# Collectify Help

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# Getting started

## Using Collectify help

Welcome to Collectify's help system. Use this help system to find answers to your questions about Collectify.

### Navigating around Collectify help

Here are some tips about navigating around Collectify Help.

- To browse through Collectify Help, click the **Contents** tab at left. Next, double-click on a book ![book icon] to open it, then click on a help topic ![topic icon] .
- Click the **Back** ![Back button] button at the top of the window to return to the previous screen.
- To search for a topic by keyword, click the **Index** tab at left. Next, type in a keyword for the topic or scroll down the list.
- To search all the topics in the help system for a word or phrase, click the **Search** tab at left. Next, type in any word or phrase and click **List Topics**.
- Click the mouse on a link (a purple or blue underlined phrase) to jump to a new section of the help system or view a pop-up window. For example, here are links to What can you do with Collectify? and Navigating the homepage.
- Click the **See Also** button at the end of most help topics for a list of quick links to related topics.
- Come across an unfamiliar term or phrase? Click the **Glossary** tab, at left, to browse through a glossary of terms related to Collectify.

### Additional Collectify documentation

Additional Collectify documentation is available in Acrobat PDF format.

- A PDF version of on-line help is available on your installation CD in **\guide\userguide.pdf**.
- A PDF version of the Quick Start guide is available on your installation CD in **\guide\quickstart.pdf**.
- A PDF version of the one-page Quick Start card is available on your desktop and on your installation CD in **\guide\quickcard.pdf**.

## Installing and setting up Collectify

### Installing Collectify

Installing Collectify is a simple process that should take less than 10 minutes.

Before you begin, check that your computer will be able to run Collectify.

- Microsoft Windows 95, 98, ME, NT 4.0 (SP6) , 2000 or XP
- A Pentium 166 MHz or higher processor
- 32 MB RAM minimum, 64 MB RAM recommended (128 MB RAM for Windows 2000)
- 35 MB hard drive space minimum, 100 MB hard drive space recommended
- 800 x 600 display resolution or higher, with High Color (16-bit) video or higher

- A CD-ROM drive
- Microsoft Internet Explorer 5.0 or above (available on the Collectify installation CD)
- Scanner or digital camera optional (TWAIN-compliant)

### ① **How do I check whether I have enough free disk space?**

On your desktop, double-click on the **My Computer** icon ![icon], then right-click on your hard disk icon ![icon] and click **Properties**. In the properties dialog, **Free space:** indicates the amount of free space left on your hard disk.

To install Collectify, simply insert the Collectify installation CD in your CD-ROM drive. Collectify's installation program should start automatically.

### ① **What if installation does not start automatically?**

To start Collectify's installation program manually, click **Start** on the Taskbar, then **Run**. In the **Run** dialog box, type **D:\cdstart.exe** (or replace **D:** with the drive letter of your CD-ROM) and click **OK**.

It may take some time for the Collectify installation menu to appear. If you do not have Microsoft Internet Explorer 5.0 (or above) on your computer already, you should click **Install Microsoft Internet Explorer** on the menu before installing the Collectify program.

You can also view this Quick Start guide online in PDF format. To do this, click **View Collectify Quick Start Guide (PDF)**. You will need Adobe Acrobat to view the Quick Start guide; if you do not already have that program installed, click **Install Adobe Acrobat**.

When you are ready to install Collectify, click **Install Collectify**. When the InstallShield Wizard appears (see figure below), click **Next >**.
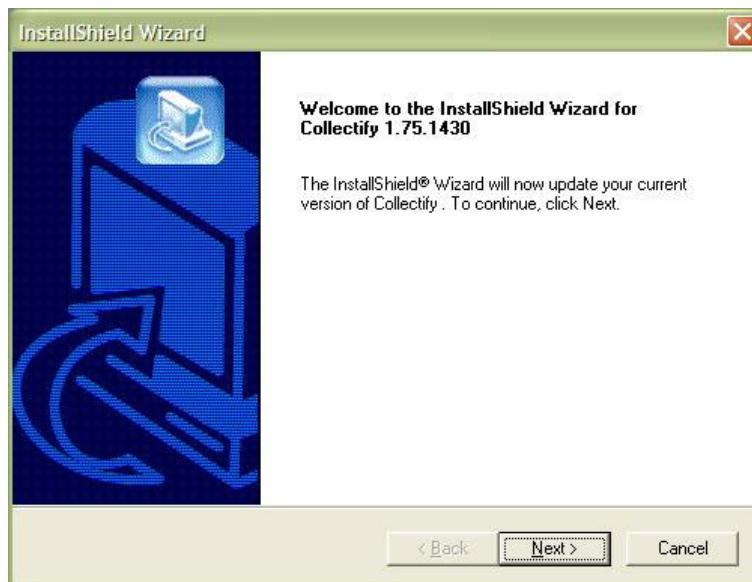


In the next step, enter the information requested: your name, company name (if none, simply use your name) and serial number. Complete the remaining steps in the Wizard. Some

installations may require you to restart your computer. When you are done, you can start using Collectify right away (see Starting Collectify).

**ⓘ How do I uninstall Collectify?**

The Collectify program can be permanently removed from your computer if you do not wish to use it anymore. To do this, click the **Start** button on the Windows Taskbar (usually at the bottom of your display), then **Settings**, then **Control Panel**. In the Control Panel window, double-click **Add/Remove Programs**, then click the **Install/Uninstall** tab. Select **Collectify** from the list, then click the **Add/Remove button** and follow the on-screen instructions.

## Starting Collectify

To start Collectify, double-click the Collectify icon on the desktop. Alternatively, click **Start** on the Taskbar, then **Programs**, then click **Collectify**.

Whenever you start Collectify, the Login window appears (see figure). This window enables you to log in to an existing Collectify database or add a new database.



The Login window has three tabs.

- Use the Login tab to open the database named in the window. Typically, this is the database you were working with the last time you used Collectify. In the figure, the Login tab asks you to open the Collectify Sample Database.

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To log in to a database, first type a username or click the ▼ button at right and select one of the usernames set up for the database. Next, type the correct password for that username and click **OK**.

