Fields/Widgets* and the text type of the Text Entry to be copied is listed under *Text Type*. **Add** is selected and cannot be changed. All of the records in the current selection are listed, and those to which the Text Entry will be copied are selected. **Check/Select** the records to update, or **Select All**.
5. The Value to Assign to all of the selected records is displayed in the *Text Entry* field, and may be edited before the text is copied to the selection. Selecting **Show More (Two Squares)** to the right above the *Text Entry* field opens the Edit window where additional text entry fields (listed above) are available.
6. Select **APPLY**. A process report will display the status and number of records processed. Selecting **CLOSE** anytime before selecting **APPLY** will close the window without copying any text entries.
7. Select **CLOSE**.



Selecting **CANCEL** will clear the Batch Update window, which allows the user to change the text type of the text entry to be copied by choosing a *Text Type* from the pull-down list. Select **LOAD/REFRESH** to display a list of records in the current selection. Enter the value to assign to the selection of records in the *Text Entry* field. Additional information can be recorded in the Edit window by selecting **Show More (Two Squares)**. When finished entering data in these fields select **SAVE** to close the window. Select **APPLY** to copy the text entry across the selected records. A process report will display the status and number of records processed.

## Deleting Text Entries From a Record Selection

Text Entries can be deleted from a selection of records.

1. Open a selection of records that all need a Text Entry deleted from their record.
2. Select **Batch Update** in the [TMS Collections Toolbar](#). The Batch Update window opens.
3. Select **Text Entries** from **Batch Update Fields/Widgets**.
4. From **Text Type**, select the text type to be deleted from the selection of records.
5. Select the **Delete** radio button.
6. Select **LOAD/REFRESH**. A process bar displays.
7. The list of records in the current selection displays in a list, with the current value of the selected text type. Select the records from which the text entry should be deleted.
8. Select **APPLY**. A process report will display the status and number of records processed. Selecting **CLOSE** anytime before selecting **APPLY** will close the window without deleting any text entries.

9. Select **CLOSE**.

For security settings, see **Text Entries** and **Text Entries: Batch Update** on the [Standard Feature Widgets Security](#) page.

# Valuation Widget

**Valuation widgets** are used for calculating valuations for Objects. The values created by these widgets are then available for selection in other modules where Object values are needed.

The **Valuation widget** contains functionality to calculate values from one currency to another ([Calculating Valuations](#)).

## Uses and Alternate Names of the Valuation Widget

| Valuation Widget Name | Location of widget  | Valuation's usage in other modules   |
|-----------------------|---|--|
| Accession Value       | Object Record ( <a href="#">Main Object Record</a> )                    | Only available in the Object record.   |
| Local Value           | Object Valuation Record ( <a href="#">Object Valuations</a> )           | Insurance Value ( <a href="#">Loan Object Valuations</a> ), Insurance Value ( <a href="#">Shipment Object Valuations</a> ), Insurance Value ( <a href="#">Insurance Policy Object Valuations</a> ), Policy Local Value ( <a href="#">Insurance Policy Valuations</a> ) |
| Insurance Value       | Loan Record ( <a href="#">Loan Object Valuations</a> )                  | <a href="#">Shipment Object Valuations *****</a> , <a href="#">Insurance Policy Object Valuations</a>  |
| Third-party Valuation | Loan Record ( <a href="#">Loan Object Valuations</a> )                  | <a href="#">Shipment Object Valuations *****</a> , <a href="#">Insurance Policy Object Valuations</a>  |
| Total Value           | Insurance Policy record ( <a href="#">Insurance Policy Valuations</a> ) | Only available in the Insurance Policy record - for addition to the policy's Total Objects Value.  |

For security settings, see **Valuation Widget** on the [Standard Feature Widgets Security](#) page.

# Calculating Valuations

## Calculate the Value of an Object From a Foreign Currency Into the Local Currency

1. Select the **Direction arrow** so that it is pointing to the **left**.
2. Select a Currency from the drop-down menu.
3. Enter the **Currency Value**.
4. Enter the Exchange Rate.
5. Enter the Exchange Rate Date. The date should correspond with when an exchange rate value was obtained.
6. Select **Calculate (wand)**. The Local Value will be calculated.

## Calculate the Value of an Object Into a Foreign Currency

1. Select the **Direction arrow** so that it is pointing to the **right**.
2. Enter a Local Value and Exchange Rate.
3. Enter the Exchange Rate Date. It should correspond with when an exchange rate value was obtained
4. Select **Calculate (wand)**. The Currency Value will be calculated.

## Calculate the Exchange Rate

1. Enter values in Local Value and Currency Value.
2. Enter the current date for Exchange Rate Date.
3. Select **Calculate (wand)**. The Exchange Rate will be calculated.

# List Views

**List Views** are lists of records in a table format.

They are used to display records throughout TMS Collections:

- [List Display Mode](#)
- List View of [records linked from other modules to the current record](#)
- List View of [associated records from the same module](#)
- [List View on Data Entry View](#) widget
- [List View Preview](#) when performing a [Quick Search](#)

The use of the List View determines the options in its toolbar.

List Views are read-only - the fields they display cannot be edited. However, in some modules, there are options to [Batch Update fields in linked records](#).

TMS Collections provides a basic set of List Views - one for every context that requires it for display.

Customized List Views are created in [TMS List View Designer](#).

# Move Assistant

The **Move Assistant** records the movement of one or more Object Components or Crates from one location to another.

Locations may be internal or external, and may be Crates themselves (Crates can be moved into other Crates).

The Move Assistant is initiated from several places:

- In the Objects or Crates module, use the Move Assistant in the Toolbar
- The **Add Location** option under the **Object > Components > Component > Location History** node in the [Objects Hierarchy Tree](#)
- When adding a new Object, answering Yes to a prompt to record the Location History
- In the Crates module, the **Move Crate to Crate** option in the top node of the [Crates Hierarchy Tree](#)
- In the Crates module, the **Move Object to Crate** option in the Object Components node of the Crates Hierarchy Tree
- In the Crates module, the Object Components List View options: **Move selected Components** or **Move all Components**

Once a Move Type has been selected and the rest of the fields filled out accordingly, select **Move**.

## Move Assistant Fields

| Field                        | Description  | Authority Controlled? |
|------------------------------|--|-----------------------|
| Move Date                    | The date of a move. By default, the current date is automatically populated.   | No                    |
| Move Time                    | The time of a move.  | No                    |
| Target Location              | Location to which the item is being moved. Selecting the <b>Search</b> (magnifying glass) icon will open an expandable list of internal and external locations to choose from. The location may be Internal or External (all are configured in the Locations Authority). If a Crate has been moved to a location, it is available as a Target Location, even though it is not configured in the Locations Authority. | Yes                   |
| Anticipated End Date         | The date that Objects/Components are anticipated to be moved <b>from</b> a location.   |                       |
| Tickler Date                 | Date on which user(s) should be reminded of a previously scheduled movement.   |                       |
| Transaction Type             | Move Temp, Move Home, Return Home, Record Historical.  |                       |
| Level                        | A numeric level related to the selected address, site, subsite, or unit.   |                       |
| Sub-Level                    | A sub level of the value in the <b>Level</b> field.  |                       |
| Remarks                      | Notes related to the Move.   |                       |
| Purpose                      | The reason for moving the Objects/Components/Crates.   | Yes                   |
| Handler                      | Linked Constituent record for the person that physically moves objects/components to a new location.   |                       |
| Approved By                  | Linked Constituent record for the person that physically moves objects/components to a new location.   |                       |
| Component List               |  |                       |
| Move to a temporary location | Moves Objects/components to a location other than the Home location.   | No                    |
| Move to a new home location  | Moves Objects/Components to a permanent home location. If the Object/Component has an existing Home location, it will be replaced by the location to which it is being moved.  | No                    |

|                             |   |    |
|-----------------------------|---|----|
| Return to old home location | Moves Objects/Components to their recorded home locations. This option is not available for Components that do not have a recorded Home location. | No |
|-----------------------------|---|----|

See [Object Movement Security](#) for an explanation of functional security settings for Object movements.

For security settings, see the following on the [Special Functions Security](#) page:

- **Location and Movement: Accessing the Move Assistant**
- **Location and Movement: Moving a Single Object or Crate**
- **Location and Movement: Moving Objects or Crates to External Locations**

# Deactivate a Move

Movements that have been recorded cannot be deleted, but they may be deactivated, which removes the movement transaction from displaying in the Location History of the Object/Component or Crate. This may be useful for moves that were made in error.

In an Object record, in the [Objects Hierarchy Tree](#) under the **Object > Components > Component > Location History node** or in a Crate record, in the [Crates Hierarchy Tree](#) under the **Location History node**:

1. Locate the Move to be deactivated in the [List View](#) on the right.
2. **Select/Check** the Move transaction.
3. In the List View toolbar, select **Deactivate Move**.
4. Answer **Yes** to the prompt.

For security settings, see **Location and Movement: Deactivating Movement Transactions** on the [Special Functions Security](#) page.

# TMS Composer

TMS Composer is a utility that is used to manage data forms (data entry views) and a selection of application settings.

# Module Defaults

A default Data View banner and a query sorting method can be configured for each module in TMS Suite applications.

## Setting a Default Module Banner Data View

A Data View banner displays a row of information at the top of each module record when accessed from a TMS Suite application. Banner Data Views are managed through the List View Designer application the same way as other Data Views in TMS Suite applications.

1. In the main TMS Composer window, use the **Module** pull-down list to select a module.
2. In the Module Defaults pane on the right, use the **Module Banner Data** pull-down list to select a Banner Data View to display on the selected module's records.



The selected Banner Data View is only the default module banner for the TMS Suite application selected when logging in to TMS Composer.

## Setting a Default Module Query Sort

1. In the main TMS Composer window, use the **Module** pull-down list to select a module.
2. In the Module Defaults pane on the right, select either the **By Relevancy** or **By TMS Default Module Sort** radio button.

The **By Relevancy** sort option sorts queried records by multiple fields in module records where the search value may be present.

The **By TMS Defaults Module Sort** option sorts queried records by the value set in the Module Configuration window in the [TMS Suite Application Configuration Utility](#).



The selected module default query sort is only the default sort for the TMS Suite application selected when logging in to TMS Composer.

# Data Forms (Data Entry Views) in Composer

**Data Forms (Data Entry Views)** in the TMS Suite applications contain fields and features for users to view and enter record information. Each Data Form is created in a **Context** which controls where Data Forms are accessed in TMS Suite applications.

For example, a Data Form in an Objects-module *Record* context contains fields and features directly related to an object. A Data Form in the Objects-module *MediaXRefs* context, contains fields and features related to a linked Media record and displays when a linked Media record is selected from the left hand hierarchy in an Object record.

All TMS Suite applications have standard, system Data Forms in each context provided by Gallery Systems, and custom Data Forms can be created by individual institutions. Using custom Data Forms allows institutions to adapt Data Forms to a workflow, or include institution specific data, such as [Flex Fields](#).

Refer to the list of Context Descriptions section for information on all of the contexts available in TMS Suite applications and the default Data Forms supplied for each.

## Viewing Data Forms in Composer

1. In the main TMS Composer window, use the **Module** pull-down list to select a module.
2. Use the **View Contexts** pull-down list to select a context within the selected module.



While each TMS Suite application shares many contexts and Data Forms, some have contexts and Data Forms that are specifically designed for that application.

The application selected when logging into TMS Composer controls which contexts and Data Forms display when TMS Composer opens.

Once selected, the Data Forms available for that module/context display in the Data Entry Views (Data Forms) grid below. The grid displays information about each Data Form entry.

| Data Entry Views Grid Fields | Description   |
|------------------------------|---|
| View Name                    | A name for a Data Form that displays in the Available Data Entry Views pane in the lower left corner of TMS Suite applications. |
| Localized View Name          | A name for a Data Form in a localized language.   |
| Active                       | Controls whether Data Forms are available for use in TMS Suite Applications.  |
| System Code                  | A unique code assigned to System Data Forms provided by Gallery Systems.  |

## Creating a New Data Form

1. Select a module and context in the main TMS Composer window.
2. Select **Add**  in the top right corner above the Data Entry Views Grid.
3. A new Data Form entry displays in the Data Entry Views grid and is selected by default. A name is automatically generated for the new Data Form entry using the phrase *New Page* and the name of the context from which it was created.
4. Replace the auto-generated name with a name that is appropriate for the new Data Form.



The name for a custom Data Form should reflect the nature of the fields and features it contains and convey to users its purpose. After a new Data Form entry is created, Feature and Design Element widgets need to be configured. Refer to the [Designing Data Forms \(Data Entry Views\)](#) section for information.

## Copying a Data Form

A new Data Form can be created by copying a Data Form that is already available in the same context. By copying a Data Form, all Feature and Design Elements widgets in the original Data Form are copied.

Since system coded Data Forms cannot be edited, copying a system Data Form provides a way to retain the Feature and Design Element widgets from the original Data Form, and allows users to augment them with more fields that are specific to an institution, such as Flex Fields.

1. Select a module from the **Module** pull-down list.
2. Select a context in the **View Contexts** pull-down list below.
3. Select a Data Form entry in the Data Entry Views grid to be copied.
4. In the top right corner above the Data Entry Views grid, select **Copy**.
5. A new Data Form entry displays at the bottom of the grid. A name is automatically generated using the name of the original Data Form and prefixed with *Copy*.
6. Replace the auto-generated name with a name that is appropriate for the copied Data Form.



The name for a copied Data Form should reflect the nature of the fields it contains and convey to users its purpose. After a new Data Form entry is created from a copy, Feature and Design Element widgets can be added or removed from the new Data Form. Refer to the [Designing Data Forms \(Data Entry Views\)](#) section for information.

## Data Form Display Order

If a context contains multiple Data Forms, the order in which they display in the Data Entry Views grid reflects the order that they display in the Available Data Entry View pane in the lower left corner of TMS Suite application records.

To update the order:

1. Select a Data Form entry in the Data Entry Views grid.
2. In the top right corner above the grid, use the **Up** and **Down** arrows to move the selected Data Entry View in the list.



Some contexts allow for only one Data Form to be used, such as the *Media Record in MediaXRefs Pop-Up (for Imported View)* context in the Media module. If more than one Data Form is created in this context, TMS Suite applications use the first Data Form entry in the Data Entry Views grid.

## Active Data Forms

By default, all system coded Data Forms and custom Data Forms are marked active when imported or created. Marking a Data Form as inactive keeps the Data Form in the database, but does not allow for it to be available in TMS Suite applications. Active/Inactive Data Forms can be configured for each TMS Suite application independently of the others.

For example, a Data Form that is included in both TMS Collections and TMS Conservation Studio can be marked active to be available in TMS Collections, but marked inactive so that it does not display in TMS Conservation Studio.

Data Forms are marked active/inactive from the Data Entry Views grid in the main TMS Composer window by clicking the checkbox in the Active column.

## Exporting a Single Data Form

A single custom Data Form entry can be exported from the Data Entry Views grid on the main TMS Composer window.

1. Select a custom Data Form entry.
2. Click **Export** in the top right corner above the grid, a window with a progress bar opens.
3. Once the export is completed the Data Form file is saved to a computer or network location.

Refer to the [Importing and Exporting Data Forms \(Data Entry Views\)](#) section for information on batch exporting Data Forms.

## Deleting a Data Form

System coded Data Forms provided by Gallery Systems cannot be deleted. These can be identified easily by looking for a code value in the System Code column for a Data Form in the Data Entry Views grid.

Before deleting a custom Data Form, consider marking it inactive, or exporting it to save on a computer in case it is needed again in the future. Refer to the [Importing and Exporting Data Forms \(Data Entry Views\)](#) section for information.

1. Select a Data Form entry in the Data Entry Views grid, then select **Delete**  in the top right above the grid.
2. A prompt opens, asking if the Data Form entry should be deleted, select **Yes**, the Data Form entry is removed from the grid.



Fields and field values contained in Data Forms are not deleted when a Data Form is deleted.

# Importing and Exporting Data Forms (Data Entry Views)

Custom Data Forms (Data Entry Views) can be imported and exported from the TMS Composer application. Importing Data Forms is a quick way to recreate a Data Form in separate instance of TMS Suite applications or load a backup of previous configured Data Forms. Exporting custom Data Forms is recommended to save copies outside of TMS in case they are needed at a later date.

