



CULTURE GRID

25th May

2010

This Guide is for editors of collection records within the Culture Grid. It supports the management of records that describe the scope, coverage and relevance of UK collections and how people can contact, access and use them.

**Guide for
Collection
Editors**

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Introduction

This Guide is for editors of collection records within the Culture Grid

The Culture Grid is a service provided by Collects Trust to join and open up information about UK collections.

A collection record is a set of information about a collection as a whole. Collection records could be about formal collections e.g. by provenance such as 'The Donor Name Collection', or less formal collections e.g. by subject or media e.g. 'Portrait Collection'. They may be about different collections within an organisation e.g. 'Anyplace Museum, Antique Clock Collection'; 'Anyplace Library, Special Collection' or at the level of an organisation e.g. 'Anyplace Museum Collection'.

The purpose of collection records within the Culture Grid is to provide a comprehensive list of all UK collections i.e. a 'UK Collections Service' that supports all aspects of collections management practice. Collection records are especially useful for informing audiences about the wonders within and relevance of collections and where item records of what is in a collection are not available.

Editors of collection records create, edit or delete records using a simple set of online forms.

How to become a collection record editor

1. Email culturegrid@collectionstrust.org.uk with your contact details, including the institution you are from and stating that you wish to become a Collection Record Editor and why e.g. for your institution and / or a particular regional or national project.
2. Collections Trust will contact you with your personal access details.

Tip If you ever forget your access details or need new access details for any reason, please contact culturegrid@collectionstrust.org.uk stating what you need and why.

Collection Record Overview

A collection record should offer an overview of your collection i.e. a valuable set of information that entices people to engage with your collection.

Sufficient and good quality information should be included in every record, so that people can easily find your collections and understand their scope.

Clear plain English should be used.

Consistent terms and conventions should be used for things like names; subjects, dates; periods, places etc.

Concise information regarding the scope of your collection should be included in the 'description' section of the form, e.g.

- names of people significantly represented, especially major creators or famous people
- main places represented
- the range of media in the collection
- dates covered by the collection
- major items/works in the collection

This will all help people find and use the information you are creating in a range of contexts and help your collection records join up with relevant information from other collections.

In summary, a collection record should provide an introduction to a collection to encourage visits and use of the collection by all. It should be written in plain English and highlight the range of objects and subjects covered by the collection, access details and relevance to audiences.

Overview of creating and editing collection records

First log in at www.culturegrid.org.uk/dpp/ using the access details provided by Collections Trust

Then choose 'Editor Home' from the left hand menu

You will see a screen that includes sections to [edit](#) or [create](#) a new record

The [edit](#) section is the top one titled 'Search for records by collection'

The [create](#) section, titled 'Create a new record' is 3rd from top

Follow the steps below to either [create](#) a new collection record or [edit](#) an existing one and use the Annotated form to see what information should be entered on each part of the form.

Note: You will see different versions of the same form depending on whether you choose to [create](#) or [edit](#) a record. A shorter form with nothing filled in for creating a new record and a longer form with some or all parts completed if editing an existing record.

How to create a new collection record

Editors can [create](#) new records at any time by logging in at www.culturegrid.org.uk/ddp, going to 'Editor Home' (from the left hand menu) and using the 'Create a new record' section' (3rd from top section of the 'Editor Home' page)

If you are an editor of only one 'Culture Grid collection', then you should see the name of that 'collection' in the drop down box in the 'Create a new record' section of the 'Editor Home'. (If you are an editor of records in more than one 'Culture Grid collection' then you can choose which 'Culture Grid collection' to create a new record in by selecting from the drop down box.)

To [create](#) a new collection record, you first need to complete a section of the form that gives enough information to allow people to quickly find your collection and understand what is in it and how to access it. People can then easily decide how relevant the collection is to their needs and plan a visit or contact the collection.

To complete this first section, you need to choose an 'Identifier' for your collection and give your collection a title/name and a description. (A way to create 'collection identifiers' is provided in the annotated form below).

You then choose either to link the address details for your collection with those of your institution or give a different address that is unique to the collection.

You will then need to add other contact details, such as email address and basic access information before pressing 'submit' at the bottom of the form to save and publish the new collection record.