> **Tip:** The first time you start Collectify, you will be asked to log in to the Collectify Sample database that comes with it. Simply click the **LOGIN** button to do this, since the default login is "Sample User" and there is no password. For more information, see Getting started with the sample database.

- Use the Open tab to log in to another database. The Open tab displays a list of databases in your usual databases directory. Simply click the database you would like to open and click **Open**. To open a database from another directory, such as a network drive, click **Browse** and browse to that directory, then click **Open**. Next, the **Login** tab appears for the database you have chosen. To delete a database, click on it and click **Delete**. You can change databases after you have logged in by clicking **File** on the menubar, then **Open Database**.
- Use the **New** tab to add a new database entirely from scratch. Click the **New Database** button to start the New Database Wizard (see Adding a new database).

Once you have logged in to a database, the homepage for that database will appear (see Navigating the homepage).

## Adding a new database

Collectify comes with a sample database called Collectify Sample. Use this database to play around with Collectify and learn what it can do. But before you can begin using Collectify to catalog your own objects, you will need to set up a new Collectify database.

A database is a virtual space within Collectify in which information about objects is stored and organized. Most users will only need to set up one new database of their own "stuff" (this is in addition to the Sample database).

Use the New Database Wizard to set up a new Collectify database. You can start the New Database Wizard from the Login window by clicking the **Create** tab, then **NEW DATABASE**. After you have opened a Collectify database, you can start a new database by clicking **File** on the menubar at the top of the screen, then **New Database...**.

The New Database Wizard guides you through the steps of setting up a new database. Simply follow the on-screen instructions. When you are done, the Login window appears for the database you have just added.

### ⓘ **When should I set up more than one database?**

For most collectors, we recommend using a single Collectify database. The advantage of using one database is that it makes it easy to find and update information about objects, contacts and other items. We do not recommend that you catalog your own objects in Collectify's sample database, but rather that you add a new database.

You should use only one database even if the objects you are cataloging are in different locations, such as home and cottage. Use Virtual Catalogs to group objects by location or by other characteristics.

Generally, you should use multiple databases if the objects you are cataloging belong to different people or companies. For example, if objects at your office are owned by a company

while objects at home are owned privately, use two database files, one for each location. If you manage other people's objects, use a database file for each person.

## Using Collectify

### Navigating the homepage

Collectify's homepage gives you a snapshot of your database along with quick access to many of Collectify's windows and features. It's the place to start most common tasks, such as adding a new object, searching your database for information, and accessing Online Services.

The homepage is the first page you see after you start up Collectify and log in to a database.

You can get back to the homepage at any time by clicking the **Home** button on the toolbar.

The figure below shows a sample homepage. The homepage is divided into sections (List, Add a New, etc.). Click the arrow to the right of a section title to see the contents of that section, and click the arrow to see only the section title. The removes that section from the homepage. Click on a section in the figure below for more information about it.

What you see on the homepage is completely customizable. The basic homepage is shown above. The complete homepage shows additional information about items in your database, Virtual Catalogs, statistics related to your database and more. To display the complete homepage, click **Complete** in the **Choose a view** drop-down on the upper right side.

You can further customize the homepage by clicking **Personalize** at the upper right side. See Personalizing the homepage for more information.

## Navigating catalog windows

You use catalog windows the vast majority of the time you are using Collectify. The figure below shows a sample catalog window with the main areas of the window labeled. For information about an area of the window, click on that area.



Catalog windows always display a menubar, toolbar and status bar, as indicated in the figure. Catalog windows also always display the Collectify Explorer. This feature is described in Using Collectify Explorer.

The Record and List Viewer portion of the window shows information about one or more items in your database.

- In List views, this area displays information about lists of items. This feature is described in Viewing lists of items.

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- In Record views, this area displays more detailed information about a single item. This feature is described in Viewing item records.

How catalog windows look can be customized in several ways.

- You can change the width of the Collectify Explorer by clicking and dragging the vertical bar on the right side of the Collectify Explorer. You can hide and display the Collectify Explorer by clicking the vertical button on the right side of the Collectify Explorer
- You can change the width of the two parts of the Record and List Viewer by clicking and dragging the vertical bar that separates the two parts of the viewer.
- You can change the color scheme in the Record and List Viewer (see display themes).
- You can change how the toolbar looks. On the menubar, click **View > Toolbars**. Next, click **Large Icons** or **Small Icons** to change the size of the toolbar buttons, and check **Text labels** to view text labels for the buttons (as shown in the figure above).

## Using Collectify Explorer

Collectify Explorer is located along the left side of all catalog windows. It enables you to navigate throughout your Collectify database in a variety of ways. Collectify Explorer contains three tabs. Click the arrows ▷ or ▽ to open or close a tab.

- The Collection Explorer tab lets you browse your database using an intuitive tree of modules, similar to the folders in Windows Explorer. For more information about the Collection Explorer, see below.
- The Recent Items tab shows a list of up to 25 items you have most recently accessed. Click on an item to return to it.
- The Find tab is where you can do a quick search in your database. Type a word or phrase in the Find box and click **Go**. Find looks only in the module you are currently in (for example, the Objects module in the figure below). To search in other modules, and to do more sophisticated kinds of searches, use the Advanced Find tool.

### Collection Explorer

The Collection Explorer shows all the modules in your database, along with the results from your latest search and a list of Virtual Catalogs you have set up. Click on a module, search results, or Virtual Catalog to open it and display a list of its contents in the List Viewer portion of the screen.

Collectify Help



In the figure above, the Objects module is open, showing the available views. One of these views, Active, is highlighted in the figure. This view shows all the objects in the module that have not been removed from the database in some way or deleted. The contents of the module are displayed in the List Viewer to the right of Collectify Explorer (not shown in the figure).

> **Tip:** The Collection Explorer gives you direct access to modules, allowing you to add or edit information directly in the module (without having to first access the object record linked to that information).

All modules except for the Objects module contain two module views. These module views show the status of the record.

- Active records are records currently in the database.
- Deleted records are records that have been deleted from the database. These records can be restored later.

The Objects module contains these two module views, along with five more: Sold, Gifted/Donated, Bartered, Claimed and Deaccessioned. An object's status determines which module view it is in. See the Objects - Accounting window for more information about object status.