## Importing Data Forms

1. In the main TMS Composer window, select **Batch Import** at the bottom of the window, the Data Entry Views Import window opens.
2. Select **Load** at the bottom of the window and select an exported Data Form file to import. TMS Data Form files use the extension *.gsuv*. The grid in the window populates with all of the Data Form entries contained in the Data Form file.
3. The **Module** and **Context** pull-down list fields at the top of the window can be used to filter the Data Form entries in the grid below for easier management.
4. The columns in the grid display the name of the Data Forms being imported, suggested names for the Data Forms being imported, and the modules and contexts where the Data Forms are assigned.
5. Select the checkboxes to the left of the Data Form entries to include in the import process. The checkbox in the field heading can be used to select all of the Data Form entries at once.
6. Use the Suggested Data Form Name column for each entry to create new Data Form names if needed.
7. Select **Import** at the bottom to import the selected Data Forms to their respective modules and contexts.
8. A prompt opens, stating that the Data Forms were successfully imported. If any errors occurred while importing Data Forms, the prompt will list the Data Forms that were not imported.



Data Form names in each context must be unique to import successfully.

## Imported Data Forms Review

1. In the main TMS Composer window, use the **Module** and **View Contexts** pull-down list to populate the Data Entry View grid below.
2. Select an imported Data Form entry.
3. Select **Edit** above the grid on the right to open it in the Design window and make sure the properties of the widgets are configured correctly. Some properties for Feature widgets, such as Flex Fields and Data Views may need to be reconfigured.
4. Open a record in the corresponding TMS Suite application and select the Data Form to ensure that it displays and functions correctly.

## Exporting Data Forms

1. In the main TMS Composer window, select **Batch Export** at the bottom, the Data Entry Views Export window opens.
2. The grid in the middle of the window displays the Data Form entries available. The columns in the grid display the Data Form name along with the module and context to which each Data Form entry is assigned.
3. The **Module** and **Context** pull-down lists at the top of the window can be used to filter the Data Form entries in the grid.
4. Select the checkboxes next to the Data Form entries to export. The checkbox in the field heading can be used to select all of the Data Form entries at once.
5. Select **Export** at the bottom of the window.
6. The selected Data Forms are exported and saved as a *.gsuv* file.



Data Forms provided by Gallery Systems cannot be exported. If system Data Forms are selected when exported, they are automatically filtered out, and only the non-system Data Forms will export.

# System Batch Import

Batch Import will import a set of Data Forms (Data Entry Views) into the application. The set is imported from a gsuv file that is provided with the installation.

1. In Composer, select Manage Authorities > System Batch Import. File Explorer opens.
2. In File Explorer, select the gsuv file supplied with the installation. It will be in the folder System Views/Data Entry Views.
3. Select the .gsuv file for the product. For Collections, it is Collections.gsuv.
4. Select **Import**.
5. When complete, the message "All data entry views have been successfully imported."

If there are any issues, contact your System Administrator.

# Designing Data Forms (Data Entry Views)

After a Data Form (Data Entry View) has been created, Feature and Design Element widgets need to be added to the form. Feature widgets are fields and features in the TMS database that can be added to Data Forms and configured to be used in a preferred way. Design Element widgets are used to format how Feature widgets display on Data Forms.

## Accessing the Design Window

1. In the main TMS Composer window, use the **Module** pull-down list to select a module.
2. Use the **View Contexts** pull-down to select a context within the selected module.
3. Once selected, the Data Forms available for the module and context display in the Data Entry Views grid below.
4. Select a Data Form entry, and select **Edit** in the top right above the grid, the Design window opens.



Each TMS Suite application has its own set of Data Forms. The application selected when logging into TMS Composer controls which Data Forms are available for configuration.

## Design Window Elements

The Design window is divided into three panes, **Available Widgets**, **Data Entry View**, and **Widget Options**.

### Available Widgets Pane

The Available Widgets pane displays all of the Feature and Design Element widgets that can be added to a Data Form. The available Feature widgets are controlled by the module and context to which the Data Form is assigned.

At the top of the Available Widgets pane, the **Search** field can be used to quickly find a Feature widget in the Widget Models list below.

The Design Element widgets, **Add Anchor**, **Add Layout Count**, and **Add Line** display below the **Add** button, above the Widget Models list. Refer to the [Design Element Widgets](#) section for more information about using and configuring Design Element widgets.

The Widget Models list displays the Feature widgets that may be added to a Data Form in the module and context to which a Data Form is assigned.

### Data Entry View Pane

The Data Entry View pane in the middle of the Design window displays the widgets selected to be included in a Data Form. The Composition Items list in the pane displays the selected widgets in the order in which they display on the Data Form.

### Widget Options Pane

The Widget Options pane displays configuration options for a widget selected in the Composition Items list on the left. Refer to the [Configuring Standard Feature Widgets](#) section for information about configuration options available for Feature widgets that are used throughout the TMS Suite applications.

## Adding a Widget

### Feature Widgets

1. Select a Feature widget from the Widget Models list in the Available Widgets pane.
2. Select **Add**, the widget now displays at the bottom of the Composition Items list on the right.

Most Feature widgets can only be added to a Data Form once, but several Feature widgets, such as **Data View**, **Flex Field**, and **Static Text or Holding Place** can be added multiple times. Widgets that cannot be added multiple times display in gray italics in the Widgets Models list after being added to the Composition Items list on the right.

### Design Element Widgets

1. Select a Design Element widget from above the Widget Models list on the left, the Design Element widget is added to the bottom of the Composition Items list on the right.

### Ordering Widgets

The order in which widgets display in the Composition Items list in the Data Entry View pane control how they display in TMS Suite applications.

To update the order of widgets:

1. Select a widget in the list.
2. Use **Up** and **Down** arrows in the top right corner above the list to move the widget's order.

## Removing a Widget

1. Select a widget in the Composition Items list.
2. Select **Delete**  in the top right corner above the list.
3. The widget is removed from the Composition Items list. If a Feature widget that can only be added once is removed, it is available again the Widget Models list on the left.



Removing Feature widgets related to TMS fields does not delete fields or data contained in fields. The field is only removed from displaying in a Data Form. Fields and field values remain in the TMS database.

## Configuring Widget Properties

1. Select a widget in the Composition Items list in the Data Entry View pane.
2. The Widget Options pane on the right displays the customizable properties for the selected widget.
3. Refer to the [Design Element Widgets](#) and [Configuring Standard Feature Widgets](#) sections for information on configuring widget properties.

## Saving a Data Form

1. After adding widgets to the Composition Items pane and configuring the properties, select **Save** at the bottom of the Data Entry View pane.
2. If there are errors with the properties configuration of a widget, a prompt will open stating that the save failed. The widgets containing properties configuration errors display in the Composition Items list with a red border.
3. Update the properties configuration for the widgets with errors and select **Save** again.
4. After saving a Data Form, select **Home** to return to the main TMS Composer window.

## Reverting a Data Form

At any time before saving a Data Form, the **Revert** button at the bottom of the Data Entry View pane can be clicked to reset the Data Form to its last save state.

# Configuring Standard Feature Widgets

Several Feature widgets are available in multiple contexts in TMS Suite applications, such as **Attributes**, **Data Views**, **Flex Fields**, **MediaXRefs**, and **Text Entries**. The properties for configuring these widgets is the same across all modules and contexts.

## Alternate Numbers Widget

The *Alternate Numbers* widget allows users to view and enter Alternate Number entries in Objects, Constituents, Bibliography, and Sites module records.

| Alternate Number Widget Properties | Description  | Entry Method |
|------------------------------------|--|--------------|
| Alternate Numbers Hierarchy Id     | Displays the hierarchy number related to the module and context where an Alternate Number widget is available.   | Read Only    |
| Number of rows to display          | Controls how much vertical space is given to the widget to show multiple entries. Use 0 to have the vertical space adjusted by the number of Alternate Number entries available on a record. | Numeric      |
| Table                              | Displays the table ID where Alternate Number entries are stored.   | Read Only    |

## AnnotationID (Primary Media Thumbnail) Widget

The *AnnotationID (Primary Media Thumbnail)* widget displays a media thumbnail for the primary Media record linked to an Object or Conservation Report record. The *AnnotationID (Primary Media Thumbnail)* widget is also available in Media-module records.

Below the media thumbnail an **Edit** button opens a window where an Annotation record can be created or edited. The **Zoom** button opens the Quick Zoom window where a larger preview image can be viewed.

The *AnnotationID (Primary Media Thumbnail)* widget has no configurable properties.

## Attributes Widget

The *Attributes* widget displays Attribute entries for a record on a Data Form. In some contexts the *Attributes* widget is referred to as the *Thesaurus Cross References (ThesXRefs)* widget.

| Attribute Widget Properties  | Description   | Entry Method     |
|------------------------------|---|------------------|
| Include Path                 | Controls whether paths to Attribute entries display in an <i>Attributes</i> widget.   | Checkbox         |
| Position Path before Remarks | Controls whether the <i>Path</i> field is positioned before the <i>Remarks</i> field for each Attribute entry in an <i>Attributes</i> widget.<br><b>Note:</b> <i>Include Paths</i> and <i>Include Remarks</i> options must be enabled to use this property. | Checkbox         |
| Include Remarks              | Controls whether to include a free text <i>Remarks</i> field for each Attribute entry in an <i>Attributes</i> widget.   | Checkbox         |
| Include Certainty            | Controls whether to include a <i>Certainty</i> authority controlled pull-down list for each Attribute entry in an <i>Attributes</i> widget.   | Checkbox         |
| TheXref Types to Display     | Used to select thesaurus cross reference types to include in an <i>Attributes</i> widget. Each selected cross reference type displays as a selectable entry in an <i>Attributes</i> widget.   | Select from list |

## Constituent Cross References (ConXRefs) Widget

The *Constituent Cross References (ConXRefs)* widget is used to manage constituents linked to other records in TMS. The *Role* and *Display Name* fields display on the widget, and the *Active*, *Display Bio*, and *Displayed* fields can be configured to display or be hidden.

Each *Constituent Cross References* widget has a designated role type. Some *Constituent Cross References* widgets are directly related to module records, while others have specific role types, such as Acquisition Related, Rights Related, or Ex-Collections related.

| Constituent Cross References Widget Properties | Description   | Entry Method   |
|--|---|----------------|
| Active Display Order                           | Controls the position of the <i>Active</i> checkbox field in a <i>Constituent Cross References</i> widget. Select -1 to hide the <i>Active</i> checkbox field.                          | Pull-down list |
| Default Row Count                              | Controls how much vertical space is given to the widget to show multiple linked constituents. Use 0 to have the vertical space adjusted by the number of linked constituents available. | Numeric        |

|                           |  |                |
|---------------------------|--|----------------|
| Display Bio Display Order | Controls the position of the <i>Display Bio</i> pull-down list in a <i>Constituent Cross References</i> widget. Select -1 to hide the <i>Display Bio</i> pull-down list in the <i>Constituent Cross References</i> widget. | Pull-down list |
| Displayed Display Order   | Controls the position of the <i>Displayed</i> checkbox field in a <i>Constituent Cross References</i> widget. Select -1 to hide the <i>Displayed</i> checkbox field in the <i>Constituent Cross References</i> widget.     | Pull-down list |
| Role Type ID              | The Role Type ID related to the module and context where role types are available in a <i>Constituent Cross References</i> widget.   | Read Only      |

## Crystal Report Button Widget

The *Crystal Report Button* widget allows users to generate a Crystal Report from a Data Form. One Crystal Report is assigned to each *Crystal Report Button* widget. Multiple *Crystal Report Button* widgets may be added to a Data Form to run different reports.

| Crystal Report Button Widget Properties | Description   | Entry Method   |
|---|---|----------------|
| Button Caption                          | Controls the text that displays to the left of the <i>Reports</i> icon button in a <i>Crystal Report Button</i> widget on a Data Form, such as the name or description of the assigned Crystal Report.  | Free text      |
| Report Context ID                       | The Report Context ID number related to the module and context where a <i>Crystal Report Button</i> widget can be placed.   | Read Only      |
| Report Heading                          | Sets the default report heading when a report is generated using a <i>Crystal Report Button</i> widget.   | Free text      |
| Report Name                             | Used to select a Crystal Report file that has been configured for use in the selected module and context in a TMS Suite web application.<br><b>Note:</b> Crystal Reports for web applications are configured in the Web Applications Report Maintenance window in the TMS Database Configuration Utility. | Pull-down list |
| Report File Name                        | The file name related to the report selected in the <i>Report Name</i> property. This value is automatically populated when a <i>Report Name</i> is selected.   | Read Only      |

## Data View Widget

The *Data View* widget displays a Data View on a Data Form (Data Entry View).

| Data View Widget Properties | Description  | Entry Method   |
|-----------------------------|--|----------------|
| Caption                     | Controls text that displays above a <i>Data View</i> widget when displayed on a Data Form.   | Free text      |
| Data View                   | Used to select a Data View that has been configured to use in the selected module and context.<br><b>Note:</b> Data Views for web applications must be configured as <i>Active in Web Application</i> in the List View Designer Tool to be included in the list. | Pull-down list |
| Data View Module            | The module related to where a <i>Data View</i> widget can be placed.   | Read Only      |
| Display Row Count           | Controls how much vertical space is given to the <i>Data View</i> widget. Use 0 to have the vertical space adjust accordingly to the length of the data in the Data View.  | Numeric        |

## Data View Thumbnail Composite Widget

The *Data View Thumbnail Composite* widget combines a Data View with an *AnnotationID (Primary Media Thumbnail)* widget.

| Data View Thumbnail Composite Widget Properties | Description | Entry Method |
|---|-------------|--------------|
|   |             |              |

|                               |   |   |
|-------------------------------|---|---|
| Data View                     | Used to select a Data View that has been configured to use in the selected module and context.<br><b>Note:</b> Data Views for web applications must be configured as <i>Active in Web Application</i> in the List View Designer Tool to be included in the list.  | P<br>u<br>l<br>l<br>-<br>d<br>o<br>w<br>n<br>l<br>i<br>s<br>t |
| Data View Module              | The module related to where a <i>Data View Thumbnail Composition</i> widget can be placed.  | R<br>e<br>a<br>d<br>O<br>n<br>l<br>y                          |
| Is Thumbnail leading position | Controls whether an <i>AnnotationID (Primary Media Thumbnail)</i> widget displays to the right or left of a Data View.  | C<br>h<br>e<br>c<br>k<br>b<br>o<br>x                          |
| Related Media Hierarchy ID    | Displays the hierarchy number related to the link between a record and its primary Media record.  | R<br>e<br>a<br>d<br>O<br>n<br>l<br>y                          |
| Relative Data View Height     | Controls the vertical space given to a Data View in relation to the <i>AnnotationID (Primary Media Thumbnail)</i> widget. For example, using <i>1</i> makes the Data View the same height as the <i>AnnotationID (Primary Media Thumbnail)</i> widget. Using <i>2</i> makes the Data View twice the vertical length as the <i>AnnotationID (Primary Media Thumbnail)</i> widget. Use <i>0</i> to have the vertical space adjust accordingly to the amount of data contained in the Data View. | P<br>u<br>l<br>l<br>-<br>d<br>o<br>w<br>n<br>l<br>i<br>s<br>t |
| Show Edit Button              | Controls whether the <i>Edit</i> button is available underneath the media thumbnail in the <i>AnnotationID (Primary Media Thumbnail)</i> widget.  | C<br>h<br>e<br>c<br>k<br>b<br>o<br>x                          |
| Table                         | The table related to where a <i>Data View Thumbnail Composite</i> widget can be placed.   | R<br>e<br>a<br>d<br>O<br>n<br>l<br>y                          |

## Dimensions Widget

The *Dimensions* widget allows users to view and enter authority controlled Dimensions entries.

| Dimensions Widget Properties     | Description   | Entry Method |
|----------------------------------|---|--------------|
| Include Element Dimensions Label | Controls whether the <i>Description</i> field for a Dimension Element entry displays in parenthesis after the dimension element name in a <i>Dimensions</i> widget. | Checkbox     |
| Include Secondary Unit Columns   | Controls whether the Secondary Unit column displays in a <i>Dimensions</i> widget.  | Checkbox     |