When you press 'submit', you can then choose to continue to [edit](#) the record to make changes or give further additional information. (or go back to 'Editor Home' to create more records)

The further additional information provides more detail about your collection. It helps people find your collection by things such as the subjects, periods and places it covers and special access conditions.

Tip If you press 'return' on your keyboard whilst creating a new record this also 'saves and publishes' the record. If you do this accidentally, you can go back to completing/correcting the record by choosing to continue editing it.

Tip New records will appear in the editing screens as soon as 'submit' is clicked, however new records may not always immediately appear on searches, such as on the Culture Grid website. (Automated processes will ensure that new records are seen in searches later the same day)

How to edit a collection record

To [edit](#) a record you follow a process of searching for the record you wish to [edit](#), making changes and saving/submitted them.

Editors can make edits to existing collection records at any time by logging in at www.culturegrid.org.uk/ddp and going to 'Editor Home' and using the 'Search for records by collection' section' at the top of the 'Editor Home' page.

If you are an editor of only one 'Culture Grid collection', then you should see the name of that 'collection' in the drop down box near the top of the page. (If you are an editor of records in more than one 'Culture Grid collection' then you can choose which 'Culture Grid collection' to [edit](#) a record in by selecting from the drop down box.)

Press 'submit' to take you to a page where you can 'Search for records by collection'. You find the record you wish to [edit](#) as follows:

1. choose '**title**' from the 'within' drop-down box
2. enter a word you expect to be in the title of the collection and press 'submit'
3. if records are found with the word you have entered in the title they shall be listed
4. if a 'no records found' message appears you should try searching for other words that may be in the collection title to make sure a record does not already exist (If you do not find a record to edit then you may need to create one)
5. When you see the record you wish to [edit](#), click on the 'View' link next to it
6. The record is displayed - click the '[edit this record](#)' link found at the end of the record
7. [Edit](#) the record as required, pressing 'submit' or 'save changes' to 'save and publish' the record
8. When you've finished editing a record, use the menu on the left hand side to return to 'Editor Home' and do more editing, or logout if you have finished all your editing.

Tip use the '%' character as a wildcard when searching e.g. "portrait%" to get most relevant records back to choose from. This example would find records with 'portrait' and 'portraiture' in the title.

Tip changes will appear in the editing screens as soon as 'submit' is clicked, however changes may not always immediately appear on searches, such as on the Culture Grid website. (Automated processes will ensure that changes are seen in searches later the same day)

How to delete a collection record

Editors may delete a collection record e.g. if the collection no longer exists or if the record is found to be an exact duplicate of another one, but this should be used cautiously, as this CANNOT be undone.

To delete a whole record use the 'delete' link at the end of the '[edit](#)' form and confirm if you wish to proceed with the deletion.

Annotated forms to create and edit collection records

Below are copies of the online forms to [create](#) or [edit](#) collection records within the Culture Grid. A description of what information should be added to each part of the form is provided in *italics*.

Create form (Annotated)

Create a new Collection record Previously specified Culture Grid details

Containing *The name of the Culture Grid collection the record is in - assigned by Collections Trust*

Data provider: *The name the Culture Grid calls the source of the collection records – assigned by Collections Trust*

Collection record details

Enter values for the appropriate fields below. After submitting this information you will be given the opportunity to add extra information to the record such as audience, subject, etc.

Required information

Identifier *:

Identifier ONLY appears when an editor creates a new Collection record

Create a collection identifier by stating the MDA Code for your institution, plus a unique collection term e.g. "taxidermy"; "portraits" or "photoportraits" e.g the Collection Identifier could be "ABCDEportraits"

Please look up MDA codes for institutions at:

<http://www.collectionstrust.org.uk/mdacodes/all.htm> If a new MDA code is required for you to complete a collection record, please contact culturegrid@collectionstrust.org.uk

Title *:

The name / title of a collection.

This should be the current most common name for a collection and ideally be in the form: 'Institution, Collection' e.g. "The Royal College of Nursing, Collection" or "The Royal College of Nursing, Portraits Collection"



Description:

Clear and concise information describing the nature and scope of a collection; highlight its strengths and usefulness to its main audiences. Try to limit descriptions to a couple of short paragraphs

Descriptions could also include relevant terms such as:

- *Names of the main/significant people or organisations represented e.g. creators and / or famous people/organisations*
- *The range of media in the collection e.g. 'photographs, paintings, scientific papers, music manuscripts'*
- *Dates covered by the collection, ideally with a start and end date e.g. '01/01/1842 to 31/12/1974'*
- *Places that the collection is about or most relevant to, e.g. Yorkshire; Cowdenbeath*
- *major items/works in the collection*

Linking to an institution address

ONLY collections that have the same address details as an institution should be linked to an institution address.