## Personalizing Collectify

Collectify is exceptionally flexible software. You can customize and personalize many aspects of how Collectify works, from the colors it uses to whether it reminds you to make a backup copy of your data.

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- Personalize the colors used in Collectify by choosing a new theme. To do this, click **Tools**, then **Options** on the menubar, then click the **Themes** tab.
- Change the size of the Collectify Explorer and Record Explorer portions of Collectify by clicking and dragging the vertical bars separating these areas.
- Customize how the toolbar looks by clicking **View**, then **Toolbars** on the menubar.
- Customize how lists of items are displayed by clicking **View** on the menubar, then choosing from the list of views available. Alternatively, simply click the [button image] button.
- Personalize how some of the windows in Collectify display their information, including Quick View and Description windows, the Record Explorer, the brief description appearing in the Record Identifier and list headers. To personalize any of these windows, right-click anywhere in the window and clicking **Personalize**.
- Modify the Collection Types that Collectify uses to organize objects by clicking **Tools** on the menubar, then Collection Type Manager.
- Control many other aspects of how Collectify handles data files, backups, images, etc. by clicking **Tools**, then **Options** on the menubar.

## Getting started with the sample database

Collectify comes with a sample database to help you get started, called **Collectify Sample**. The first time you start Collectify you will be asked to log in to the sample database. To do this, simply click the LOGIN button, since the default login is "Sample User" and there is no password.

Use this database to play around with Collectify and learn about what it can do. Don't catalog your own objects in the sample database. For information about adding a new database to catalog your objects, see Adding a new database.

The sample database consists of fictitious objects, along with associated information in the other modules: Creators & Contacts, Insurance Claims, Insurance Policies, Literature, and Valuations.

The best way to become acquainted with Collectify's features and capabilities is to play with the sample database. For example, you can use the homepage and catalog windows to:

- Search for all objects whose country of origin is "USA".
- Add a second bottle of wine *Chateau Bougie Spéciale,* similar to the first except that it is a 1972 vintage and has bottle code L 76 C 23 (see Adding a duplicate object).

## Getting started cataloging objects

Objects–art, memorabilia, CDs, etc.–are the heart and soul of Collectify. Cataloging objects is the first step in using Collectify to enhance your collecting experience.

**Tip:** Before you begin cataloging objects, you must first create your own database in Collectify.

Cataloging objects is accomplished in two steps: adding a new object and, optionally, recording additional information about the object.

**Step 1: Add a new object using the New Object Wizard**

Use the New Object Wizard to add a new object to your database. From the homepage, click **Object** on the **Add a New...** list. Or from any catalog window, click on the **Objects** module in the Collection Explorer, then click the **New** button on the toolbar.

How else can I access the New Object Wizard?

The first step in the New Object Wizard is to choose a Collection Type for the object you wish to catalog (coins, dolls, or musical instruments, for example). You can choose a Collection Type from the available list, or click **New**, **Copy** or **Edit** to launch the Collection Type Editor. Collection Types are how Collectify groups objects and determines which kinds of information are relevant to them. See About Collection Types for more information about working with Collection Types.

You can use the New Object Wizard to record as little or as much information as you wish about a new object. You can click the Finish button at any time, and the Objects • Quick View window will open for the object you have just added.
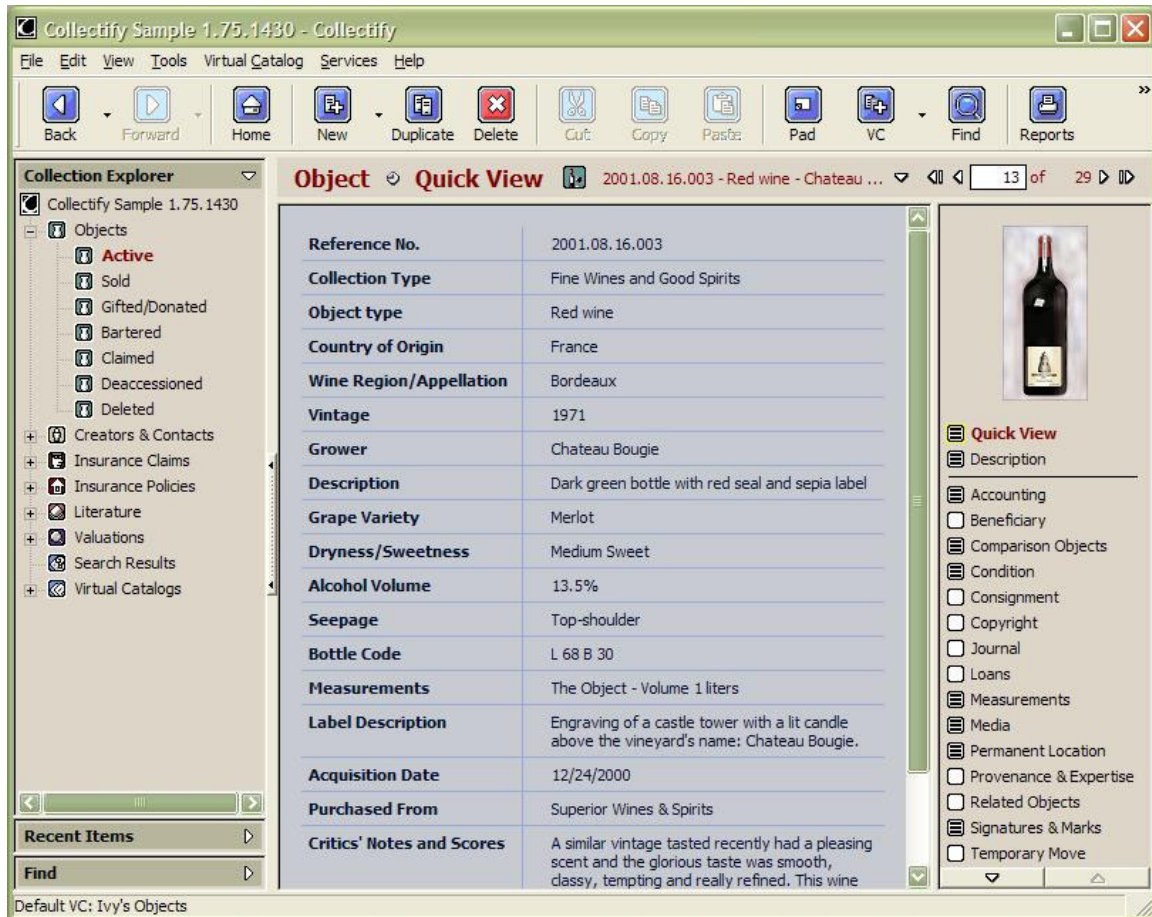