## Flex Fields Container Widget

The *Flex Fields Container* widget must be added to the Composition Items list in the TMS Composer Design window before adding ungrouped *Flex Field* widgets to a Data Form. The *Flex Fields Container* widget controls the configuration for all ungrouped *Flex Field* widgets added after it.

| Flex Fields Container Widget Properties | Description   | Entry Method             |
|---|---|--------------------------|
| Allow Field Management                  | Controls whether the <b>Copy</b> and <b>Delete</b> buttons, to create additional Flex Field entries and delete a Flex Field entry, are available in a <i>Flex Field</i> widget on a record in TMS Collections..   | Checkb<br>o<br>x         |
| Annotation Format Display Order         | Controls the position of an Annotation key entry column in a <i>Flex Field</i> widget. Select <i>0</i> to hide the Annotation Format column in the Flex Field widget.<br><b>Note:</b> The <i>Annotation Format Display Order</i> property is only used for Flex Fields that are mapped to Annotation key entries and Conservation Report Types. | Numeric                  |
| Caption                                 | Controls the text that displays above the <i>Flex Field Container</i> widget.   | Free<br>t<br>e<br>x<br>t |

|                                |   |          |
|--------------------------------|---|----------|
| Display Column Headings        | Controls whether column headings display above the Flex Field entries.  | Checkbox |
| Date Column Order              | Controls the position of a Date column in <i>Flex Field</i> widgets. Select 0 to hide the Date column.  | Numeric  |
| Location Column Order          | Controls the position of a Location column in <i>Flex Field</i> widgets. Select 0 to hide the Location column.                                      | Numeric  |
| Remarks Column Order           | Controls the position of a Remarks column in <i>Flex Field</i> widgets. Select 0 to hide the Remarks column.  | Numeric  |
| Flex Field Value Display Order | Controls the position of a Flex Field value column in <i>Flex Field</i> widgets. The position is set to 1 by default. This column cannot be hidden. | Numeric  |

## Flex Field Widget

*Flex Field* widgets are used to display ungrouped Flex Fields on a Data Form. The *Flex Field Container* widget must be added to the Composition Items list in the TMS Composer Design window before adding a *Flex Field* widget to a Data Form.

| Flex Field Widget Properties | Description   | Entry Method   |
|------------------------------|---|----------------|
| Flex Field Context           | The module or context related to where a <i>Flex Field</i> widget can be placed.          | Read Only      |
| Flex Field                   | Used to select a Flex Field that has been configured for the selected module and context. | Pull-down list |

## Flex Field Group Widget

The *Flex Field Group* widget is used to add a Flex Field Group to a Data Form. Unlike the *Flex Field* widget for ungrouped Flex Fields, the *Flex Field Group* widget does not require that the *Flex Field Container* widget be added to the Composition Item list in the TMS Composer Design window.

| Flex Field Group Widget        | Description  | Entry Method   |
|--------------------------------|--|----------------|
| Display Column Headings        | Controls whether column headings display above the Flex Field Group on a Data Form.  | Checkbox       |
| Flex Field Context             | The module related to where a <i>Flex Field Group</i> widget can be placed.  | Read Only      |
| Date Column Order              | Controls the position of a Date column in a <i>Flex Field Group</i> widget. Use 0 to hide the Date column.   | Numeric        |
| Flex Field Group Id            | Used to select a Flex Field Group that has been configured for the selected module and context.  | Pull-down list |
| Location Column Order          | Controls the position of a Location column in a <i>Flex Field Group</i> widget. Use 0 to hide the Location column.   | Numeric        |
| Remarks Column Order           | Controls the position of a Remarks column in a <i>Flex Field Group</i> widget. Use 0 to hide the Remarks column.   | Numeric        |
| Flex Field Value Display Order | Controls the position of a Flex Field value column in a <i>Flex Field Group</i> widget. The position is set to 1 by default. This column cannot be hidden. | Numeric        |

## Geography Cross References (Geography XRefs) Widget

The *Geography Cross References (Geography XRefs)* widget displays authority controlled Geography Cross Reference entries for a record on a Data Form.

| Geography Cross References Widget Properties | Description  | Entry Method |
|--|--|--------------|
| Include Path                                 | Controls whether paths to Geography Cross Reference entries display in a <i>Geography Cross References</i> widget.   | Checkbox     |
| Position Path before Remarks                 | Controls whether the <i>Path</i> field is positioned before the <i>Remarks</i> field for each Geography Cross Reference entry in a <i>Geography Cross References</i> widget.<br><b>Note:</b> <i>Include Paths</i> and <i>Include Remarks</i> options must be enabled to use this property. | Checkbox     |
| Include Remarks                              | Controls whether to include a free text <i>Remarks</i> field for each Geography Cross Reference entry in a <i>Geography Cross References</i> widget.   | Checkbox     |
| Include Certainty                            | Controls whether to include a <i>Certainty</i> authority controlled pull-down list for each Geography Cross Reference entry in a <i>Geography Cross References</i> widget.   | Checkbox     |

|                           |   |                  |
|---------------------------|---|------------------|
| ThesXref Types to Display | Used to select thesaurus cross reference types to include in a <i>Geography Cross References</i> widget. Each selected cross reference type displays as a selectable entry in a <i>Geography Cross References</i> widget. | Select from list |
|---------------------------|---|------------------|

## Imported Data Entry View (Data Form) Widget

The *Imported Data Entry View* widget allows a Data Form from one module or context to display in a different context when a linked record is selected.

For example, the *Imported Data Entry View* widget can be added to an Objects-module Data Form in the *MediaXRefs Pop-Up (Objects Module)* context. From an Objects-module record Data Form, selecting **Edit** below a linked Media record in a *Media Cross References (MediaXRefs)* widget opens a window that displays the Data Form configured in the Media module's *Media Record in MediaXRefs Pop-Up (for Imported View)* context.



If more than one Data Form is available in a context for imported view, the first Data Form entry that displays in Data Entry Views grid on the main TMS Composer window is used.

Additional widgets may also be added to a Data Form along with an *Imported Data Entry View* widget.

| Imported Data Entry View Widget Properties | Description   | Entry Method |
|--|---|--------------|
| Context Imported From                      | The context ID for the Data Form used when importing a Data Form from one module or context into another. | Read Only    |

## Media Cross References (MediaXRefs) Widget

The *Media Cross References (MediaXRefs)* widget displays media thumbnails for Media records linked to another module record.

The **Edit** button below each media thumbnail in the *Media Cross References* widget opens the Edit Media Records window. In the window, media cross reference information can be viewed and edited, a larger preview image can be zoomed, and the Annotation Tool can be accessed.

If an *Imported Data Entry View* widget has been configured for the Edit Media Records window context, Media record data may be viewed and edited as well.

The *Media Cross References* widget can be formatted in two ways, as a horizontal ribbon with minimal Media record information, or as a vertical grid that displays Media record and media cross reference field columns.

| Media Cross Reference Widget Properties (horizontal) | Description   | Entry Method   |
|--|---|----------------|
| MediaXRef  | Formats the <i>Media Cross References</i> widget as a horizontal ribbon displaying media thumbnails for linked Media records.   | Pull-down list |
| Default Department                                   | The default Media department selected when a user creates new Media records from a <i>Media Cross References</i> widget.  | Pull-down list |
| Default Grid Row Count                               | The number of grid rows to display if the widget is changed to grid-style. This setting is only applicable if there are more than 50 linked records and the option to switch from ribbon to grid-style becomes available.                                 | Numeric        |
| Display Media View                                   | Controls whether a media view type displays below media thumbnails in a <i>Media Cross References</i> widget. The value displayed is pulled from the <i>Media View Type</i> authority controlled, pull-down field in Media records.                       | Checkbox       |
| Display Rendition Number                             | Controls whether Media Rendition Numbers for each linked Media record display below the media thumbnails in a <i>Media Cross References</i> widget.   | Checkbox       |
| Media Context  | The Media context as related to the table being cross referenced.   | Read Only      |
| Image Size   | Controls the size of the media thumbnails in the <i>Media Cross References</i> widget. Select <i>asList</i> for a small thumbnail, <i>asImage</i> for a medium thumbnail, or <i>asItem</i> for a large thumbnail. By default, <i>asImage</i> is selected. | Pull-down list |
| Table  | The related table to which a <i>Media Cross References</i> widget is referencing.   | Read Only      |

| Media Cross Reference Grid Widget Properties (vertical) | Description | Entry Method |
|---|-------------|--------------|
|---|-------------|--------------|

|                    |  |                |
|--------------------|--|----------------|
| MediaXRef Grid     | Formats the <i>Media Cross References</i> widget as a grid where each row displays linked Media records and media related fields.  | Pull-down list |
| Default Department | The default Media department selected when users create Media records from a <i>Media Cross References Grid</i> widget.  | Pull-down list |
| Default Row Count  | The minimum number of grid rows that will display even if there is no data.  | Numeric        |
| Media Context      | The Media context as related to the table being cross referenced.  | Read Only      |
| Image Size         | Controls the size of the media thumbnails in the <i>Media Cross References Grid</i> widget. Select <i>asList</i> for a small thumbnail, <i>asImage</i> for a medium thumbnail, or <i>asItem</i> for a large thumbnail. By default, <i>asImage</i> is selected. | Pull-down list |
| Table              | The related table to which a <i>Media Cross References Grid</i> widget is referencing.   | Read Only      |

## Object Titles Widget

The *Object Titles* widget is used to record object titles, and can be used to add additional information about a title, add more title entries, and control how the title entries are displayed. Adding additional title entries may be useful for recording an original language title, a descriptive title, or a former title, as a few examples.

| Object Titles Widget Properties | Description  | Entry Method   |
|---------------------------------|--|----------------|
| Audit Trailed                   | Indicates if a field is included in the audit trail. <i>True</i> means yes, <i>False</i> means no.   | Read Only      |
| Display All Titles              | Select to display Object titles have been entered for the Object in the Exhibitions module. <b>Need to confirm.</b>  | Checkbox       |
| Language Display Order          | Controls the position of a Language column in an Object Titles widget. Use <i>-1</i> to hide the Language column.  | Pull-down list |
| Row Count                       | Controls how much vertical space is given to the <i>Object Titles</i> widget on a Data Form. Entering <i>0</i> will allow the grid to expand to display each title. If no titles are entered, no rows will display. Entering any other number will fix the grid at the selected row height. For example, entering <i>3</i> will fix the grid at three rows, even if only one title is entered. If more than three titles are entered, a scroll bar will allow the user to scroll down to view additional titles. | Numeric        |
| Title Type Display Order        | Controls the position of a Title Type column in an Object Titles widget. Use <i>-1</i> to hide the Title Type column.  | Pull-down list |

## Public Access (Checkbox-Binary Choice) Widget

The *Public Access (Checkbox-Binary Choice)* widget is used to control which records may be used on an institution's website. In the Exhibitions and Sites modules, the widget is referred to as *Public Information (Checkbox-Binary Choice) – Checkbox*.

| Public Access (Checkbox-Binary Choice) Widget Properties | Description | Entry Method |
|--|-------------|--------------|
|--|-------------|--------------|

|                  |  |                |
|------------------|--|----------------|
| Audit Trailed    | Indicates if a field is included in the audit trail. <i>True</i> means yes, <i>False</i> means no. | Read Only      |
| Caption Position | Controls whether <i>Public Access</i> is positioned before or after the checkbox on a Data Form.   | Pull-down list |

## Single Value Text Entry Widget

The *Single Value Text Entry* widget allows one Text Entry from an assigned Text Type to be entered for a record on a Data Form. This allows users to easily create free text fields to use in TMS Suite applications, while the structure for storing the entries in the TMS database parallels with standard Text Entries. Single Value Text Entries may be styled and formatted using the options available in the *Single Value Text Entry* widget.

| Single Value Text Entry Widget Properties | Description  | Entry Method   |
|---|--|----------------|
| Caption                                   | Text that displays above the <i>Single Value Text Entry</i> widget on a Data Form.   | Free text      |
| Default Purpose                           | A default purpose for a Single Value Text Entry.   | Free text      |
| Default Status                            | A default status assigned to a Single Value Text Entry, such as Approved, Current, or Completed.   | Pull-down list |
| Expansion Row Count                       | Controls how much vertical space is given to the <i>Single Value Text Entry</i> widget on a Data Form when the <i>Expand</i> button is clicked in the top right corner. The default value is 10.<br><b>Note:</b> The <i>Show Editor Buttons</i> property must be enabled to access the <i>Expand</i> button. | Numeric        |
| Initial Row Count                         | Controls how much vertical space is initially given to the <i>Single Value Text Entry</i> widget on a Data Form before clicking the <i>Expand</i> button. The default value is 3.  | Numeric        |
| Default Author to Current User            | Controls whether the user entering a Single Value Text Entry is assigned as the author.  | Checkbox       |
| Show Editor Buttons                       | Controls whether the style, formatting, and expansion buttons display in the top right corner above the <i>Single Value Text Entry</i> widget on a Data Form.  | Checkbox       |
| Text Type                                 | The text type to which a <i>Single Value Text Entry</i> widget is assigned.<br><b>Note:</b> Only Text Types configured as <i>Web Application Field</i> in the Text Entries Authority are available.  | Pull-down list |

## Static Text or Holding Place Widget

The *Static Text or Holding Place* widget can be used to add static, non-editable text to a Data Form, or to create a blank holding place. If static text is used, it may be formatted with HTML tags, such as `<b></b>` to make the text bold.

When a *Static Text or Holding Place* widget is used as a holding place, blank space is created on the Data Form either horizontally or vertically. For example, an *Add Layout Count* Design Element widget is added to the Composition Items list in the TMS Composer Design window and configured to display three fields across horizontally. Then, two Feature widgets are added underneath, and a *Static Text or Holding Place* widget is placed between them. On a Data Form, the two Feature widgets will display on the left and right sides of the Data Form with a blank, holding place between them. Similarly, if a layout count is not set for a Data Form, or if it is set at 1, adding a *Static Text or Holding Place* widget between Feature widgets creates vertical space between them on a Data Form.

| Static Text or Holding Place Widget Properties | Description  | Entry Method   |
|--|--|----------------|
| Format   | Controls whether the static text is plain text or formatted with HTML tags, such as <code>&lt;b&gt;&lt;/b&gt;</code> to display bold text. | Pull-down list |
| Row Count                                      | Controls how much vertical space is given to the widget.   | Numeric        |

## Statuses Widget

The *Statuses* widget displays thesaurus controlled Status entries for a record on a Data Form.

| Statuses Widget Properties   | Description   | Entry Method |
|------------------------------|---|--------------|
| Include Path                 | Controls whether paths to Status entries display in a <i>Statuses</i> widget.   | Checkbox     |
| Position Path before Remarks | Controls whether the <i>Path</i> field is positioned before the <i>Remarks</i> field in a <i>Statuses</i> widget.<br><b>Note:</b> <i>Include Paths</i> and <i>Include Remarks</i> options must be enabled to use this property. | Checkbox     |

|                           |   |                  |
|---------------------------|---|------------------|
| Include Remarks           | Controls whether to include a free text <i>Remarks</i> field for Status entries in a <i>Statuses</i> widget.  | Checkbox         |
| Include Certainty         | Controls whether to include a <i>Certainty</i> authority controlled pull-down list for Status entries in a <i>Statuses</i> widget.                        | Checkbox         |
| ThesXref Types to Display | Used to select thesaurus cross reference types to include in a <i>Statuses</i> widget. Each selected cross reference type displays as a selectable entry. | Select from list |

## Status Flags Widget

The *Status Flags* widget allows users to view and add general and/or conservation related Status Flags to records in a Data Form.

| Status Flag Widget Properties | Description  | Entry Method   |
|-------------------------------|--|----------------|
| Display Filter                | Controls whether general and/or conservation related Status Flags display in a <i>Status Flags</i> widget. Select <i>Both</i> to display both types. | Pull-down list |

## Text Entries Widget

The *Text Entries* widget displays Text Entries for a record on a Data Form in a grid. Unlike the *Single Value Text Entry* widget, multiple Text Entries may be added to a *Text Entries* widget and multiple Text Types can be configured.

| Text Entries Widget Properties | Description  | Entry Method     |
|--------------------------------|--|------------------|
| Caption                        | Text that displays above the <i>Text Entries</i> widget on a Data Form.  | Free text        |
| Content Translation Allows     |  |                  |
| Display Rows per Text Entry    | Controls how much vertical space is given to each Text Entry in the <i>Text Entries</i> widget.  | Numeric          |
| Table                          | The related table to which a <i>Text Entries</i> widget is added.  | Read Only        |
| Text Types to Display          | Used to select the types of Text Entries to display in a <i>Text Entries</i> widget.<br><b>Note:</b> Only Text Types configured as <i>Standard Text Entry</i> in the Text Entries Authority are available. | Select from list |

# Design Element Widgets

**Design Element widgets** are used to format how Feature widgets display on [Data Forms \(Data Entry Views\)](#). Three Design Element widgets are available in the Design window in TMS Composer, **Add Anchor**, **Add Layout Count**, and **Add Line**.