Selecting 'link to an institution' will automatically assign institution address information to the collection.

To do this:

1. *Tick the 'Link to institution' box (you will then see a 'search box' you can use to find the right institution (see screen shot A)*
2. *Do a search on title by entering a term and pressing 'search' (use "%" to do a broad search e.g. "Nott%" should find "Nottingham" and "Nottinghamshire" etc).*
3. *Select the correct institution to link to by ticking the button*
4. *Continue filling in the other parts of the form*

Tip *If you do NOT find an appropriate institution inform culturegrid@collectionstrust.org.uk of the institution(s) you require adding and they will be added for you asap.*

Tip If the contact-address details of a collection are different to the institution address details, then do NOT link the institution and use the parts of the form shown below to complete the address details which are unique to the collection. (These parts of the form will not appear if you choose to 'link to institution')

Link to institution (and get address details from there)?

Address details

ONLY use this section of the form to enter address details for the collection, if you are creating a new collection record and the collection has address details that are **different** from its institution

Postcode:

The post code specific to the collection

PO Box:

A PO Box number specific to the collection, if there is one

Street addresses:

The street address e.g. "No 10" or "Blah House" specific to the collection

Locality:

A '2nd line' address location specific to the collection, if there is one

Town:

The town part of the address specific to the collection

County:

The county part of the address specific to the collection

Country:

Use a standard country code e.g. "UK" or name e.g. "United Kingdom"

The next part of the form is for you to provide the main contact details for the collection

Contact information

Email:

The main email contact for the collection if there is one (usually not a personal email e.g. info@collection or collection@institution)

Fax:

The main fax contact for the collection if there is one

Phone:

The main phone contact for the collection if there is one

Additional information

The parts of the form above are the most essential parts to complete before submitting a record to be saved and published as they give people the basic information to find a collection and assess its relevance to them. The Additional Information below and in the [edit](#) form offers more detail about the collection and access to it. The more information that is provided, the more useful the record will be.

Access conditions:

Brief general access conditions e.g. 'open to all' or 'open to all on request' or 'restricted access to members only'

*(Things such as opening hours, usage conditions and disabled access can be added later, as part of more detailed **additional** information, so it is best to keep the above brief.)*

Disabled access:

Disability access details, if any, for the collection e.g. "Access via Lift" or "Braille guide available" or state a web address (URL) for further detailed information regarding disability access or disability access policies for the collection / institution.

Format:

The main format or media of items within the collection e.g. Paintings or antique clocks or soil specimens. If entering more than one format or media, use commas between each e.g. 'works of art, scientific papers'

Language:

The main language applicable to the collection, especially if it is NOT English e.g. Spanish or Hindi

License:

ONLY use if there is a formal Licence document governing use of a collection. If the collection has such a licence, state its name and preferably a web address (URL) if there is one. If a collection is not governed by a formal licence, then the "usage" part of this form can be used to let people know about permitted uses of a collection.

License text:

ONLY use if there is a formal Licence governing use of a collection. State the general terms of the licence or a web address (URL) if there is one

Operational hours:

The normal times at which a collection can be accessed or a web address (URL) that provides current information on 'opening hours' for the collection

Owner:

The owner of the collection, usually an institution or individual

Rights:

A general rights statement governing the collection or provide a web address (URL) giving rights statement governing the collection.



Rights holder:

The name of the rights holder/owner for the collection as a whole

Source:

The source of the collection e.g. the provider of the collection as a whole if there is one e.g. donor name

Thumbnail URL:

A web address (URL) for a small image that represents the collection as a whole e.g. a logo or other image, (so that this may appear alongside collections information within search results)

Usage conditions:

The conditions governing use of the collection, e.g. 'the collection may be used for educational and research purposes or a web address (URL) where terms and conditions of use are available.