## Step 2: Optionally, add more information about the object

Once you have added a new object to your database you will probably want to add to, or edit, the information you have entered about that object. Collectify's Objects windows give you a handy way to access the variety of categories or fields of information you'll need, as each window manages a different kind of information—Accounting, Beneficiary, Condition, and so on. The Objects • Quick View window shown above is an example of an Objects window. Along

the right-hand side of the window is the Record Explorer listing the other available Objects windows (Quick View, Description, etc.).

Click one of the names in the Record Explorer to access the window used to record that kind of information. For example, click **Condition** to access the Objects • Condition window. The Objects • Condition window enables you to view, add and edit information relating to the condition of the object, including any repairs or treatments the object has undergone and any future treatment plans. The window also enables you to set Collectify to remind you about future treatment plans.

To view a description of the kind of information you should record in each field (box), let the mouse pointer rest anywhere inside the field for a second and a definition will pop up.

Some fields contain drop-down lists, indicated with a ⏷ button. In these fields, you can type the text you want to record or click the button and select on a choice from the list.

Some fields, indicated with , or buttons, enable you to link the current item with a creator/contact, object or insurance policy. Click on the button, then select one from the list.

For more information about recording information, see Overview of recording information in fields.

## Overview of recording information in fields

Collectify includes many tips, tricks and aids to make the process of recording information quick, easy and accurate.

To record information in most fields, simply click anywhere in the field and type the text you want to record.

- Some fields contain drop-down lists, indicated with a ⏷ button. In these fields, you can type the text you want to record or click on the ⏷ button, then click on a choice from the list. The choices in the list can be customized (see Customizing drop-down lists).

- Some fields contain dates. You can type the date directly into the field, or click the ⏷ button and a calendar pops up.
  1. Choose the month using the scroll buttons, or click on the month currently displayed and choose another month from the list.
  2. Choose the day by clicking on it. To jump to today's date, click on today's date at the bottom of the calendar.

One of Collectify's most valuable features is its ability to link any item—literature, insurance information, and so on—with objects, contacts and insurance policies.

- Fields with a button are used to link to objects in the database. Click the button to link to an object (see Linking to objects). Click the button to delete a link in that field.

- Fields with a [icon] button are used to link to creators and contacts. Click the [icon] button to link to a creator, manufacturer or contact (see Linking to creators and contacts). Click the [icon] button to delete a link in that field.

- Fields with a [icon] button are used to link to insurance policies. Click the [icon] button to link to an insurance policy (see Linking to insurance policies). Click the [icon] button to delete a link in that field.

For more information, see Why link items with objects or contacts?

To get a brief description of the kind of information you should record in each field (box), let the mouse pointer rest anywhere inside the field for a few seconds and a balloon tip will pop up. These descriptions are also available in the Data Dictionary.

> **Tip:** You can access Data Dictionary definitions related to a help topic by clicking the **Related Data Dictionary definitions** button in that topic. You can also browse the Data Dictionary by clicking the **Data Dictionary** book in the Table of Contents.

## Getting started with Collection Types

Perhaps Collectify's most powerful and revolutionary feature is its ability to group objects by Collection Type and to enable you to define your own Collection Types–thereby insuring that Collectify records and displays exactly the information you want, in exactly the way you want it.

You will notice immediately that Collectify Collection Types are built around a type of object, such as watches, dolls, furniture, posters, toys, and so on. You can define your own Collection Types in the same manner–My Stamps, My Baseball Cards, My Samplers, etc.

The Collection Type you assign to an object determines so much about how you record and view information about the object. The Collection Type determines...

- ...which icon is used for each object–all your chairs could have the Furniture icon, all dolls the Doll icon, etc.
- ...what cataloging information the New Object Wizard asks for, and in what order.
- ...what information is displayed in the Objects • Quick View window, and in what order.
- ...the order in which fields are displayed in the Objects • Description window.
- ...what the brief description looks like that appears in the Record Identifier (near the top of all Record and List View windows) and elsewhere.

For this reason, it is important to spend some time thinking about which Collection Types you want to use in your database. To make the best use of Collectify features and capabilities you will probably want to develop your own Collection Types, ones that fit the objects in your database like a glove.

For example, you may have a Whisky database–Collectify's "Fine Wines and Spirits" Collection Type can easily be copied and renamed "My Whiskies." You can remove unneeded fields related to grape, seepage, etc., and add custom fields specific to your database.

Sometimes it is best to group items in other ways. Your collection of folk art might include such disparate items as paintings, sculptures, furniture and musical instruments. The simplest thing to do is to catalog these items in their own Collection Types—"Paintings, Drawings and

Sculptures," "Musical Instruments," etc.—and use Collectify's Collection Sub-Type field to group the objects as "Folk Art."

Collectify designers have tried to think of every kind of information anyone would want to record about their objects, from Alcohol Volume to Film Genre to Ruling Dignitary. However, your objects may be best described by a kind of information not already defined in Collectify. Collection Types you create or edit can make use of custom information fields you design.

Collectify's Collection Type Manager, Collection Type Editor and Custom Field dialog make it easy to create and edit Collection types.

## What can you do with Collectify?

You can use Collectify simply to catalog objects in your database. You can also use Collectify to make almost any collecting activity—buying, selling, trading, tracking, researching, valuing, insuring, archiving, planning, comparing—quicker, easier and more enjoyable. You can even use Collectify to do things with your collection you couldn't do before, such as using keywords to search for information about your collection.