After adding a Design Element widget to a Data Form it must be configured. When a Design Element widget is selected in the Composition Items list, the properties available for configuring the widget display in the Widget Options pane on the right. For information on adding widgets to Data Forms, refer to the [Designing Data Forms \(Data Entry Views\)](#) section.

## Add Anchor

The *Add Anchor* widget is used to group Feature widgets together under a container with a heading. In TMS Suite applications, anchor headings also display under the selected Data Form in the Available Data Entry Views pane in the lower left corner. Clicking on an anchor heading from the Available Data Entry Views pane navigates the Data Form to the selected anchor.

Multiple *Add Anchor* widgets may be added to a Data Form.

| Add Anchor Widget Properties | Description  | Entry Method   |
|------------------------------|--|----------------|
| Anchor Label                 | A label that displays in the anchor header on a Data Form. The anchor label also displays under the selected Data Form in the Available Data Entry Views pane in the lower left corner.  | Free text      |
| Default Configuration        | Controls whether an anchor and the fields included are closed or opened by default. The <i>Permanently Open</i> options prevents an anchor and included field widgets from being closed. | Pull-down list |
| Layout Column Count          | Not in use.  | Numeric        |

## Add Layout Count

The *Add Layout Count* widget controls the number of Feature widgets that display in a horizontal row. This is helpful for grouping related widgets on a Data Form in a meaningful way. The *Add Layout Count* widget may be used inside or outside of *Add Anchor* widgets.

 Multiple *Add Layout Count* widgets may be added to a Data Form.

The *Add Layout Count* widget cannot be used to put multiple *Add Anchor* widgets on the same horizontal row.

| Add Layout Count Widget Properties | Description   | Entry Method |
|------------------------------------|---|--------------|
| Column Count                       | Controls the number of field widgets that display in a horizontal row.<br><div data-bbox="365 1360 1393 1451"><p> Five is the maximum number of widgets that can be included in a horizontal row. Using a value greater than five will revert the layout count to one Feature widget per horizontal row.</p></div> | Numeric      |
| Frozen                             | Not in use.   | Checkbox     |

## Add Line

The *Add Line* widget is used to create a horizontal line across a Data Form and serves as a way to clear formatting from *Add Anchor* and *Add Layout Count* Design Element widgets in the Composition Items list.

For example, if an *Add Line* widget is added to a Data Form underneath an *Add Anchor* widget, the Feature widgets after the *Add Line* widget display outside of the anchor. Similarly, if an *Add Line* widget is added underneath an *Add Layout Count* widget, the Feature widgets after the *Add Line* widget display one Feature widget per horizontal row.

Multiple *Add Line* widgets may be added to a Data Form.

After adding an *Add Line* widget, the *Add Anchor* and *Add Layout Count* widgets can be added again to add additional anchors and horizontal row counts.

The *Add Line* widget has no configuration options.



# Manage Authorities and Other Features

The following authorities and feature settings can be set in Composer:

[Data Indexing](#)

[Manage GS Identifiers](#)

[Manage Thesaurus Cross-Reference Types](#)

[Media Path Administration](#)

[Convert FTS Queries](#)

[Annotation Key Formats](#)

# Data Indexing

TMS Suite applications are run by an Apache Solr database that is synchronized with the TMS SQL database. The Solr database reads data from and writes data to the TMS SQL database to keep the information in both databases current.

When a TMS Suite application is first installed, or after changes have been made to search options in a Query Group configured for Solr indexing, the Solr database has to be indexed.

## Accessing Data Indexing

1. In the main TMS Composer window, select the **Data Indexing** button at the bottom of the window, the Data Indexing window opens.
2. The Indexed Modules grid displays a row for each module in the TMS Suite applications.

## Data Indexing Window Elements

Each module row in the grid represents one Solr core. By having a Solr core for each module, each module's data can be indexed independently of the others.

The Status column displays whether each module core is active, and whether the monitoring and indexing functions are enabled. The value in the Monitoring Interval (sec) column is based on the value set in the *Solr.Core.Config* configuration setting in the TMS Database Configuration Utility.

The buttons above the Indexed Modules grid are used to change the state of a selected module entry in the grid, or all modules at once.

| Data Indexing Buttons  | Description  |
|------------------------|--|
| Start Full Re-indexing | Fully re-indexes record data in all modules, or only the module selected in the grid.  |
| Stop Full Re-indexing  | Stops a full re-indexing after a Full Re-indexing has been initiated.  |
| Activate               | Activates all module, or just the module selected in the grid.   |
| Deactivate             | Deactivates all module, or just the module selected in the grid.   |
| Enable Monitoring      | Enables monitoring for all module, or just the module selected in the grid. Monitoring watches the module cores for troubleshooting in the Solr Administration console.  |
| Disable Monitoring     | Disables monitoring for all module, or just the core selected in the grid.   |
| Enable Indexing        | Enables indexing for all module cores, or just the module selected in the grid. Indexing allows the Solr database to synchronize with the TMS SQL database.<br><b>Note:</b> Indexing must be enabled before starting a Full Re-indexing job. |
| Disable Indexing       | Disables indexing for all modules, or just the module selected in the grid.  |

## Full Module Re-indexing

1. Select a module entry and click the **Start Full Re-indexing** button.
2. To index just the selected module, choose the **Current** option. To re-index all modules, select **All**.
3. After initiating a full re-index, a number displays in parenthesis after the module names in the grid. This number represents the number of records that have been indexed for each module and continually updates while indexing. Once a full re-index is complete, the number will no longer display after the module name.



Modules must be active and **Enable Indexing** must be set before starting a full re-index. Modules can be re-indexed without interrupting service to the TMS Suite applications. While a re-index is occurring, the TMS Suite applications use the last index that was created before the re-indexing began. After a re-index is complete, the TMS Suite application services must be restarted to reflect the re-indexed data.

## Updated Query Groups

If fields are added or removed from Query Groups that are configured for Solr indexing in the [TMS Suite Application Configuration Utility](#), the corresponding module must be re-indexed for the field data to be populated in the Solr database. Refer to the [Query Groups](#) section for information on adding fields to Query Groups to be included in TMS Suite applications.

# Manage GS Identifiers

*Content for this page will be provided in a future release.*

# Managing Thesaurus Cross Reference Types

Thesaurus related fields such as the *Attributes*, *Geography Cross References*, and *Statuses* can be configured with **Thesaurus Cross Reference Types**. Thesaurus cross reference types give context to thesaurus term entries linked from the Thesaurus Manager to records in TMS Suite applications, and can be configured with thesaurus access points. A thesaurus access point opens the Thesaurus Manager to a specific concept in a concept scheme when creating a new thesaurus field entry using a selected thesaurus cross reference type.

For example, an *Attribute* field with a thesaurus cross reference type, *Historical Period*, may have a thesaurus access point that opens the Thesaurus Manager to concepts about different periods in history. From there, a historical period can be selected for the Attribute entry.



Thesaurus cross reference types are specific to each module or context. For example, thesaurus cross reference types configured for the *Attributes* field in the Objects module are not available for the *Attributes* field in the Constituents module.

## Viewing Thesaurus Cross Reference Types

1. From the main TMS Composer window, select **Manage Thesaurus XRef Types** at the bottom of the window, the Manage Thesaurus XRef Types window opens.
2. Use the **Select Type** pull-down list to select one of the thesaurus related fields, *Attributes*, *Geography Cross References*, or *Statuses*.
3. Use the **Select Table** pull-down list to select a module or context.
4. Thesaurus cross reference types configured for the field type and module/context selected display in the grid below.

Clicking on a column header in the grid sorts the entries in the grid in ascending and descending order by the selected column.

| Manage Thesaurus Xref Types Grid Fields | Description  |
|---|--|
| Name                                    | A name for a thesaurus cross reference type. Displays in a thesaurus related field widget on a Data Form.  |
| Root Term                               | The thesaurus access point path to where the Thesaurus Manager opens when adding a thesaurus related field entry from a selected thesaurus cross reference type. |
| Multiple Select                         | Controls whether multiple thesaurus related field entries by the same thesaurus cross reference type may be added to TMS records.                                |
| Archive Deletes                         | Controls whether deleted thesaurus term entries are made inactive when first deleted.  |

## Adding a Thesaurus Cross Reference Type

1. Use the **Select Type** pull-down list to select a thesaurus related field.
2. Use the **Select Table** pull-down list to select the module or context where a thesaurus cross reference type should be added.
3. Select **Add**  in the top right corner above the grid, a new thesaurus cross reference type entry displays at the bottom of the grid.
4. Select the cell under the Name column and type a name for the thesaurus cross reference type.
5. In the Root Term column, select **Edit**, the Thesaurus Lookup window opens.
6. Use the Concepts Hierarchy on the left to navigate to a root concept for the thesaurus cross reference type being created. Double click on the concept, or use the **Select** button to select the concept and return to the Manage Thesaurus XRefs window. The Root Term cell populates with the path to the concept selected in the Thesaurus Lookup window.
7. If users should be allowed to add more than one thesaurus related field entry using the thesaurus cross reference type, select the checkbox in the **Multiple Select** column.
8. If thesaurus related field entries should be marked as inactive the first time they are deleted from a record, select the checkbox in the **Archive Deletes** column.
9. Select **Home** at the bottom to save the new thesaurus cross reference type.
10. After creating a thesaurus cross reference type, it must be configured to display on a Data Form. Refer to the [Configuring Standard Feature Widget](#) section for more information.

## Editing a Thesaurus Cross Reference Type

1. Use the **Select Type** pull-down list to select a thesaurus related field.
2. Use the **Select Table** pull-down list to select the module or context where a thesaurus cross reference type should be updated.
3. Select a thesaurus cross reference type entry in the grid, and update the information in the columns. If a root term should be updated, first select **Delete**  in the left of the cell to clear the original root term value, and then select **Edit** to select a new concept.

## Deleting a Thesaurus Cross Reference Type

Thesaurus cross reference types can only be deleted if they are not in use.

1. Use the **Select Type** pull-down list to select a thesaurus related field.
2. Use the **Select Table** pull-down list to select the module or context where a thesaurus cross reference type should be deleted.
3. Select **Delete**  in the top right corner above the grid.

4. A prompt opens, asking if the thesaurus cross reference type should be deleted. Select **Yes**.
5. If the thesaurus cross reference type is currently in use, a second prompt will open, stating that it cannot be deleted.
6. Navigate to the records where thesaurus related field entries are using this thesaurus cross reference type and remove them. The thesaurus cross reference type can now be deleted.

# Media Path Administration

Network paths containing media files linked to TMS records must be configured in order to be recognized by TMS Suite applications. Once configured, these paths are available in the applications for copying media files to configured media paths, or linking media files to new Media records. Additionally, HTTP addresses may be added as paths, allowing Media records to be created from websites or media files that live on a website or server.

## Accessing Media Path Administration

1. In the main TMS Composer window, select **Media Path Administration** at the bottom, the Media Path Administration window opens.

The Media Path Administration window displays a grid with each row being a configured media path entry

Underneath the grid, options are available to validate processed files, and batch process media paths. Refer to the [Media Path Configuration Options](#) section for additional information.

| Media Path Administration Grid Fields | Description  |
|---------------------------------------|--|
| Path                                  | A value for a path that displays in TMS Suite applications.<br><b>Note:</b> Typically, this value should match the value entered in the <i>Physical Path</i> field to ensure proper functionality.   |
| Physical Path                         | A value for a physical network, computer, or HTTP path.  |
| Display Sub-Folders                   | Controls whether the subfolders contained in a configured media path are available to display in the Find File in a Configured Network Folder window.<br><b>Note:</b> Subfolders do not display in the <i>Path</i> pull-down list on File Upload Options window when selecting a folder to which a media file will be copied when using drag and drop functionality. |
| Read Only                             | Controls whether a media path is only used for retrieval of media files already linked to Media records. New media files added to a read only media path are not watched, nor is the folder available for uploading media files.   |
| Offline                               | Controls whether a media path is offline. Media assets in offline paths display in TMS Suite applications but cannot be downloaded. New media paths are marked offline by default.   |
| Shared                                | Controls whether a media path is available to all users for adding and retrieving media files through TMS Suite applications. Newly added media paths are marked shared by default.  |
| In Use (# Files)                      | The number of media files in a configured media path that are linked to Media records.   |
| File System Cache                     | Displays the processing status of a media path, either Processed or Unprocessed.   |
| Last Sync Date                        | The last date that a media path was fully processed.<br><b>Note:</b> Online, non-read only processed media paths are actively scanned for changes beyond the date that a path was fully processed.   |
| Has Security                          | Controls whether a media path has user security. This box becomes selected when the <i>Shared</i> checkbox is deselected and media path security has been configured.  |
| Security                              | Opens the Manage Media Path Security window where users and/or Security Groups can be granted rights to access and/or modify a media path. Only available when the <i>Shared</i> checkbox is deselected.   |

## Adding a New Media Path

1. Select **Add**  in the top right corner above the Media Path Administration grid, a new media path entry displays at the bottom of the grid.
2. Enter values for the path in the *Path* and *Physical Path* fields.
3. Click off of the new media path entry to save the path. The number *0* displays in the In Use (# Files) column indicating that a path was added correctly.

## Processing a New Media Path

After a new media path is added it must be processed. Processing a media path reads the contents of a path and records the files and file properties in the TMS database. After a media path is processed, as long as a path is online and not marked as read only, new files added to the path will automatically be recorded in the TMS database which can be used to create new Media records.



Processing a media path does not create Media records for the files contained in the path. Rather, the files and file properties are used to display in the Find File in a Configured Network Folder window where a media file can be selected when creating a Media record.

1. Before processing a single media path, make sure the checkbox in the Offline column is deselected.
2. Select **Process (gears)** in the top right corner above the Media Path Administration grid.
3. A window opens, asking if the media path should be processed. Select **Yes**, a processing window opens with a progress bar.

After the media path is processed, the window closes. The value, *Processed* displays in the File System Cache column and the date and time that the processing completed displays in the Last Sync Date column.

Batch processing jobs may be performed to process more than one media path at once. Refer to the [Batch Processing Media Paths](#) section for more information.

## Deleting a Media Path

A media path can only be deleted if no Media records are linked to media files in the path. This can be determined quickly by looking at the value in the In Use (# of Files) column for the path. A media path can only be deleted when the value is 0.

1. Select a media path entry in the Media Path Administration grid, then select **Delete**  in the top right corner above the grid.
2. A window opens, asking if the path should be deleted. Select **Yes**. The media path entry is removed from the grid.

## Validating Processed Files

The *Validate Processed Files* function performs a scan for linked media files in media paths to ensure that all preview cache sized images have been created successfully.

1. Select **Validate Processed Files** at the bottom of the Media Path Administrator window.
2. A window opens, stating that processing files may take some time. Select **Yes** to continue, a progress bar displays in the window.

Once finished, a window opens, stating that the process is complete. If any errors are detected, the window will state that the validation is complete, but errors were found.

With the file validation finished, missing preview cache images can be generated in the Media Cache Maintenance window.

# Batch Processing Media Paths

Processing media paths reads the contents of paths and records the files and file properties in the TMS database.

The batch processing media paths functions in the Media Path Administration window allow more than one media path to be processed at once. The options available for processing are related to the configuration properties of media paths, such as online and offline.