If use of a collection is governed by a formal licence agreement, use the licence part of the form

Culture Grid specific information

Related link:

The web address (URL) for the most relevant webpage for the collection, e.g. a page about the collection on your own website

Note there is a 'See Also' part of the 'edit' form which can be used to add more related links e.g. web addresses (URL) of online catalogues related to the collection

This is the end of all the information that you can initially provide when creating a new collection record

*Press 'submit' to save and publish the information. Once you have pressed submit, you can choose to carry on editing the record and adding further **additional** information (as per [edit form](#) below) if you wish. The more information you can provide the better audiences can match your collection to their needs.*

Submit

Edit form (Annotated)

When you edit an existing record, (rather than create one) the form will appear as per below, with some parts already filled in and some still blank. Most parts of the form can simply be changed by rewriting what is there already.

Collection record editing

Culture Grid specific information

Resource id: *(The identifier that the Culture Grid system assigns to the record)*

Containing *The name of the Culture Grid collections the record is in (assigned by Collections collections: Trust)*

Related link:

The web address (URL) for the most relevant webpage for the collection, e.g. a page about the collection on your own website

Collection record details

Required information

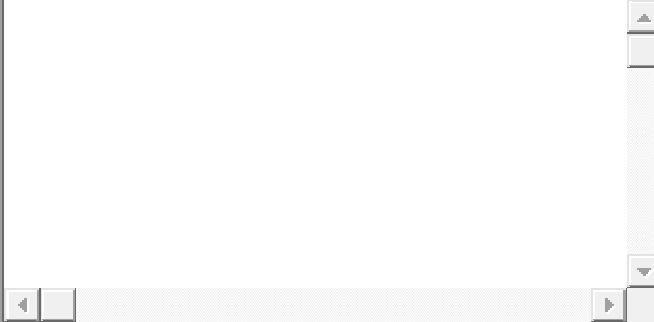
External ABCDEPortraits *(The 'collection code' that was assigned to a collection when the record identifier: was created)*

Title *:

The name / title of a collection.

This should be the current most common name for a collection and ideally be in the form: 'Institution, Collection' e.g. "The Royal College of Nursing, Collection" or "The Royal College of Nursing, Portraits Collection"

Description:



Clear and concise information describing the nature and scope of a collection; highlight its strengths and usefulness to its main audiences. Try to limit descriptions to a couple of short paragraphs

Descriptions could also include relevant terms such as:

- *Names of the main/significant people or organisations represented e.g. creators and / or famous people/organisations*
- *The range of media in the collection e.g. 'photographs, paintings, scientific papers, music manuscripts'*
- *Dates covered by the collection, ideally with a start and end date e.g. '01/01/1842 to 31/12/1974'*
- *Places that the collection is about or most relevant to, e.g. Yorkshire; Cowdenbeath*

major items/works in the collection

Address details

Address The address information for this collection is managed by the institution with which it is associated

The note above will appear if the collection address has been linked to an institution address. The institution it has been linked to will appear below in the 'Associated Institution' part of the form (where it can be changed if required)

Contact details

Email:

The main email contact for the collection if there is one (usually not a personal email e.g. info@collection or collection@institution)

Fax:

The main fax contact for the collection if there is one

Phone:

The main phone contact for the collection if there is one

Additional information

The parts of the form above are the most essential parts to complete for a collection record as they give people the basic information to find a collection and assess its relevance to them. The Additional Information below offers more detail about the collection and access to it. The more information that is provided, the more useful the record will be.

Access conditions:

Brief general access conditions e.g. 'open to all' or 'open to all on request' or 'restricted access to members only'

*(Things such as opening hours, usage conditions and disabled access can be added later, as part of more detailed **additional** information, so it is best to keep the above brief.)*

Disabled access:

Disability access details, if any, for the collection e.g. "Access via Lift" or "Braille guide available" or state a web address (URL) for further detailed information regarding disability access or disability access policies for the collection / institution

Format:

The main format or media of items within the collection e.g. Paintings or antique clocks or soil specimens. If entering more than one format or media, use commas between

each e.g. 'works of art, scientific papers'

Language:

The main language applicable to the collection, especially if it is NOT English e.g. Spanish or Hindi

License:

ONLY use if there is a formal Licence document governing use of a collection. If the collection has such a licence, state its name and preferably a web address (URL) if there is one. If a collection is not governed by a formal licence, then the "usage" part of this form can be used to let people know about permitted uses of a collection.