- Cataloging objects is the first step in building your Collectify database. (Click here for more.)
- Collectify's Virtual Catalog feature assists you in creating groupings or lists of objects in your database—V*irtual Catalogs*—that are useful and interesting. (Click here for more.)
- Collectify stores and organizes information about the many people and companies related to your collecting activities, from manufacturers and creators to couriers and insurance brokers. (Click here for more.)
- Collectify enables you to store, organize and search any kind of literature related to your collection. (Click here for more.)
- Collectify helps you organize appraisal and other valuation information pertaining to objects in your collection. (Click here for more.)
- Collectify keeps track of insurance information, and Collectify helps you handle the myriad details involved in making an insurance claim. (Click here for more.)

## How does Collectify work?

Collectify enables you to add, modify, search and organize information about objects in your database. Instead of storing this information in a filing cabinet and accessing it by opening up a file drawer and removing a file, this information is stored on your computer's hard disk and accessed by means of the Collectify program.

Throughout this help system and the Collectify program itself, certain words are used in new ways. Some of these will be familiar. For example, the terms "desktop" and "window" don't have their usual meaning, but rather refer to aspects of the computer program that are suggestively analogous to desktops (made of wood) and windows (made of glass).

Three important terms that are new in Collectify are *database, module* and *object*.

- D*atabase* refers to *all* the information related to the physical objects you own and use Collectify to store and organize. Each database is stored on your hard disk in a database.(Click here for more.)
- The term *module* refers to an assortment of information within a database that is similar in nature. For example, all the information related to appraisals and other valuations is contained in the Valuations module. Collectify organizes information into

six modules: Objects, Creators & Contacts, Insurance Policies, Insurance Claims, Literature and Valuations. (Click here for more.)

- An *object* (or *object record*) is an assortment of information related to a specific physical article that you own. (Click here for more.)

When you open a database, such as Collectify Sample, the Collectify program accesses the database containing that database (see figure below). You can then view the objects (object records) in that database. Each time you make a change to your database, Collectify automatically records the changes in the database. You may choose to have more than one database, but Collectify can access only one database at a time.
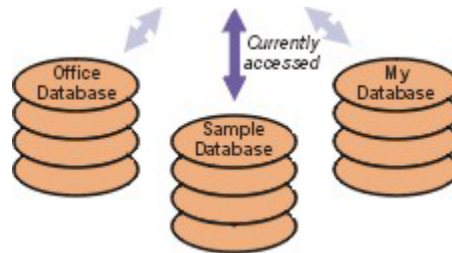


## Frequently asked questions

For an answer to any of the questions below, click on that question.

### Why is there no "Save" button?

Collectify automatically saves your changes as you work. Whenever you make changes in Collectify, such as adding a new object or updating an address for a contact, that information is immediately recorded to your computer's hard disk. Should your computer suddenly turn off (due to a power failure, for example), all the changes you have made in your database will be saved, except perhaps for those made in the few seconds before the computer turned off.

### When should I set up more than one database?

For most collectors, we recommend using a single Collectify database. The advantage of using one database is that it makes it easy to find and update information about objects, contacts and other items. We do not recommend that you use the Collectify Sample database to catalog your own objects, but rather that you add a new database (see Adding a new database).

You should use only one database even if the objects you are cataloging are in different locations, such as home and cottage. Use Virtual Catalogs to group objects by location or by other characteristics.

Generally, you should use multiple databases if the objects you are cataloging belong to different people or companies. For example, if objects at your office are owned by a company while objects at home are owned privately, use two database files, one for each location. If you manage other people's objects, use a database file for each person.

You may choose to have more than one database, but Collectify can access only one database at a time.

### How do I import images or scans into Collectify?

It's easy, using the Media window for the item (object, etc.) to which you want to add a digital image.

Digital cameras and scanners are the two most common ways to create digital images. Scanners can be used to make a digital image of a drawing, photograph or work of art. Digital cameras take digital pictures that you can download to your computer. Collectify works directly with these TWAIN-compliant devices: simply plug in your digital camera or scanner and click the Scan Media button in Collectify.

Collectify can handle images in most formats. The image can be downloaded from a scanner or digital camera, or it can be stored in a digital file on your hard disk, a floppy disk, zip disk or CD-ROM. For more information, see About media and images.

**What is the difference between a database and a Collection Type?**

There is a significant difference between a database (or collection database) and the Collection Types used in it. A database refers to all the information related to the physical objects you own, and which you use Collectify to store and organize. Each database is stored on your hard disk in a database. A Collection Type is a descriptive way of grouping objects within your database. Each object is assigned a Collection Type (e.g., "furniture and decorations," "memorabilia" and "prints and photographs").

So although you may own things categorized into different Collection Types, those things are all considered part of a single database.

## Quick Start Card

Click here to view Collectify's Quick Start Card.

# A roadmap of Collectify

## Navigating the homepage

Collectify's homepage gives you a snapshot of your database along with quick access to many of Collectify's windows and features. It's the place to start most common tasks, such as adding a new object, searching your database for information, and accessing Online Services.

The homepage is the first page you see after you start up Collectify and log in to a database.

You can get back to the homepage at any time by clicking the **Home** button on the toolbar.

The figure below shows a sample homepage. The homepage is divided into sections (List, Add a New, etc.). Click the arrow to the right of a section title to see the contents of that section, and click the arrow to see only the section title. The removes that section from the homepage. Click on a section in the figure below for more information about it.



What you see on the homepage is completely customizable. The basic homepage is shown above. The complete homepage shows additional information about items in your database,

Virtual Catalogs, statistics related to your database and more. To display the complete homepage, click **Complete** in the **Choose a view** drop-down on the upper right side.

You can further customize the homepage by clicking **Personalize** at the upper right side. See Personalizing the homepage for more information.

## Personalizing the homepage

Collectify's homepage is customizable, from what information is displayed to the order in which it appears. You can even choose whether or not to show the homepage each time you log in to your database.

To personalize the homepage, click **Personalize** at the upper right corner of the homepage. The Personalize Homepage dialog appears.

First, choose which homepage view you would like to customize from the **View** drop-down list: the basic view, the complete view, or the custom view.