To batch process media paths:

1. Select **Batch Process** at the bottom of the Media Path Administration window in the TMS Composer application.
2. Select one of the options, *Physical Media*, *Offline Folders*, *Online HTTP Folders*, or *Online Folders*, a window opens displaying a progress bar that updates as the processing progresses. When finished, the window closes.



Batch processing media paths may take some time. It is recommended that these functions are performed off hours.

## Batch Process Options

### Physical Media

The *Physical Media* option relates to the physical Media records stored in the TMS database, and does not involve media paths. Physical Media records are created for tangible media, such as 35mm film, color transparencies, black and white prints, or x-rays. Media records created for physical media are used to manage and track the physical media in TMS. Processing physical Media records ensures that they display correctly in TMS records with a media icon showing that no digital media preview cached image is available.

### Offline Folders

The *Offline Folders* option processes the contents of all media paths marked as *Offline*. Offline media paths are not actively monitored or watched. Processing offline media paths updates the TMS database with any changes to the offline paths since the last time they were processed.

### Online HTTP Folders

Media paths may be configured as HTTP addresses, allowing Media records to be created from websites or media files that live on a website or server. The *Online HTTP Folders* option processes all media paths using *HTTP* or *HTTPS* as the path name.

### Online Folders

The *Online Folders* option processes all media paths that are not marked as *Offline*. This is helpful when all paths need to be reprocessed rather than processing them individually.

# Media Cache Maintenance

The Media Cache Maintenance window displays linked media files included in a media path, and any errors associated with generating preview cache thumbnails for the files. Functions can be run from the window to recreate cached preview images, recreate zoom-able, tiled images, extract metadata, and recreate thumbnails for Crystal Reports and TMS for Windows.

The Media Cache Maintenance window can only be accessed for media path entries that are processed and online.

## Accessing the Media Cache Maintenance Window

The Media Cache Maintenance Window is opened from the Media Path Administration window in the TMS Composer application.

1. Select a processed, online media path entry in the Media Path Administration grid.
2. Select **Maintain Media Cache (wrench)** in the top right corner above the grid, the Media Cache Maintenance window opens.

## Querying Media Files

The window displays the Files grid which lists media files in the media path that are linked to Media records. By default, nothing is displayed.

Above the grid, the *Medium Type*, *Format*, and *Extension* pull-down list fields and the *Failed to Process Only* checkbox can be used to filter the results in the Files grid after clicking the *Find* button.

With no filters selected, clicking the *Find* button will return all media files in the path that are linked to Media records.

| Files Grid Columns | Description  |
|--------------------|--|
| File Name          | A file name for a media file.  |
| Path               | The media path where a media file is located.  |
| Status             | A status value for a media file.   |
| Rendition Number   | An identifying number for a Media rendition related to a media file.   |
| Medium Type        | The type of media file related to the media file format, such as Image, Document, or Video.  |
| Format             | The media file format type related to the medium type, such as Jpeg for Images, or Adobe Acrobat file for Documents.   |
| Failed             | Indicates if errors have occurred while processing a media file.   |
| Count              | The number of times an error has occurred when processing a media file.  |
| Errors             | A description of the error that occurred when processing a media file. <b>Note:</b> After running the <i>Validate Processed Files</i> function, media files that do not have all preview cache images created correctly will display the error, <i>Cached image file not found</i> . Running the <i>Image Cache</i> processing option in the Options pane below creates the missing cache images and the errors are removed. |

At the bottom of the window, processing options can be selected to run for the media files that have been queried in the Files grid above.

| Media Processing Options | Description   |
|--------------------------|---|
| Image Cache              | Processes the preview cache images that display in TMS Suite applications. All cache image sizes may be processed at once, or just one size can be selected for processing.       |
| Tiles                    | Processes deep zoom images for media files where the <i>Requires Tiling</i> checkbox is selected in the Media record.   |
| Metadata                 | Extracts file metadata from media files.  |
| Thumbnails               | Creates thumbnail files used in Crystal Reports and TMS for Windows.<br><b>Note:</b> Thumbnail configuration properties are configured in the TMS Database Configuration Utility. |



# Media Path Configuration Options

Several configuration options can be set for each media path entry. Configuration options for media paths are accessed from the Media Path Administration window in the TMS Composer application.

## Display Subfolders

When a media path is configured with the *Display Subfolders* checkbox selected, subfolders within the media path are displayed in the Find File in a Configured Network Folder window when selecting a file to create a new Media record. By configuring a media path to display subfolders, only one media path entry is required for the parent folder, and media path entries for each subfolder it contains are not needed.

When a media file in a subfolder is linked to a Media record, the name of the subfolder will be recorded as a prefix to the filename. For example, if *C:Media* is a media path entry configured to display subfolders, and a subfolder called *Images* is added to that path, a media file linked from the subfolder will have *C:Media* as its path value, and *Imagesfilename.jpg* as its filename value.

**Note:** Subfolders only display in the Find File in a Configured Network Folder window. They do not display in the *Path* pull-down list on File Upload Options window when selecting a folder for copying a media file when using drag and drop to create a new Media record.

## Read Only

When the *Read Only* checkbox is selected for a media path entry, the media path is only used for retrieval of media files already linked to Media records. Media files added to a read only media path from outside of TMS Suite applications are not watched, nor is the path available for uploading media files within the applications. New Media records can be created by selecting a file within a read only media path, but new files are not available to select until the media path is fully reprocessed.

A practical example for a read only media path is a legacy media path to which media files are no longer being added, but contains media files linked to Media records. When uploading new media files, by not displaying read only paths in the *Path* pull-down list, only active paths are available.

## Offline

Media records linked to files in an offline media path still display in TMS Suite applications, but related media files cannot be downloaded. Additionally, offline media paths are not actively watched, nor is the path available for uploading media files from within TMS Suite applications. By default, new media paths are marked as *Offline*. To bring a media path online, deselect the checkbox in the Offline column.

## Shared

When a media path is configured as shared, the media path can be accessed by all users in TMS Suite applications with rights for adding and/or retrieving media files from the path. By default, a new media path entry is marked as *Shared*.

## Configuring Media Path Security

Media paths can be restricted so that only certain users can add and/or retrieve media files. Refer to the [Media Path Security](#) section for more information.

# Media Path Security

Media paths can be configured so that only certain users can add and/or retrieve media files. Each media path can have its own individually configured security.

## Accessing Media Path Security

Media path security is configured in the Media Path Administration window in the TMS Composer application.

1. To add security to a media path, deselect the *Shared* checkbox in the Media Path Administration grid for a media path entry.
2. The orange **Security** button in the Security column becomes available, select it to open the Manage Media Path Security window.

## Configuring Media Path Security

Two radio buttons display in the top right corner of the window, *Right to Access*, and *Rights to Modify*.

### Rights to Modify

When *Rights to Modify* is selected, security is being set for which users and/or Security Groups have rights to copy new media files to the media path through TMS Suite applications.



When users are granted rights to modify a media path, they automatically are granted rights to access. Configuring rights to modify security first can save time when configuring right to access security.

1. Select the **Right to Modify** radio button to configure the users and/or Security Groups that should have rights to add media files to the media path. Underneath, all available users and Security Groups display in the Available Users/Security Groups list on the left.
2. Use the > button to add the selected users/Security Groups on the left to the Selected Users/Security Groups list on the right. The *Shift* and *Ctrl* keys can be used to select multiple items from the list to move at once. Additionally, the >> button can be used to move all items from the list on the left to the right.
3. If a user or Security Group needs to be removed from the Selected Users/Security Groups list, select the entries in the list to be removed and use the < or << buttons.

### Right to Access

Select the **Right to Access** radio button to configure the users and/or Security Groups that should have rights to download media files from the media path. Users and/or Security Groups with modify rights are automatically added to the Selected Users/Security Groups list.

## Media Path Security Window Display Preferences

The Manage Media Path Security window can be set to display only users, Security Groups, or both in the Available and Selected lists. By default, both users and Security Groups display in both lists.

1. Selecting the **Users** radio button in the middle of the window only displays users in both lists. Selecting the **Groups** radio button only displays Security Groups in both lists.
2. The **Preference (gears)** button displays options for saving a personal or global preference for which radio button is currently selected. Select **Save as Personal Preference** to save the preference for the current user. A TMS administrator may choose the **Save as Default Preference for all Users** so that all users see the display preference when the Media Path Security window is accessed. The **Clear Personal Preference** and **Clear Default Preference for all Users** options are used to clear saved preferences.
3. When finished configuring media path access and modifying rights, select **Close** at the bottom of the window. The box in the Has Security column is now checked in the Media Path Administration grid.



The *User* and *Group* display preferences only filter the users and Security Groups in the lists for ease of viewing and do not effect what users and/or Security Groups have been granted rights.

# Convert FTS Queries

*Content for this page will be provided in a future release.*

# Annotation Key Formats

*Content for this page will be provided in a future release.*

# Thesaurus Manager

The Thesaurus Manager is a browser-based application that runs through a browser. It is used to organize and manage structured, controlled data, such as controlled vocabularies, taxonomies, and thesauri. By linking controlled data from the Thesaurus Manager to TMS Collections records, record cataloguing is more consistent and search functionality is enhanced.

Additionally, the Thesaurus Manager allows users to create [semantic associations](#) between related data and supports [poly-hierarchies](#).

## Thesaurus Manager Terminology

It's very important to understand the relationship between the terminology used in the Thesaurus Manager and TMS Collections.

The Thesaurus Manager terminology adheres to the *Simple Knowledge Organization System (SKOS)* recommendation used to represent structured, controlled vocabularies on the semantic web.

## Thesaurus Manager Vocabulary

**Concept:** Any unit of thought that can be defined or described.

**Concept Scheme:** A grouping of concepts in a hierarchical structure, such as a controlled vocabulary, thesaurus, or taxonomy.

**Preferred Lexical Labels:** A preferred definition or description for a concept.

**Alternative Lexical Labels:** An alternative definition or description for a concept, such as a synonym, abbreviation, or alternate spelling.

In TMS Collections, linked thesaurus terms are analogous to preferred and alternative lexical labels for concepts in the Thesaurus Manager. In one TMS Collections record, a linked thesaurus term may be the preferred label for a concept, and in another record, an alternative label for the same concept may be used as a linked term. While these terms may have different characteristics, such as different spelling or language, they both reference the same concept in the Thesaurus Manager.

## Opening the Thesaurus Manager

The Thesaurus Manager can be launched in the following ways.

### Thesaurus Related Fields

When adding a term entry to the [Attributes \(ThesXRefs\)](#), [Geography References \(Geography XRefs\)](#), or [Statuses \(ThesXRefs\)](#) widgets, the Thesaurus Lookup is launched to browse for a term to select. To open the Thesaurus Manager, select the **Thesaurus Manager** button in the lower right corner of the Thesaurus Lookup window.

### Outside of TMS

The Thesaurus Manager application can be launched from outside of TMS Collections by double clicking on the Thesaurus Manager application file, or by navigating to the *The Museum System* folder in the Windows *Start* menu and selecting the Thesaurus Manager.

## Thesaurus Manager Layout

### Concepts Hierarchy

The Concepts Hierarchy on the left side of the Thesaurus Manager window displays the local and external concept schemes. By clicking the arrow to the left of a scheme, the scheme is expanded to show narrower concepts.

### Lexical Labels and Hierarchy Panes

When a concept is selected in the Concepts Hierarchy, the [Preferred Lexical Labels](#) and [Alternative Lexical Labels](#) panes on the right display the label entries for the selected concept. These labels can be selected to include as linked terms in TMS fields.

At the bottom, the Hierarchy pane displays the path from the selected concept to the broadest concept, the root, in the scheme in which it is included. If a concept is linked to multiple schemes, all [poly-hierarchies](#) where the concept is located are displayed.

### Menu Buttons

The menu buttons at the top of the Thesaurus Manager window launch different functions within the application.

**Add:** Allows a user to add a new [concept](#), [preferred label](#), or [alternative label](#).

**Copy Concept:** Allows a user to copy a concept selected in the Concepts Hierarchy to paste into another concept scheme.

**Show Related Concepts:** Displays the Related Concepts and Taxonomy panes in place of the Preferred and Alternative Lexical Labels panes. The Related Concepts Pane displays [concepts associated](#) with the one currently selected in the Concepts Hierarchy. The Taxonomy pane displays a taxonomic structure to which a [concept scheme can be mapped](#).

**Go To Root:** Navigates from a selected concept in the Concepts Hierarchy to the broadest level, the root, of the concept scheme in which it is included.

**Find Concept:** Opens the [Find Concept](#) window on the right. Used to search for concepts by label names.

**Locate Catalog Term Type:** Opens the [Catalog Term Type Selector](#) window on the right. Used to view term types configured for the [Attributes \(ThesXRefs\)](#), [Geography References \(Geography XRefs\)](#), and [Status Terms](#) thesaurus fields throughout TMS.

**Check Label Usage:** Performs a [label usage count](#) for instances where the lexical labels for a selected concept are linked in TMS Collections records.

**Manage Concept Schemes:** Allows a user to add and delete [concept schemes](#), import external concept schemes, migrate local concepts and concept associations from one scheme to another, and manage user security for each concept scheme available.

## TMS Collections Widgets that Support Thesaurus Manager Data

The Thesaurus Manager can be used to create entries in thesaurus related TMS Collections widgets, such as the [Attributes \(ThesXRefs\)](#), [Geography Cross References](#), and [Status Terms](#). The widgets can be configured to display various fields, such as the path to the term in the Thesaurus. Refer to [Configuring Standard Feature Widgets](#) for configuration options.

# Finding Concepts

The Find Concept search tool in the Thesaurus Manager allows users to search for labels (terms) for concepts to use in TMS Collections records.

For information about the relationship between the terminologies used between TMS Collections (terms) and the Thesaurus Manager (labels), refer to the [Thesaurus Manager](#) section.

## Selecting from Concepts Hierarchy

1. Use the Concepts Hierarchy to navigate to a concept and select it.
2. Double click on a label entry in either the [Preferred Lexical Labels](#) or [Alternative Lexical Labels](#) panes.



The preferred label for a concept can also be selected by double clicking on the concept in the hierarchy.

## Searching Concept Labels

1. Select **Find Concept** at the top of the Thesaurus Manager window. The Find Concept tool opens on the right.
2. Enter a search value in the *Label* field and use the options on the **Search Options** and **Path Options** tabs to configure the search. See below for an explanation of these options.
3. After entering a search value and configuring search options, select **Find Now** to the right of the *Label* search field to perform a search.

### Search Options Tab

The Search Option tab contains fields that control the concept labels returned in the search results.

| Search Options Tab Fields        | Description   | Field Entry  | Authority Controlled? |
|----------------------------------|---|--------------|-----------------------|
| equals                           | Used to specify that a search result for a concept label must be an exact match of the search value in the <i>Label</i> field.  | Radio button | No                    |
| starts with                      | Used to specify that a search result for a concept label must start with the search value in the <i>Label</i> field, but may include additional information after the value.  | Radio button | No                    |
| contains                         | Used to specify that a search value can be in any part of a search result for a concept label. For example, searching <i>science</i> using the <i>contains</i> operator returns <i>social sciences</i> , <i>science fiction</i> , and <i>science, political</i> . | Radio button | No                    |
| Include Guide Concepts in Search | Controls whether guide concepts are included in concept label search results. Guide concepts are surrounded by <i>Less Than</i> and <i>Greater Than</i> characters and are used to guide users to narrower concepts in a concept scheme.                          | Checkbox     | No                    |
| Within Selected Branch Only      | Controls whether to search only for narrower concepts within a selected concept scheme hierarchy, or concept level.   | Checkbox     | No                    |

### Path Options Pane

The Path Options pane contains fields related to how the Path column is formatted for concept label entries in the Search Results pane.

| Path Options Pane Fields       | Description   | Field Entry    | Authority Controlled? |
|--------------------------------|---|----------------|-----------------------|
| Depth                          | The number of hierarchy levels to display in the Path column, starting with the level closest to the concept label searched, by default. Select <i>Full Path</i> to see all path levels to the concept from the root of the concept scheme. | Text pull-down | Yes                   |
| Include Guide Concepts in Path | Controls whether to include guide term concepts in the Path column. Guide terms are surrounded by <i>Less Than</i> and <i>Greater Than</i> characters and are used to guide users to narrower concepts in a concept scheme.                 | Checkbox       | No                    |
| Broadest Concept First         | Controls whether to display the root of a concept scheme first in the Path column, followed by narrower concepts and ending with the searched concept label.  | Checkbox       | No                    |

## Viewing Search Results

The Search Results pane displays concept label entries returned from the search in a grid.

| Search Results Grid | Description  |
|---------------------|--|
| Label               | A preferred or alternative lexical label for a concept.                      |
| Label Type          | The context for a concept label, such as synonym, descriptor, or index term. |

|                |   |
|----------------|---|
| Concept Scheme | The concept scheme where a concept label is located, such as AAT or TGN.  |
| Path           | The hierarchical path from the concept label to the root of the concept scheme. The options selected on the Path Options tab control how this field is formatted. |

## Locating a Search Result

1. Select a concept label entry in the Search Results pane and select **Locate Concept**.
2. The Concepts Hierarchy navigates to the selected concept on the left, and the [Preferred Lexical Labels](#) and [Alternative Lexical Labels](#) panes display the related label entries on the right.