License text:

ONLY use if there is a formal Licence governing use of a collection. State the general terms of the licence or a web address (URL) if there is one

Operational hours:

The normal times at which a collection can be accessed or a web address (URL) that provides current information on 'opening hours' for the collection

Owner:

The owner of the collection, usually an institution or individual

Rights:

A general rights statement governing the collection or a web address (URL giving rights statement governing the collection.

Rights holder:

The name of the rights holder/owner for the collection as a whole

Source:

The source of the collection e.g. the provider of the collection as a whole if there is one e.g. donor name

Thumbnail /
Logo URL:

A web address (URL) for a small image that represents the collection as a whole e.g. a logo or other image, (so that this may appear alongside collections information within search results)

Usage
conditions:

The conditions governing use of the collection, e.g. 'the collection may be used for educational and research purposes or a web address (URL) where terms and conditions of use are available.

If use of a collection is governed by a formal licence agreement, use the licence part of the form

Associated institution

This part of the [edit](#) form appears if a collection has its address linked to an institution. If you need to change the institution a collection is linked to follow the steps belows

1. Do a search on title by entering a term and pressing 'search' (use "%" to do a broad search e.g. "Nott%" should find "Nottingham" and "Nottinghamshire" etc).
2. Select the correct institution to link to by ticking the button
3. Press 'Save Changes' (This will confirm changes are made and you may then choose to continue editing and filling in the other parts of the form)

Tip If you do NOT find an appropriate institution inform culturegrid@collectionstrust.org.uk of the institution(s) you require adding and they will be added for you asap

IS:2027 - Birmingham Museums and Art Gallery - [Click to view this institution](#)

Search institution titles for:

Save changes

The next section of the [edit](#) form below requires single terms to be entered one at a time for things like audience relevance, subject, temporal and spatial coverage of the collection

Each time you add a term by pressing 'add value' you can then choose to continue editing to add more terms.

Added terms are displayed on the [edit](#) form and you may use the "[remove](#)" link to delete terms if required.

If no terms are yet entered this will be indicated by a note saying "none attached"

Audience

The collection has the following audience values associated with it:

- None attached

Add another audience value:

Audience

*:

The types of people who would be most interested in the collection or most expected to make use of the collection e.g. teachers, learners, researchers, local or family historians, micro-biologists etc

Add value

Other identifiers

The collection has the following other identifiers associated with it:

- None attached

Add an additional other identifier:

Identification
scheme *:

Identifier *:

If a collection has another identifier associated with it e.g. a code the institution calls it or DOMUS number, enter the name of the id scheme e.g. DOMUS and the actual identifier e.g. 12345

Add value

See also

The collection has the following 'see also' values associated with it:

- None attached

Add another 'see also' value:

See also *:

Any related other collections or catalogues, preferably as a web address (URL)

Add value

Spatial

The collection has the following spatial values associated with it:

- None attached

Add another spatial value:

Spatial
*:

Geographic coverage information about the collection e.g. Country, region; city/town;

Add value

Subject

The collection has the following subjects associated with it:

- None attached

Add another subject:

Subject
*:

State subject terms. You may use controlled subject term lists such as the Library of Congress Subject Headings or a more specific controlled term list for the collections subject area

Add value

Temporal

The collection has the following temporal values associated with it:

- None attached

Add another temporal value:

Temporal
*:

Time periods covered by the collection or which the collection specialises in. Ideally include a 'start' and 'end' date e.g. 01/01/1960 – 31/12/1960 or '20th Century; 1960s etc

Add value

Type



The collection has the following types associated with it:

- None attached

Add another type value:

Type *:

The types of things included within the collection such as 'Paintings'