- The Current list shows sections of the homepage that are already displayed on the homepage view, in the order they are displayed. To remove a section from the homepage, click on the section title in the list and click **Remove**. To move a section up on the homepage, click on the section title in the list and click **Move Up**. To move a section down on the homepage, click on the section title in the list and click **Move Down**.
- The Available list shows sections that can be added to the homepage. To add one of these sections to the homepage, click on the section title in the list and click **Add**.

**Tip:** You can also add a section to the homepage by clicking on it in the Available list and dragging it to the Current list. Similarly, you can remove a section from the homepage by clicking on it in the Current list and dragging it to the Available list.

Finally, if you do not want to see the homepage first whenever you log in to your database, then uncheck (clear) the **Display homepage after log in** box.

## Navigating catalog windows

You use catalog windows the vast majority of the time you are using Collectify. The figure below shows a sample catalog window with the main areas of the window labeled. For information about an area of the window, click on that area.

Catalog windows always display a menubar, toolbar and status bar, as indicated in the figure. Catalog windows also always display the Collectify Explorer. This feature is described in Using Collectify Explorer.

The Record and List Viewer portion of the window shows information about one or more items in your database.

- In List views, this area displays information about lists of items. This feature is described in Viewing lists of items.
- In Record views, this area displays more detailed information about a single item. This feature is described in Viewing item records.

How catalog windows look can be customized in several ways.

- You can change the width of the Collectify Explorer by clicking and dragging the vertical bar on the right side of the Collectify Explorer. You can hide and display the Collectify Explorer by clicking the vertical button on the right side of the Collectify Explorer
- You can change the width of the two parts of the Record and List Viewer by clicking and dragging the vertical bar that separates the two parts of the viewer.
- You can change the color scheme in the Record and List Viewer (see display themes).
- You can change how the toolbar looks. On the menubar, click **View > Toolbars**. Next, click **Large Icons** or **Small Icons** to change the size of the toolbar buttons, and check **Text labels** to view text labels for the buttons (as shown in the figure above).

## Using Collectify Explorer

Collectify Explorer is located along the left side of all catalog windows. It enables you to navigate throughout your Collectify database in a variety of ways. Collectify Explorer contains three tabs. Click the arrows ▷ or ▽ to open or close a tab.

- The Collection Explorer tab lets you browse your database using an intuitive tree of modules, similar to the folders in Windows Explorer. For more information about the Collection Explorer, see below.
- The Recent Items tab shows a list of up to 25 items you have most recently accessed. Click on an item to return to it.
- The Find tab is where you can do a quick search in your database. Type a word or phrase in the Find box and click **Go**. Find looks only in the module you are currently in (for example, the Objects module in the figure below). To search in other modules, and to do more sophisticated kinds of searches, use the Advanced Find tool.

## Collection Explorer

The Collection Explorer shows all the modules in your database, along with the results from your latest search and a list of Virtual Catalogs you have set up. Click on a module, search results, or Virtual Catalog to open it and display a list of its contents in the List Viewer portion of the screen.



In the figure above, the Objects module is open, showing the available views. One of these views, Active, is highlighted in the figure. This view shows all the objects in the module that have not been removed from the database in some way or deleted. The contents of the

module are displayed in the List Viewer to the right of Collectify Explorer (not shown in the figure).

> **Tip:** The Collection Explorer gives you direct access to modules, allowing you to add or edit information directly in the module (without having to first access the object record linked to that information).

All modules except for the Objects module contain two module views. These module views show the status of the record.

- Active records are records currently in the database.
- Deleted records are records that have been deleted from the database. These records can be restored later.

The Objects module contains these two module views, along with five more: Sold, Gifted/Donated, Bartered, Claimed and Deaccessioned. An object's status determines which module view it is in. See the Objects - Accounting window for more information about object status.

## Viewing lists of items

## Viewing lists of items

Catalog windows often display lists of items. For example, the figure below lists all the active objects in the database.

- The Record Identifier displays information about the Viewer Window and the current record. For more information, see the Record Identifier.
- The Record Explorer displays a summary of information about the item highlighted in the Viewer Window. If a thumbnail image has been associated with the item, that image is displayed at the top of the Record Explorer. For more information, see the Record Explorer.
- The Viewer Window displays a list of items or module views open in the Collection Explorer, such as the contents of a module, the contents of a Virtual Catalog, or the results of the latest search. The Viewer Window can display lists in a variety of formats. For more information, see the Viewer Window.

When you click on an item in the Viewer Window, the Record Explorer displays a snapshot of information about the item. When you double-click on an item, the Viewer Window switches to Record View and displays more detailed information about only that item. This feature is described in Viewing item records.
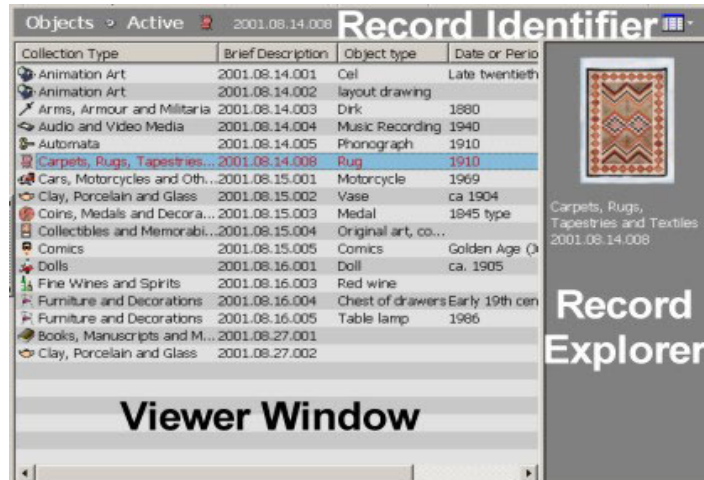
## Viewer Window in List view

The Viewer Window displays a list of items or module views open in the Collection Explorer, such as the contents of a module, the contents of a Virtual Catalog, or the results of the latest search.