## Selecting a Label

1. Select a concept label entry in the Search Results pane and choose **Select Label** to link the label to a TMS Collections record.
2. To use a different label for a concept, locate the concept in the hierarchy and double click on a label entry in the Preferred Lexical Labels or Alternative Lexical Labels panes.
3. If an alternative label is selected, a prompt will open asking if the preferred label should be used. To use the preferred label for the concept, select **Yes**. To continue linking the alternative label, select **No**.

# Concepts

A concept is any unit of thought that can be defined or described. Concepts are grouped together in a hierarchical structure called a concept scheme, such as a thesaurus or taxonomy. Preferred and alternative lexical labels are created for concepts to represent a concept's meaning when referenced.

## Viewing Concepts

Concepts are displayed in the Concept Hierarchy on the left side of the Thesaurus Manager window and are represented by their default preferred lexical labels.

When a concept is selected, the preferred lexical labels and alternative lexical labels display in the panes on the right. The Scope Notes pane displays a definition and guide for a concept to convey its purpose and extent. The Hierarchy pane displays the path to the concept from the root in a hierarchical concept scheme.

## Concept Properties

Select a concept in the Concept Hierarchy, right click, and go to **View Concept** to open the View Concept window which contains fields related to the properties of the concept.

## Sorting Concepts

1. Open a concept scheme in the Concept Hierarchy and select a concept where multiple concepts are displayed on the same tier level in the hierarchy.
2. Right click, go to **Sort Current Tier**, and select a sorting option. The sorting options include **By Text**, **By Date**, and **By Order Entered**, each with an ascending or descending sort preference

 Only locally configured concepts may be sorted. Concepts in concept schemes from external authorities, such as the ATT or TGN, cannot be sorted.

## Custom Sorting

1. Select a concept, right click, and go to **Sort Current Tier>Reposition Concept**.
2. The concept label turns a gray color in the hierarchy.
3. Right click on another concept from the same tier level, and go to **Sort Current Tier**, and select either **Position Above** or **Position Below**.
4. The hierarchy updates to display the repositioned concept above or below the concept that was right clicked.

 After selecting a concept and clicking the *Reposition Concept* option, be mindful to only right click on the next concept to choose *Position Above* or *Position Below*. Selecting the concept before right clicking will clear the *Reposition Concept* option.

## Creating a New Concept

1. In the Concept Hierarchy navigate to an area in a concept scheme where a new concept should be created.
2. Select the concept that is one level above the tier where the concept should be created. For example, to create a concept for *Pacific Ocean*, the concept level above, *Oceans*, would be selected.
3. Right click on the selected concept and select **Add Narrower Concept**. The Add New Concept window opens.
4. Use the fields in the Add New Concept window to enter information about the new concept (see field list below).
5. After entering information in the Add New Concept window fields, select **Apply** and then **OK**. The new concept now displays in the Concept Hierarchy under the concept that was selected.
6. After creating a concept, additional preferred lexical labels and alternative lexical labels can be created and associations can be created between concepts. Refer to the [Preferred Lexical Labels](#), [Alternative Lexical Labels](#), and [Concept Associations](#) sections for more information.

 Users that have been granted add/edit rights can add or edit concepts, preferred lexical labels, and alternative lexical labels in the Concept Schemes where they have been granted. See [Managing Thesaurus Security](#) for more information.

| Add New Concept Window Fields | Description  | Field Entry    | Authority Controlled? |
|-------------------------------|--|----------------|-----------------------|
| Preferred Label               | The preferred lexical label for a concept. Only one preferred label may be created per language. | Free text      | No                    |
| Language                      | The language related to concept label.   | Text pull-down | Yes                   |

|                         |  |                           |    |
|-------------------------|--|---------------------------|----|
| Qualifier               | A qualifier for a label which may be used to distinguish it from other homographic labels. The value entered in the <i>Qualifier</i> field automatically populates in parenthesis at the end of the <i>Display Label</i> field value. For example, qualifiers for the label, <i>Crane</i> , could either be <i>bird</i> or <i>lifting equipment</i> .<br><br> The Art and Architecture Thesaurus (AAT) uses the <i>Qualifier</i> field to indicate whether a concept is a <i>facet</i> . Facets are concepts that serve as categories for narrower sub-facets and concepts. | Free text                 | No |
| Modifier                | A modifier for a label with multiple words, typically used in a reversed order, such as for an index where concepts are listed alphabetically. The value typed in the <i>Modifier</i> field automatically populates in the <i>Display Label</i> field after the <i>Label</i> field value and a comma. For example, for the preferred label <i>social sciences</i> , an alternative label may be created with <i>sciences</i> as the <i>Label</i> value, and <i>social</i> as the modifier. The <i>Display Label</i> field is then auto-populated with the value <i>sciences, social</i> .  | Free text                 | No |
| Scientific Name Author  | The author of a taxonomic scientific concept.  | Free text                 | No |
| Display Label           | A display label for a concept which displays in the Concept Hierarchy. Automatically populated with concatenated values entered in the <i>Preferred Label</i> , <i>Scientific Name Author</i> , <i>Modifier</i> , and <i>Qualifier</i> fields. May be entered manually.  | Auto-populated, Free text | No |
| Label Source Id         | A unique identification number or code assigned to a label by the source or creator. Used for migrating labels to a newer version of a concept scheme.   | Free text                 | No |
| Scope Notes             | A definition and guide for a concept to convey its purpose and extent.   | Free text                 | No |
| Historical Notes        | Used to record information about changes to a concept, such as if a concept is copied or linked from another concept scheme, or if concept information changes.  | Free text                 | No |
| Begin Year              | The year that a concept was created or put in use.   | Numeric                   | No |
| End Year                | The year that a concept stopped being used.  | Numeric                   | No |
| Concept Source Id       | A unique identification number or code assigned to a concept by the source or creator. Used for migrating labels to a newer version of a concept scheme.   | Free text                 | No |
| Concept Source          | The source from which a concept originated.  | Free text                 | No |
| Candidate Label         | Used to indicate that a label has not yet been approved for inclusion in a standardized concept scheme.  | Checkbox                  | No |
| Approved                | Used to indicate that a concept has been approved and is included in a standardized concept scheme.  | Checkbox                  | No |
| Primary Preferred Label | Indicates that a label is the primary preferred lexical label for a concept in a given language.   | Read Only                 |    |
| Display Preferred Label | Indicates that a label is the displayed preferred lexical label for a concept. This is applicable when a preferred lexical label in a language other than the default concept scheme language has been set as the display default label for a concept.   | Read Only                 |    |
| Guide Concept           | A concept that is used as a guide within the concept scheme to navigate to narrower concepts. Guide concepts are surrounded by <i>Less Than</i> and <i>Greater Than</i> characters and are typically not selected as terms to add to TMS records themselves. An example guide concept may be <continents> with narrower concepts for each continent contained within.  | Checkbox                  | No |

## Editing a Concept

1. Select a concept to be edited in the Concept Hierarchy on the left, right click, and select **Edit Concept**. The Edit Concept window opens.
2. Use the fields on the Edit Concept window to update information for the concept.
3. When finished, select **Apply** to save the updates, then **OK** to close the Edit Concept window.



Only locally configured concepts may be edited. Concepts imported from external thesauri or taxonomies, such as the AAT or TGN, cannot be edited unless they have been copied into a local concept scheme.

## Copying a Concept

A concept may be copied to a different place within the same concept scheme or to a different concept scheme. If a concept contains narrower concepts, they are copied as well. Be mindful that associations between concepts are not included when copying a concept from one place to another.

1. Select a concept in the Concept Hierarchy, right click, and select **Copy Concept**.
2. Select a concept in the hierarchy where the copied concept should be included, right click, and select **Paste Concept**.

3. A prompt will open asking if the concept should be copied. Select **Yes**.

## Moving a Concept

A concept may be moved to a different place within the same concept scheme or to a different concept scheme. If a concept contains narrower concepts, they are moved as well. Associations between concepts are included when moving a concept to a different place within the same concept scheme. Concept associations may be lost, however, if a concept is moved into a different concept scheme.

 Only locally configured concepts may be moved. Concepts imported from external thesauri or taxonomies, such as the AAT or TGN, cannot be edited unless they have been copied into a local concept scheme.

1. Select a concept in the Concept Hierarchy, right click, and select **Cut Concept**.
2. Select a concept in the hierarchy under which the cut concept should be moved, right click, and select **Paste Concept**.
3. A prompt opens, asking if the concept should be moved. If a concept is being moved to a different concept scheme, the prompt also states that concept associations may be lost. Select **Yes** to move the concept.

## Linking Concepts

Concepts may be linked to other areas of a concept scheme or to a different concept scheme to create poly-hierarchical concepts. Refer to the [Poly-hierarchical Concepts](#) section for more information.

## Setting a Display Language

If a concept has preferred lexical label entries in multiple languages, a language other than the concept scheme default language can be selected to display for the concept in the hierarchy. An additional option allows for the labels for narrower concepts contained within the concept to be set to different language as well.

1. Select a concept in the Concept Hierarchy, right click, and go to **Set Display Language**, and select either **Current Concept** for just the concept, or **Current Branch** for the concept and its included narrower concepts.
2. When the prompt opens, use the pull-down list to select the language that should be displayed for the concept labels in the hierarchy. The concept label(s) now display in the hierarchy in the selected language

 If a concept does not have a label entry in the language selected, that concept label displays in the default concept scheme language.

## Clearing a Display Language

To reset a concept label to the default concept scheme language:

1. Select the concept in the Concept Hierarchy, right click, and go to **Clear Display Language**, and select either **Current Concept** to reset just the concept label, or **Current Branch** to reset the labels and all narrower concepts included. The language for the concept label(s) reverts to the default concept scheme language.

## Deleting a Concept

Concepts can only be deleted if they do not contain narrower concepts, are not currently associated with other concepts, and are not from external concept schemes, such as the AAT or TGN.

When a concept is deleted, the preferred and alternative label entries related to the concept are deleted as well.

1. Select a concept to be deleted in the Concept Hierarchy on the left, right click and select **Delete Concept**.
2. A prompt opens, stating that the concept along with all of its labels will be deleted. Select **OK**. The concept is now removed from the Concept Hierarchy.

# Concept Associations

Non-hierarchical associations can be created between related concepts in the same concept scheme or between two concepts in different concept schemes. Concept associations provide richer contextual search information for thesauri than relationships based solely on a hierarchical structure. Concept associations are created using a relationship type, such as composed of, ancestor of, preceded, and followed.

As an example, an association could be created between a concept for a structure and concepts for the materials from which it is built. In another example, a concept for an art movement could be associated with concepts for the creators involved, or concepts for the movements that came before and after.

## Viewing Associated Concepts

Select a concept in the Concepts Hierarchy on the left side of the Thesaurus Manager window. Click the **Show Related Concepts** button in at the top of the window.

The Related Concepts pane replaces the Preferred Lexical Labels pane on the right. Associated concept entries display in the Related Concepts pane.

## Associated Concept Properties

The Related Concepts pane displays the *Relationship Type*, *Concept*, *Begin Year*, *End Year*, and *Display Date* for each associated concept entry.

## Creating a Concept Association

Associations between concepts can only be created if a concept scheme has been configured with the *Concept Relationship Types* option enabled. When creating an association for two concepts from different schemes, at least one scheme must be configured with the *Concept Relationship Types* option enabled. For information about concept scheme configuration, refer to the [Concept Schemes](#) section.

## Creating Relationships

Before an association can be made between concepts, the relationship type between the concepts must first be created.

When a concept scheme is configured with the *Concept Relationship Types* option enabled, a hierarchy called *Relationship* is automatically added to the scheme in the Concepts Hierarchy.

In the Relationship hierarchy, create narrower concepts to describe relationships to use between associated concepts. The concepts created in this hierarchy populate the *Relationship Type* pull-down field when creating concept associations. Refer to the [Concepts](#) section for information on creating new concepts.



Concept associations cannot be created in imported external thesauri or taxonomies, such as the AAT, or TGN. However, concepts in external thesauri or taxonomies can be used to create associations in locally configured concept schemes.

1. Select a concept in the Concepts Hierarchy on the left, right click, select **Copy Concept**.
2. Navigate to another concept to associate with the one just copied.
3. Select the concept, right click, and select **Paste Association**. The Add New Relationship window opens (see field list below)
4. After entering information in the Add New Relationship window fields, select **OK**. The new associated concept entry displays in the Related Concepts pane.

| Add New Relationship Window Fields | Description  | Field Entry    | Authority Controlled? |
|------------------------------------|--|----------------|-----------------------|
| Concept                            | The concept copied in the Concepts Hierarchy to create an association.   | Read Only      |                       |
| Relates To Concept                 | The second concept selected to create an association.  | Read Only      |                       |
| As (relationship type)             | The type of relationship that describes the association of concepts. The values available relate to the concepts created under the <i>Relationship</i> hierarchy when a concept scheme is configured with the <i>Concept Relationship Type</i> box checked.<br><br><div style="border: 1px solid orange; padding: 5px; margin-top: 10px;">  If an association is being created between concepts from different concept schemes, each with their own <i>Relationship</i> hierarchy, the values from both hierarchies will be available in the <i>As (relationship type)</i> pull-down list. All tier levels of concepts in the <i>Relationship</i> hierarchy display in the <i>As (relationship type)</i> pull-down list equally.         </div> | Text pull-down | Yes                   |
| Begin Year                         | The year that an association between two concepts began.   | Numeric        | No                    |

|              |  |                                 |    |
|--------------|--|---------------------------------|----|
| End Year     | The year that an association between two concepts ended.   | Nu<br>mer<br>ic                 | No |
| Display Date | A display date for an association between two concepts. May be generated from the values in the <i>Begin Year</i> and <i>End Year</i> fields (button), or may be entered manually. | Butt<br>on<br>/Fre<br>e<br>text | No |

## Editing a Concept Association

1. Select an associated concept entry in the Related Concepts pane, right click, and select **Edit Relationship**. The Edit Relationship window opens.
2. Use the fields on the Edit Relationship window to update information about the concept association.
3. When finished, select **OK** to save the updates.

 Concept associations cannot be edited in imported external thesauri or taxonomies, such as the AAT, or TGN.

## Locating an Associated Concept

1. Select an associated concept entry in the Related Concepts pane, right click, and select **Locate Concept**.
2. The Concepts Hierarchy navigates to the associated concept in the hierarchy.
3. To see the preferred and alternative lexical labels for the associated concept, deselect **Show Related Concepts** at the top of the window to display the Preferred Lexical Labels and Alternative Lexical Labels panes.

## Deleting a Concept Association

1. Select an associated concept entry in the Related Concepts pane, right click, and select **Delete Relationship**.
2. A prompt opens asking if the relationship should be deleted. Select **Yes**.

 Deleting a concept association only deletes the relationship between two concepts.

# Poly-hierarchical Concepts

Poly-hierarchical concepts are created when a concept is linked from one area to another in the same concept scheme or a different concept scheme. Narrower concepts included in the linked concept are linked as well.

Poly-hierarchical concepts differ from copied or moved concepts in that they are neither copied nor moved, but referenced, and concept associations remain in place. Changes made to a linked concept are reflected in the original concept location and all of its linked instances.