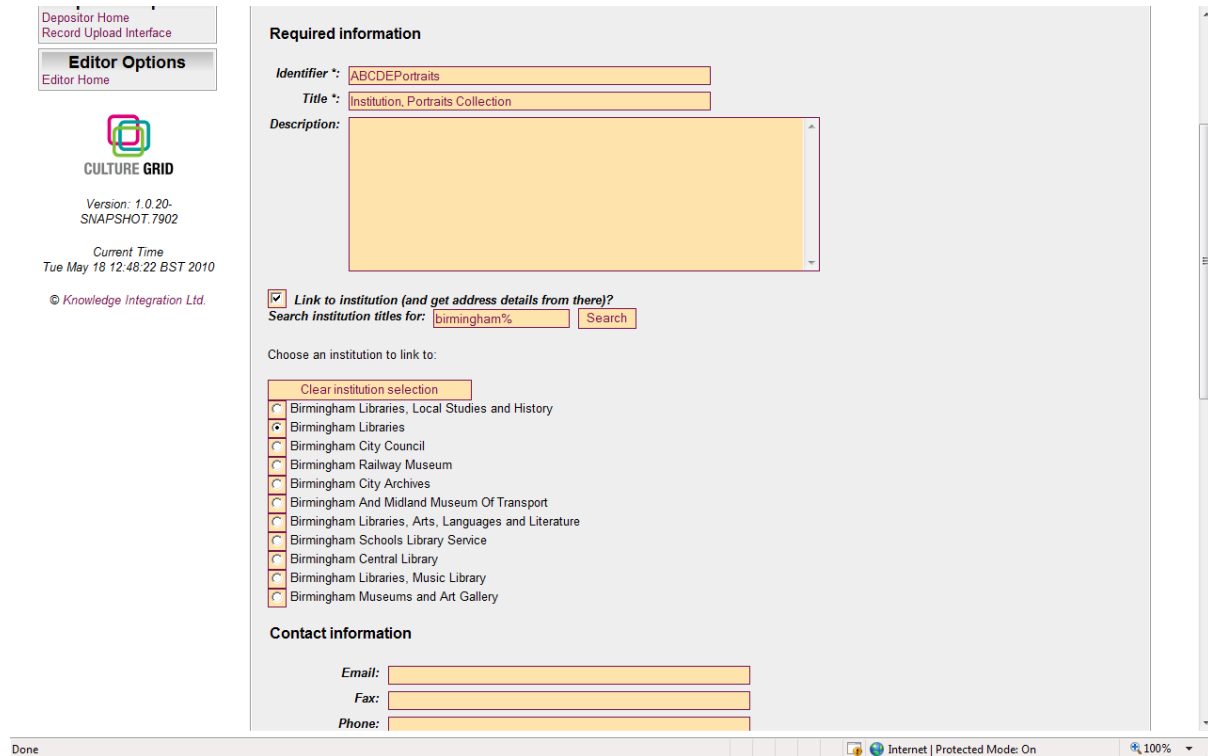
Add value

Record deletion

Delete this record - Click here to delete the current record - Note this completely removes the record from the system and **cannot** be undone.

*Note this completely removes the record from the system and ***cannot*** be undone, so use with care! If you do accidentally delete a record please notify culturegrid@collectionstrust.org.uk*

Screen Shot A: Searching & selecting institutions to link to Collections records



The screenshot displays the 'Record Upload Interface' with a sidebar on the left and a main content area. The sidebar includes a 'Depositor Home' link, 'Editor Options', the 'CULTURE GRID' logo, version information (1.0.20-SNAPSHOT.7902), current time (Tue May 18 12:48:22 BST 2010), and copyright notice (© Knowledge Integration Ltd.).

The main content area is titled 'Required information' and contains the following fields:

- Identifier *:** ABCDEPortraits
- Title *:** Institution, Portraits Collection
- Description:** A large empty text area.

Below these fields, there is a checkbox labeled 'Link to institution (and get address details from there)?' which is checked. Underneath, there is a search box with the text 'Search institution titles for: birmingham%' and a 'Search' button.

The section 'Choose an institution to link to:' contains a 'Clear institution selection' button and a list of institutions with radio buttons:

- Birmingham Libraries, Local Studies and History
- Birmingham Libraries
- Birmingham City Council
- Birmingham Railway Museum
- Birmingham City Archives
- Birmingham And Midland Museum Of Transport
- Birmingham Libraries, Arts, Languages and Literature
- Birmingham Schools Library Service
- Birmingham Central Library
- Birmingham Libraries, Music Library
- Birmingham Museums and Art Gallery

The 'Contact information' section at the bottom has three empty input fields for 'Email:', 'Fax:', and 'Phone:'.

The browser's status bar at the bottom shows 'Done', 'Internet | Protected Mode: On', and '100%' zoom level.