When you click on an item in the Viewer Window, the Record Explorer displays a snapshot of information about the item. When you double-click on an item, the Viewer Window switches to Record View and displays more detailed information about only that item. This feature is described in Viewing item records.
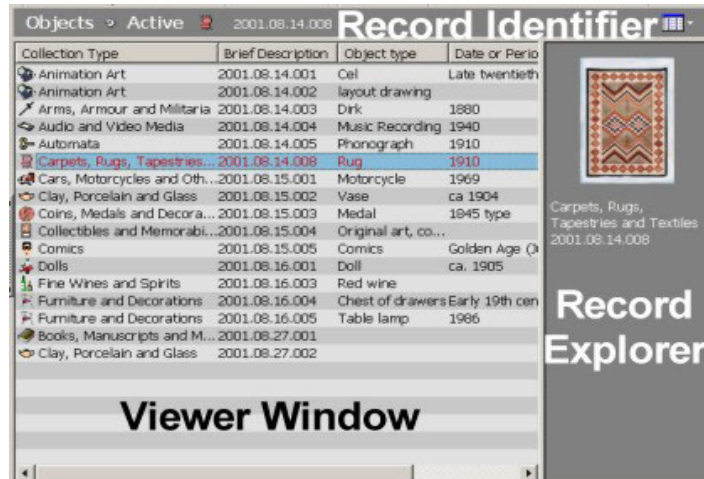


The Viewer Window can display lists in a variety of formats. To choose which of the formats to display in the Viewer Window, either click the **list selector** button in the Record Identifier or click the **View** button on the toolbar and select from the list:

- The Large Icons view, shown in the figure above, shows a large icon and brief caption for each item in the module.
- The Small Icons view shows a small icon and brief caption for each item in the module.
- The List view shows a small icon and brief caption for each item in the module, arranged in a list with one item per row.

- The Details view shows a small icon and a summary of information about the item, arranged in a list with one item per row. You can customize this view to display information that is useful to you, as explained in Customizing the details view.
- In the Thumbnails view, if a thumbnail image has been associated with the item, that image is displayed with a brief caption. If no thumbnail is available, a large icon is displayed.

> **Tip:** The **Delete** button on the toolbar enables you to delete the record highlighted in a list. Deleting a record sends it to the "Deleted" section of the module, which acts like a Windows Recycle Bin. You can restore the record from the "Deleted" section, or you can permanently eliminate the record by deleting it from the "Deleted" section.

## Record Identifier in List view

The Record Identifier is located just above the Viewer Window. It displays useful information about the Viewer Window and the current record.
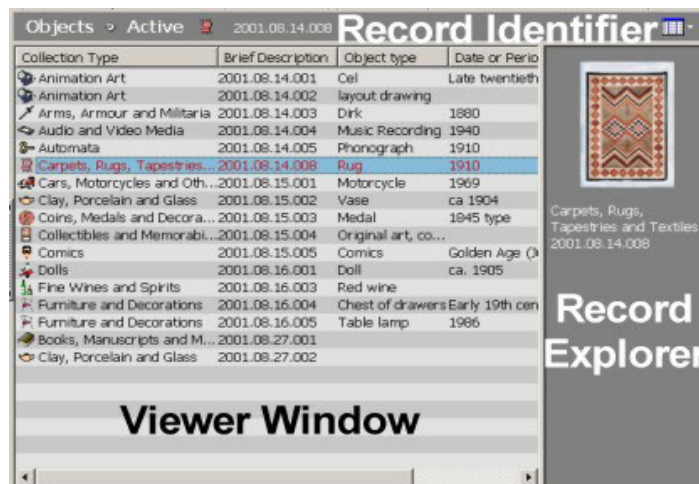


- At left is the name of the module and the module view that is currently being displayed.
- The icon tells you about the type of item that is highlighted (selected) in the list.
- Next comes a brief description of the item. For objects, this description is customizable. To do this, right-click the brief description, then click Personalize. This brings up the Brief Description tab of the Collection Type Editor.
- At right is the **list selector** button. Click this button to choose which of the list views to display in the Viewer Window: Large Icons, Small Icons, List, Details and Thumbnails. These views are described in Viewer Window for list views.

## Record Explorer in List view

When you click on an item in List view, the Record Explorer displays a snapshot of information about the item. If a thumbnail image has been associated with the item, that image is displayed at the top of the Record Explorer.

For objects, the Record Explorer shows the thumbnail image, if any, associated with the object. To associate a thumbnail image with an object, check the **Use as Thumbnail** box in the Objects • Media window (see Recording other information about objects). The Record Explorer also shows summary information about the object as defined in the Record Explorer

tab of the Collection Type Editor (see Using the Collection Type Editor). For all other modules, the Record Explorer shows a predefined selection of information about the object.

For information about using the Record Explorer when viewing a single item (in Record view), see Record Explorer in Record view.

## Customizing the Details List view

You can customize the Details list view of the Viewer Window in several ways.

- You can sort the order in which items are displayed in the Details view. To sort items alphabetically in a column, click on a header label for that column, at the top of the Viewer Window (e.g. **Collection Type**, **Brief Description**, etc.).
- You can resize the widths of columns by clicking and dragging the bars between the header labels (at the top of the Viewer Window).
- You can also customize which kinds of information are displayed and in what order. To do this, right-click in any header label and click **Personalize**. The **List Headers** customization dialog appears (see figure).
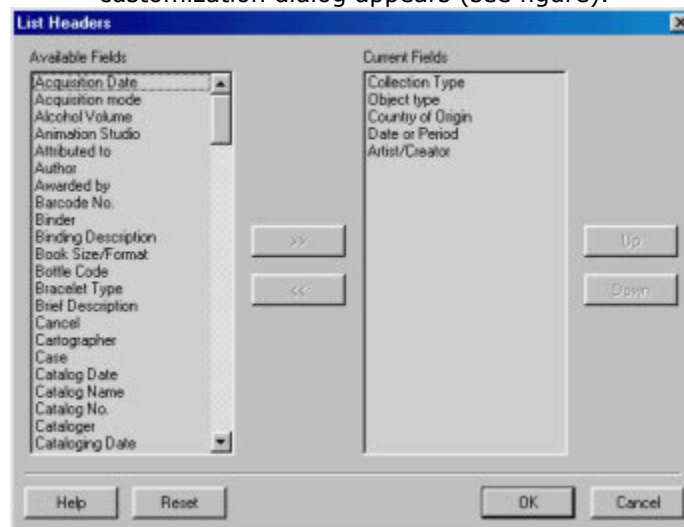


The **Current Categories** list (at right) shows the categories of information currently displayed in the Details view. The **Available Categories** list (at left) shows the categories of information that could be displayed.