## Viewing Poly-hierarchical Concepts

Poly-hierarchical concept labels display in blue text in the Concept Hierarchy. The actual concept in the originating location displays in italic characters as well to distinguish it from its linked instances.

When a poly-hierarchical concept is selected in a hierarchy, the Hierarchy pane at the bottom of the window displays multiple paths to the term in a concept scheme, or paths in multiple concept schemes.

## Creating a Poly-hierarchical Link

1. Select a concept in the Concept Hierarchy, right click, and select **Copy Concept**.
2. Select a concept in the hierarchy under which the copied concept should be linked, right click, and select **Paste Link**.
3. A prompt opens, asking if the concept should be linked. Select **Yes** to link the concept.

## Setting a Preferred Broader Concept

A concept can be relocated to a linked instance in the Concept Hierarchy, making the original concept location a linked instance in the process. Associations between concepts may be lost when relocating a concept to a linked instance.

1. Select a linked instance of a concept in the hierarchy, right click and select **Set Preferred Broader Concept**.
2. A prompt opens, asking if the concept should be relocated and stating that any associations may be lost. Select **Yes**.
3. The selected concept in the hierarchy now displays in italics to indicate that it is now the actual concept and the concept at the original location no longer displays in italics to indicate that is now a linked instance.

## Removing a Poly-hierarchical Link

1. Select a linked instance of a concept in the Concept Hierarchy, right click, and select **Un-Link Concept**.
2. A prompt opens, asking if the linked instance should be removed. Select **Yes**. The linked instance is removed from the hierarchy.



Removing a linked instance of a concept does not delete the actual concept, only the linked instance in the hierarchy. If the actual concept is no longer linked anywhere else, the concept no longer displays in blue in the hierarchy.

# Concept Schemes

A concept scheme is a grouping of concepts in a hierarchical structure, such as a controlled vocabulary, thesaurus or taxonomy.

The Thesaurus Manager allows users to create local concept schemes and import external concept schemes provided by Gallery Systems. The *Art and Architecture Thesaurus* (AAT) and the *Thesaurus of Geographic Names* (TGN) from the Getty Institute are loaded in the Thesaurus Manager by default.

## Creating a Concept Scheme

Concept schemes can be created for controlled vocabulary authorities, taxonomies, and thesauri.

1. In the Thesaurus Manager window, select **Manage Concept Schemes** at the top and then select **Add Concept Scheme**. The Add Concept Scheme window opens (see field list below).
2. Use the fields to enter information about the concept scheme.
3. When finished select **OK** or **Apply**.



Manage Concept Schemes will be visible and have all available options in the pull-down list, only if the user has been granted *Thesaurus Manager – Administrator* Functional Security rights. See the [Managing Thesaurus Security](#) section for more information.

| Add Concept Scheme Window Fields | Description   | Field Entry    | Authority Controlled? |
|----------------------------------|---|----------------|-----------------------|
| Concept Scheme                   | A name for a concept scheme.  | Free text      | No                    |
| Default Language                 | The primary language for a concept scheme.  | Text pull-down | Yes                   |
| Source                           | The source from which a concept scheme originated.  | Free text      | No                    |
| Concept Scheme Type              | Sets a type for a concept scheme, local authority, local taxonomy, or external thesaurus.   | Text pull-down | Yes                   |
| Credit Line                      | A credit line for the source or creator of a concept scheme.  | Free text      | No                    |
| Installed Version                | A version number related to a concept scheme instance, such as the version number of an imported external thesaurus.  | Free text      | No                    |
| Scope Notes                      | A definition and guide for a concept scheme to convey its purpose and extent.   | Free text      | No                    |
| Historical Notes                 | Notes about tracking changes or versions of a concept scheme, such as if hierarchies from other concept schemes are copied into another.  | Free text      | No                    |
| Concept Relationship Types       | <p>Adds a <i>Relationship</i> concept to a concept scheme when first created. Relationship concepts can be used to describe associations between other concepts.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> This field must be checked in order for concept associations to be created.</p> </div> | Checkbox       | No                    |

## Populating a Concept Scheme

After a Concept Scheme has been created, concepts can be added. Refer to the [Concepts](#) section for more information.



When a new Concept Scheme is created, the user who created it must grant them self rights to edit the Concept Scheme.

## Editing a Concept Scheme

1. Select a root level concept scheme folder in the Concepts Hierarchy, right click, and select **Edit Concept Scheme**. The Edit Concept Scheme window opens.
2. Use the fields in the window to update the concept scheme. Select **Apply** to save the changes, then select **OK**.

## Importing and Migrating Concept Schemes

For information on importing new versions of concept schemes, and migrating labels from the old scheme to the new scheme, contact Gallery Systems Professional Services.

## Deleting a Concept Scheme

When a concept scheme is deleted, all linked concept terms in thesaurus related TMS fields originating from that concept scheme are deleted as well.



Creating a backup of the TMS database is recommended before deleting a concept scheme.

1. Select **Manage Concept Schemes** at the top of the window, then select **Delete Concept Scheme**. The Delete Concept Scheme window opens. The list in the top portion of the window displays the available concept schemes, along with the status and whether it is an external concept scheme.
2. Select a concept scheme entry in the list and select **Delete** in the top right corner.
3. A prompt opens stating that deleting a concept scheme is irreversible and asks if it should be deleted. Select **Yes**.
4. A second prompt opens reporting all of the areas where concepts are linked to TMS Collections records, and asking if the scheme should continue being deleted. Select **Yes**.



If a concept scheme is very large, or if there are a lot of references to the concepts in TMS Collections records, it may take some time for the concept scheme to delete. **Show Status** can be selected to see the concept scheme deletion progress.

Once a concept scheme is deleted, the concept scheme name displays in the Delete Concept Schemes grid at the bottom of the window.

# Mapping Concepts to a Taxonomic Structure

Concepts in a locally configured thesaurus can be mapped to the hierarchical structure of a taxonomy. This may be useful for establishing and maintaining hierarchical structure order.

## Creating a Taxonomic Structure

A concept scheme configured as a taxonomy must first be created or imported. The taxonomic concept scheme should only contain concepts that represent the levels of the hierarchical structure that will be applied to the concepts in a separate concept scheme, such as a thesaurus.

Refer to the [Concept Schemes](#) and [Concepts](#) sections for information on creating and configuring concept schemes and concepts.

## Mapping a Thesaurus Concept

1. In a concept scheme configured as a thesaurus or local authority, navigate to and select a concept in the Concepts Hierarchy.
2. Select **Show Related Concepts** at the top of the window.
3. The Taxonomy pane replaces the Alternative Lexical Labels pane in the lower right.
4. Use the *Taxonomy* pull-down list at the top of the pane to select the taxonomy that was created for the hierarchical structure. The Taxonomy pane does not display when the selected concept on the left is from a concept scheme not configured as a taxonomy. If there is more than one concept scheme configured as a taxonomy, they also are available in the *Taxonomy* pull-down list.
5. The hierarchical structure for the selected taxonomy populates the Taxonomy Concept column. Each row indicates a narrower concept in the hierarchy. The arrow to the left of each taxonomic concept can be selected to expand or collapse the taxonomic structure.
6. In the Concept column, select a row next to a taxonomic level that relates to the concept selected in the Concepts Hierarchy. When a pull-down list displays the selected concept, select it. The concept now displays in the Concepts column next to the corresponding taxonomic level.



A concept may not be mapped to more than one level of a taxonomic structure at a time.

## Mapping All Current Tier Concepts

After mapping one concept to a taxonomic structure, all other concepts at the same tier level may be mapped to the same taxonomic level at once.

1. Right click on the mapped concept name in the Concepts column, and select **Copy Taxonomy Concept Across Current Tier**.
2. A prompt opens asking if all concepts on the current tier level should be mapped to the taxonomic level. Select **Yes**.

## Clearing Mapped Thesaurus Concepts

Concepts on the same tier level may be cleared from a taxonomic level mapping at once.

1. In the Taxonomy pane, right click on a concept in the Concept column, and then select **Clear the Taxonomy Concept from the Current Tier**.
2. A prompt will display asking if the mapping to the taxonomic concept should be cleared. Select **Yes**.

# Preferred Lexical Labels

Preferred lexical labels are the primary terms used to represent concepts. Concepts may have one preferred lexical label for each language available. Typically, the primary preferred lexical label is the one that matches the default language of a concept scheme.

## Viewing Preferred Lexical Labels

In the Thesaurus Manager, the preferred lexical labels display in the Concept Hierarchy on the left, representing their related concepts. When a concept is selected in the hierarchy, the Preferred Lexical Labels pane on the right displays preferred lexical label entries for the concept that have been created in other languages. The entry for the primary preferred lexical label displays in blue text.

## Preferred Lexical Label Properties

The Preferred Lexical Labels pane displays the *Display Label*, *Language*, *Local*, *Candidate Label*, and *Approved* properties for each preferred label entry.

To view more properties for a preferred label:

1. Select a preferred lexical label in the Preferred Lexical Label pane, right click, and select **View Preferred Label** to open the View Preferred Label window which contains fields related to the properties of the label.

## Creating a Preferred Lexical Label

When a concept is created, the default preferred lexical label is created at the same time. The first preferred lexical label is typically created using the same language as the default language of the concept scheme.

To create a preferred lexical label in a different language:

1. Select a concept in the Concept Hierarchy on the left and right click, or right click in the Preferred Label pane, and select **Add New Preferred Label**. The Add New Preferred Label window opens (see field list below).
2. After entering information in the Add New Preferred Label window fields, select **Apply** and then **OK**. The new preferred lexical label entry now displays in the Preferred Lexical Labels pane. Preferred lexical labels may be created from linked instances of a concept. New preferred label entries will display in all linked poly-hierarchies and the original concept location



In order to create a preferred lexical label, the user must be granted add/edit rights to the Concept Scheme. See [Managing Thesaurus Security](#) for more information.

| Add New Preferred Label Window Fields | Description  | Field Entry               | Authority Controlled? |
|---------------------------------------|--|---------------------------|-----------------------|
| Preferred Label                       | A preferred definition or description of a concept. Only one preferred label may be created per language.  | Free text                 | No                    |
| Language                              | The language related to a preferred lexical label.   | Text pull-down            | Yes                   |
| Qualifier                             | A qualifier for a preferred lexical label which may be used to distinguish it from other homographic labels. The value entered in the <i>Qualifier</i> field automatically populates in parenthesis at the end of the <i>Display Label</i> field value. For example, qualifiers for the label, <i>Crane</i> , could either be <i>bird</i> or <i>lifting equipment</i> .<br><br><div style="border: 1px solid #f0e68c; padding: 5px; margin-top: 10px;">  The Art and Architecture Thesaurus (AAT) uses the <i>Qualifier</i> field to indicate whether a concept is a <i>facet</i>. Facets are concepts that serve as categories for narrower sub-facets and concepts.         </div> | Free text                 | No                    |
| Modifier                              | A modifier for a preferred lexical label with multiple words, typically used in a reversed order, such as for an index where concepts are listed alphabetically. The value typed in the <i>Modifier</i> field automatically populates in the <i>Display Label</i> field after the <i>Preferred Label</i> field value and a comma character. For example, for the concept, <i>social sciences</i> , a preferred lexical label may be created with <i>sciences</i> as the <i>Preferred Label</i> value, and <i>social</i> as the modifier. The <i>Display Label</i> field is then auto-populated with the value <i>sciences, social</i> .  | Free text                 | No                    |
| Scientific Name Author                | The author of a scientific preferred lexical label.  | Free text                 | No                    |
| Display Label                         | A display label for a preferred lexical label which displays in the Concept Hierarchy. Automatically populated with concatenated values entered in the <i>Preferred Label</i> , <i>Scientific Name Author</i> , <i>Modifier</i> , and <i>Qualifier</i> fields. May be entered manually.  | Auto-populated, Free text | No                    |

|                         |  |           |    |
|-------------------------|--|-----------|----|
| Label Source Id         | A unique identification number or code assigned to a preferred lexical label by the source or creator. Used for migrating labels to a newer version of a concept scheme.   | Free text | No |
| Scope Notes             | A definition and guide for a preferred lexical label to convey its purpose and extent.   | Free text | No |
| Historical Notes        | Used to record information about changes to a preferred lexical label, such as when it was approved in a standardized concept scheme.  | Free text | No |
| Candidate Label         | Used to indicate that a preferred lexical label has not yet been approved for inclusion in a standardized concept scheme.  | Checkbox  | No |
| Approved                | Used to indicate that a preferred lexical label has been approved and is included in a standardized concept scheme.  | Checkbox  | No |
| Primary Preferred Label | Indicates that a preferred lexical label is the primary preferred lexical label for a concept in a given language. Typically, this is the preferred lexical label in the default language of the concept scheme.   | Read Only |    |
| Display Preferred Label | Indicates that a preferred lexical label is the displayed preferred lexical label for a concept. This is applicable when a preferred lexical label in a language other than the default concept scheme language has been set as the display default preferred lexical label for a concept. | Read Only |    |

## Editing a Preferred Lexical Label

1. Select a preferred lexical label in the Preferred Lexical Labels pane, right click, and select **Edit Preferred Label**.
2. The Edit Preferred Label window opens. Only locally configured preferred lexical labels may be edited. Preferred labels imported from external thesauri or taxonomies, such as the AAT or TGN, cannot be edited unless they have been copied into a local concept scheme. Use the fields on the Edit Preferred Label window to update information for the label.
3. When finished, select **Apply** to save the updates, then **OK** to close the Edit Preferred Label window.



Preferred lexical labels may be edited from linked instances of a concept. Updated preferred label entries will display in all linked poly-hierarchies and the original concept location.

## Setting a New Primary Preferred Label

The preferred lexical label set as the primary label displays in blue in the Preferred Lexical Labels pane.

If a concept has preferred lexical label entries in different languages, a different entry may be set to be the primary preferred label.

1. In the Preferred Lexical Labels pane, select a preferred label entry to make the primary label. Right click, select **Set to Primary Preferred Label**. The selected label now displays in blue text in the Preferred Lexical Labels pane to indicate that it is now the primary preferred label.

## Converting a Preferred Label to an Alternative Label

A preferred label in the Preferred Lexical Labels pane may be converted into an alternative lexical label. Alternative lexical labels are other forms of expression for a concept, such as synonyms, search term equivalents, or index terms.



The primary preferred lexical label cannot be converted to an alternative label.

1. Select a preferred label entry in the Preferred Lexical Labels pane, right click, go to **Convert To** and select a label type. The label moves from the Preferred Lexical Labels pane to the Alternative Lexical labels pane.

Refer to the [Alternative Lexical Labels](#) section for information on alternative labels.

## Deleting a Preferred Lexical Label

A preferred lexical label can only be deleted if it is not currently linked to any TMS Collections records and is not the primary preferred label. Refer to the [Label Usage Count](#) section for information on checking for instances where a label is linked.

1. Select a preferred label in the Preferred Lexical Labels pane, right click, select **Delete Preferred Label**.
2. A prompt opens, asking if the preferred label should be deleted. Select **Yes**.



Preferred lexical labels may be deleted from linked instances of a concept. Deleted preferred label entries will be removed in all linked poly-hierarchies and the original concept location.

# Alternative Lexical Labels

Alternative lexical labels are representations of a concept that go beyond a preferred label, such as synonyms, abbreviations, and spelling variants.

## Viewing Alternative Lexical Labels

In the Thesaurus Manager, when a concept is selected in the Concept Hierarchy on the left, the Alternative Lexical Labels pane on the right displays alternative lexical label entries for the concept.

## Alternative Lexical Label Properties

The Alternative Lexical Labels pane displays the *Display Label*, *Label Type*, *Language*, *Local*, *Candidate Label*, and *Approved* properties for each alternative label entry.

To view more properties for an alternative label, select a label entry in the Alternative Lexical Label pane, right click, and select **View Alternative Label** to open the View Alternative Label window which contains fields related to the properties of the label.

## Creating an Alternative Lexical Label

1. Select a concept in the Concept Hierarchy on the left and right click, or right click in the Alternative Label pane, and select **Add New Alternative Label**. In order to create an alternative lexical label, the user must be granted add/edit rights to the Concept Scheme. See [Managing Thesaurus Security](#) for more information. The Add New Alternative Label window opens (see field list below).
2. After entering information in the Add New Alternative Label window fields, select **Apply** and then **OK**. The new alternative lexical label entry now displays in the Alternative Lexical Labels pane.



Alternative lexical labels may be created from linked instances of a concept. New alternative label entries display in all linked poly-hierarchies and the original concept location.

| Add New Alternative Label Window Fields | Description  | Field Entry               | Authority Controlled? |
|---|--|---------------------------|-----------------------|
| Alternative Label                       | An alternative definition or description of a concept, such as a synonym, abbreviation, or alternate spelling.   | Free text                 | No                    |
| Language                                | The language related to an alternative lexical label.  | Text pull-down            | Yes                   |
| Qualifier                               | A qualifier for an alternative lexical label which may be used to distinguish it from other homographic labels. The value entered in the <i>Qualifier</i> field automatically populates in parenthesis at the end of the <i>Display Label</i> field value. For example, qualifiers for the label, <i>Crane</i> , could either be <i>bird</i> or <i>lifting equipment</i> .   | Free text                 | No                    |
|   | The Art and Architecture Thesaurus (AAT) uses the <i>Qualifier</i> field to indicate whether a concept is a <i>facet</i> . Facets are concepts that serve as categories for narrower sub-facets and concepts.  |                           |                       |
| Modifier                                | A modifier for an alternative lexical label with multiple words, typically used in a reversed order, such as for an index where concepts are listed alphabetically. The value typed in the <i>Modifier</i> field automatically populates in the <i>Display Label</i> field after the <i>Alternative Label</i> field value and a comma character. For example, for the concept, <i>social sciences</i> , a preferred lexical label may be created with <i>sciences</i> as the <i>Alternative Label</i> value, and <i>social</i> as the modifier. The <i>Display Label</i> field is then auto-populated with the value <i>sciences, social</i> . | Free text                 | No                    |
| Scientific Name Author                  | The author of a scientific alternative lexical label.  | Free text                 | No                    |
| Display Label                           | A display label for an alternative lexical label. Automatically populated with concatenated values entered in the <i>Alternative Label</i> , <i>Scientific Name Author</i> , <i>Modifier</i> , and <i>Qualifier</i> fields. May be entered manually.   | Auto-populated, Free text | No                    |
| Label Type                              | The context for an alternative label entry, such as synonym, search term equivalent, or common name.   | Text pull-down            | Yes                   |
|   | The authority list for Label Type is accessible from within the <a href="#">Other Authority</a> screen and is called Term Types.   |                           |                       |

|                 |   |           |    |
|-----------------|---|-----------|----|
| Label Source Id | A unique identification number or code assigned to an alternative lexical label by the source or creator. Used for migrating labels to a newer version of a concept scheme. | Free text | No |
| Candidate Label | Used to indicate that an alternative lexical label has not yet been approved for inclusion in a standardized concept scheme.  | Checkbox  | No |
| Approved        | Used to indicate that an alternative lexical label has been approved and is included in a standardized concept scheme.  | Checkbox  | No |

## Editing an Alternative Lexical Label

1. Select an alternative lexical label in the Alternative Lexical Labels pane, right click, select **Edit Alternative Label**. The Edit Alternative Label window opens. Only locally configured alternative lexical labels may be edited. Alternative labels imported from external thesauri or taxonomies, such as the AAT or TGN, cannot be edited unless they have been copied into a local concept scheme.
2. Use the fields on the Edit Alternative Label window to update information for the label. When finished, select **Apply** to save the updates, then **OK** to close the Edit Alternative Label window.



Alternative lexical labels may be edited from linked instances of a concept. Updated alternative label entries display in all linked poly-hierarchies and the original concept location.

## Converting an Alternative Label to a Preferred Label

An alternative label in the Alternative Lexical Labels pane may be converted into a preferred lexical label. Preferred lexical labels are the primary terms used to represent concepts. A concept may only have one preferred lexical label for each language available. If an alternative label is converted to a preferred label where both labels are the same language, the preferred label is converted to an alternative label with the label type, *Alternate Term*.

1. Select an alternative label entry in the Alternative Lexical Labels pane, right click, go to **Convert To Preferred Label**.
2. If there is already a preferred label entry in the same language, a prompt opens, stating that the alternative label will move in place of the preferred label, and the preferred label will become an alternative label. Select **Yes**. The label moves from the Alternative Lexical Labels pane to the Preferred Lexical labels pane. If a preferred label was replaced it also moves to the Alternative Lexical Labels pane.

Refer to the [Preferred Lexical Labels](#) section for information on preferred labels.

## Deleting an Alternative Lexical Label

An alternative label may only be deleted if it is not linked to any TMS Collections records. Refer to the [Label Usage Count](#) section for information on checking for instances where a label is linked.

1. Select an alternative label in the Alternative Lexical Labels pane, right click, select **Delete Alternative Label**.
2. A prompt opens, asking if the alternative label should be deleted. Select **Yes**.



Alternative lexical labels may be deleted from linked instances of a concept. Deleted alternative label entries are removed in all linked poly-hierarchies and the original concept location.

# Label Usage Count

A count can be generated for a concept to tally how many instances of its preferred and alternative label entries are linked to TMS Collections records. This can be useful when gathering statistics, searching and replacing, or deleting label entries.

1. To run a label usage count, select a concept in the Concept Hierarchy on the left side of the Thesaurus Manager window.
2. Select **Check Label Usage** at the top of the window.
3. A Usage Count column now displays in the Preferred Lexical Labels and Alternative Lexical Labels panes. The numbers in each row indicate the number of linked label entry instances in TMS Collections. Hovering the mouse cursor over a Usage Count number opens a tooltip window which lists the places where the label is linked in TMS Collections records. Each row in the tooltip window states the module context and thesaurus field where a label is linked and how many instances there are for each.



The primary preferred lexical label for a concept will always have at least one instance for being the term master for a concept.

# Locating Term Types

The Thesaurus Manager provides a way to view all configured term types in the *Attributes*, *Geography Cross References*, and *Status Terms* widgets in TMS Collections.

## Viewing Term Type Entries

1. In the Thesaurus Manager window, select **Locate Catalog Term Type** at the top. The Catalog Term Type Selector pane opens on the right.
2. In the pane, the Term Types grid displays entries for all configured term types in TMS Collections. The term type entries may be sorted in ascending and descending order by clicking one of the field column headers in the grid.

| Term Types Grid Columns | Description   |
|-------------------------|---|
| Type                    | The name assigned to a term type.                                   |
| Associated Concept      | The concept selected as the thesaurus access point for a term type. |
| Table                   | The module or module context where a term type is located.          |
| Thesaurus Xref Type     | The thesaurus field in which a term type was configured.            |

## Locating Term Type Related Concepts

1. Select a term type entry in the Term Types grid and select **Locate Concept**. The Concepts Hierarchy navigates to the related concept in the hierarchy on the left.

# Managing Thesaurus Security

The Thesaurus Manager has its own security rights management. Similar to security settings for TMS Collections departments, a user who has been granted Thesaurus Manager – Administrator Functional Security rights can grant users add/edit rights to one or more Concept Schemes.

Concept Schemes are the top level of the thesauri in TMS Collections. The standard Concept Schemes are the *Art and Architecture Thesaurus* (AAT) and the *Thesaurus of Geographic Names* (TGN). Additional Concept Schemes can be created and newer versions of AAT and TGN can be imported as they are released. Refer to the [Concept Schemes](#) section for more information about creating and managing Concept Schemes.

## Two Layers of Functional Security: System Administrator and Thesaurus Manager – Administrator

1. A System Administrator granting a user *Thesaurus Manager – Administrator* Functional Security rights in the [TMS Suite Application Configuration Utility](#) gives that user the ability to perform all administrator functions in the Thesaurus Manager. Refer to the [Security Groups](#) section for more information.
2. A user that has been granted *Thesaurus Manager – Administrator* Functional Security rights can then grant users add/edit rights to one or more Concept Schemes. Those users can add or edit concepts, preferred lexical labels, and alternative lexical labels in the schemes where they have been granted.



Users have view rights to all Concept Schemes, not only the ones to which they have Add/Edit rights.

## Accessing Thesaurus Manager Security

Managing thesaurus security can be found within the Thesaurus Manager.

1. In the task bar on top of the Thesaurus Manager window select **Manage Concept Schemes>Manage Thesaurus Security**. Manage Concept Schemes will be visible and have all available options in the pull-down list, only if the user has been granted *Thesaurus Manager – Administrator* Functional Security rights.
2. The Manage Thesaurus Security window opens. On the left is a list of all Concept Schemes. Select the scheme for which security rights should be set.
3. The column in the middle shows the available users and security groups. Use the buttons on the bottom of the screen to toggle between displaying only individuals or security groups, if desired.
4. Select a User or Security Group and select > to add them to the *Selected Users/Security Groups* list. To add more than one at a time, use **Shift** or **Ctrl** keys to select multiple Users or Security Groups and select >. Selecting >> adds all of the Users or Security Groups at once.
5. All Users and Security Groups listed in the column on the right now have security rights to add and edit concepts, preferred lexical labels, and alternative lexical labels in the selected Concept Scheme. To remove the rights of a User or Security Group from a Concept Scheme, select them from *Selected Users/Security Groups* and select < to remove them, or select << to remove all of the Users or Groups at once.



When a new Concept Scheme is created, the user who created it must grant them self rights to edit the Concept Scheme.

In order for a user's rights to add/edit concepts and labels in a Concept Scheme to be active, the Thesaurus Manager must be accessed via TMS. Refer to the [Thesaurus Manager](#) section for more information about opening the Thesaurus Manager.

For security settings, see [Accessing TMS Thesaurus Manager Security](#) on the [Special Functions Security](#) page.

# Glossary

| Term                        | Definition   |
|-----------------------------|--|
| accessioning                | The process of registering an Object.  |
| acquisition                 | An Object that has been acquired, but not yet registered (accessioned).  |
| associate                   | Create a relationship between two records from the same module.  |
| Back button                 | An icon on a computer screen that typically depicts a backward pointing arrow and that returns the user to a previously shown window or web page.  |
| Bibliography                | References, such as books, exhibition related publications, or magazines.  |
| catalogue                   | To record information about the objects in a collection.   |
| cog                         | A single cog is used to represent Settings.  |
| cog(s)                      | Multiple cogs represent a process (in multiples, they resemble machinery for a mechanical process).  |
| collapsible                 | Able to be hidden or to have certain components (such as options in a menu) hidden by the user when not needed.  |
| Component                   | A part or accessory of a larger whole.   |
| Constituent                 | Individual people, groups, or entities such as businesses.   |
| context                     | Hierarchical categories of data that are related to a record.  |
| conveyance                  | A means of transport, such as a truck or airplane.   |
| ConXRefs                    | Constituents linked to other records in TMS Collections.   |
| Crate                       | A container used to move or store objects.   |
| custom filter               | Used to display specific records based on criteria defined by the user.  |
| Currency Value              | The value of an object in the selected currency.   |
| data entry                  | The process of entering data into a field by typing or selecting an option.  |
| Data Entry display mode     | Provides the user with a screen containing various fields, in which information can be entered.  |
| Data Form (Data Entry View) | A preconfigured collection of fields belonging to the current record.  |
| dbConfig                    | Original name of Web Application Configuration Utility   |
| disabled /enabled           | Rendered inoperative/to cause to operate   |
| Display mode                | The way in which TMS Collections records are viewed and/or edited.   |
| Event                       | Anything that happens. In TMS Collections, Event records can include current and historical events, such as lectures, school visits, meetings, exhibition related events, an event that occurred at a particular site in the past, or an event that relates to the history of an object. |
| EXCEL spreadsheet           | A file that exists of cells in rows and columns and can help arrange, calculate and sort data.   |
| Exhibition                  | A public showing (as of works of art or objects of manufacture).   |
| export                      | To save a copy of the current open document, database, image or video into a file format required by a different application.  |
| field                       | A data structure for a single piece of data. Fields are organized into records, which contain all the information within the table relevant to a specific entity.  |
| formatting                  | The way in which text, pictures, etc. are organized and displayed.   |
| grid                        | A network of uniformly spaced horizontal and perpendicular lines.  |

|                                       |  |
|---------------------------------------|--|
| Insurance Policy                      | A document that contains the agreement that an insurance company and a person/entity have made.  |
| Light Box display mode                | Displays the image thumbnails or media icons for Primary Media Renditions linked to records in a selection.  |
| Link                                  | Create a relationship between two records from different modules.  |
| List display mode                     | Preconfigured List Views display all of the records in the current selection in a list.  |
| List View                             | Lists of records in a table format. They are used to display records throughout TMS Collections.   |
| Loan                                  | When an Object is being temporarily borrowed from or sent to a person or institution. In TMS Collections, each Loan record serves as a representation of a loan transaction.   |
| Media                                 | In TMS Collections, Media records can be created for digital files (jpg, tiff, pdf, etc.) and physical media (slides, transparencies, etc.).   |
| MediaXRefs                            | Media linked to other records in TMS Collections.  |
| Object                                | Besides a basic, physical artwork such as a painting, Object records in TMS Collections can be created to represent non-physical and conceptual entities.  |
| navigation                            | The act of opening and moving through pages. In TMS Collections, this term is being used to refer to the act of opening a record, replacing the currently opened one.  |
| navigation bar                        | Allows the user to move between a selection of records. Located in the TMS Collections dashboard, it provides two methods to move to another record: navigation arrows or entering the record position number.   |
| pop-up                                | A new window that opens in front of what the current screen.   |
| preference                            | Set by clicking the star icon/button.  |
| record                                | A group of related data held within the same structure.  |
| Record Hierarchy tree                 | Visual representation of all data pertaining to a single record. May alternate display with the Record Hierarchy tree.   |
| record selection /record set          | The group of currently open records.   |
| Record Set tab                        | A tab on the left panel of a page that when selected will display a row with an image and identifying data for each record in the current selection. It alternates selection with the Record Hierarchy tree.   |
| Record Usage Report                   | Lists links and dependencies of the current record. This report only displays when attempting to delete a record.  |
| related                               | Can refer to two records linked from different modules, or two records associated from the same module   |
| scrollable                            | To cause displayed text or graphics to move up, down, or across the screen   |
| Searchable                            | The field can be configured for <a href="#">Quick Search</a> or <a href="#">Advanced Query search</a> , which makes it easily locatable. The configuration for searching is done in the in the Web Application Configuration Utility.  |
| Shipment                              | The act or process of shipping. In TMS Collections a Shipment record serves as a representation for a physical shipment.   |
| Sites                                 | A place where something is, was, or will be built, or where something happened, is happening, or will happen. In TMS Collections, a Site record is used to record information about current and historical sites, such as archaeological sites, historic buildings, gardens, or parks. |
| text field                            | A data structure that holds alphanumeric data.   |
| Thesaurus                             | The TMS Collections Thesaurus Manager is a browser-based application that runs in a traditional desktop window or through a browser. It is used to organize and manage structured, controlled data, such as controlled vocabularies, taxonomies, and thesauri.                         |
| TMS Composer                          | Application for configuring data entry forms and certain administrative tasks.   |
| user-defined                          | Not included with TMS Collections; must be configured in Web Application Configuration Utility.  |
| Web Application Configuration Utility | Application for configuring database settings. Originally known as dbConfig.   |

|                |   |
|----------------|---|
| widget         | An element in TMS Collections that displays information or provides a specific way for a user to enter data. A widget contains multiple fields.   |
| XRef List View | A List View of records linked from another module to the current record. It is displayed when a node labeled with the module name (the XRef node) is selected in the Record Hierarchy Tree.   |
| XRef node      | A node in the Record Hierarchy tree that refers to linked records from another module. When the node is selected, records linked from that module will display in a read-only List View (an XRef List View). The node is labeled with the module name (except for linked Constituents in the Objects module, where the nodes correspond to a specific Role and are labeled with the Role Name). |

# Accessibility

TMS Collections conforms to Accessibility guidelines (VPAT2.4Rev508).

For vision impairment **NVDA** is the recommended assistive technology, but **Windows Narrator** and **ChromeVox** may also be used.