- To add a category to the Details view, click on that category in the **Available Categories** list, then click the **>>** button. To remove a category from the Details view, click on that category in the **Current Categories** list, then click the **<<** button.
- To change the order that categories are displayed in the Details view, click on a category in the **Current Categories** list, then click **Up** or **Down** as appropriate.
- To reset the displayed categories to the default list, click **Reset**.

When you are done, click **OK** to return to the List Viewer Window.

## Viewing item records

## Overview of viewing item records

The Record and List Viewer portion of catalog windows shows information about one or more items in your database. In Record views, this area displays detailed information about a single item.

- The Record Identifier displays information about the Viewer Window and the current record. For more information, see the Record Identifier.
- For most items, not all the information about the item can be displayed in a single window. The Record Explorer enables you to view the different kinds of the information in Collectify about the current item. Click on an item in the list to view that information in the Viewer Window. For more information, see the Record Explorer.
- The Viewer Window displays the contents of the window selected in the Record Explorer. For more information, see the Viewer Window in Record view.



## Viewer Window in Record view

The Viewer Window in Record view displays the contents of the window selected in the Record Explorer. The contents of the Viewer Window depends on the module you are in and the window you have chosen in the Record Explorer. Some windows (e.g., the **Literature ● Details** window) present an overview of the item, while others (e.g., the **Objects ● Provenance & Expertise** window) give detailed information about one aspect of the item.

**Tip:** The **Delete** button on the toolbar enables you to delete the record you are currently viewing. Deleting a record sends it to the "Deleted" section of the module, which acts like a Windows Recycle Bin. You can restore the record from the "Deleted" section by right-clicking on it and clicking **Restore**. Alternatively, you can permanently eliminate the record by deleting it from the "Deleted" section.

## Record Identifier in Record view

The Record Identifier is located just above the Viewer Window. It displays useful information about the Viewer Window and the current record.

- At left is the name of the module and the window that is currently being displayed.
- The icon tells you about the type of item being displayed. For objects, it shows the Collection Type, while for all other types of items it shows the module.
- Next comes a brief description of the item. For objects, this description is customizable. To do this, right-click the brief description, then click Personalize. This brings up the Brief Description tab of the Collection Type Editor. Click the down arrow ▽ to obtain a drop-down list of the 10 items before and the ten items after the item you are currently viewing.
- At right are Record Explorer buttons that allow you to browse among the items in the current module view, set of search results or Virtual Catalog. The total number of items are displayed, and you can type a number in the box to jump to a specific item. Click ◁‖ to jump to the first item. Click ◁ to jump to the previous item. Click ▷ to jump to the next item. Click ‖▷ to jump to the last item.

## Record Explorer in Record view

For most items, not all the information about the item can be displayed in a single window. The Record Explorer enables you to view the different kinds of the information in Collectify about the current item.



The Record Explorer displays a list of windows available for the current item. The ▤ icon indicates that the window has information and the ▢ icon indicates that all fields in that window are empty. If a thumbnail image has been associated with the item, that image is displayed at the top of the Record Explorer. To associate a thumbnail image with an object, check the **Use as Thumbnail** box in the Objects • Media window (see Recording additional information about objects).

> ℹ **Tip:** If you use the Record Explorer to jump from an object to a related record in another module (such as a valuation or an insurance claim) and you want to return to the object, click the **Back** button in the toolbar at the top of the Collectify screen.

The list of windows displayed in the Record Explorer depends on the Collection Type. For user-defined Collection Types, the list is completely customizable. See The Collection Type Editor - Record Explorer tab for more information.

# Objects

## About cataloging objects

Cataloging objects is the first step in building your Collectify database. Cataloging an object begins with recording basic descriptive information about it, like what it is, who made it, where it was made, and so on. Using the New Object Wizard will provide you with the basic description fields.

Use the Objects module to store records containing descriptive information about objects and also to link those records with related object records, literature entries, creators and other contacts, and so on. Once you have cataloged an object you can use the Objects module to track changes to that object such as consignments, loans and insurance claims. The Objects module even keeps track of on-line transactions involving objects in your database.

You can link images, audio and video files and other digital media to objects in your Collectify database.

**Tip:** Before you begin cataloging objects, you must first set up a database in Collectify.

### How do I catalog objects?

Cataloging objects involves three kinds of activities.

- Create a new object in your database.**(Click here for more.)**
    - Use the New Object Wizard to record basic descriptive information for your object
    - Or use the New Object Wizard to create a reference number for your object only and add descriptive information at another time.
    - Or click **Duplicate** on the toolbar to duplicate a cataloged object record and give it its own reference number, changing any descriptive information as required.
- Add further information about your object, beyond the description fields available from within the New Object Wizard*.* **(Click here for more.)**
    - Detailed descriptive fields are available for all Collection Types, such as "Barcode number" or "Distinguishing features."
    - Other fields, very specific to particular Collection Types, are also available, such as "Paper Type," "Knot Density," and "Label Description."
    - You can add information about the object's condition, provenance and expertise, signatures and marks, and so on.
    - You can add images related to the object.
- Include information in other modules that is related to the object.**(Click here for more.)**
    - Link to individuals or companies who had a hand in making the object.
    - Create a bibliography with literature references.
    - Link insurance policy and claim information.

### What is an object's Collection Type?

Collection Types are the most important feature Collectify uses to group objects and to determine which kinds of information are relevant to them. It is worthwhile to spend a moment thinking about what Collection Type would suit the object you are cataloging. Perhaps

Collectify's most powerful and revolutionary feature is its ability to group objects by Collection Type and to enable you to define your own Collection Types—thereby insuring that Collectify records and displays exactly the information you want, in exactly the way you want it. For more information, see About Collection Types.

## What is an object's status?

An object's status is its current standing within your database, for example Active, Sold or Deleted. In the Collection Explorer, the Objects module organizes objects into module views, like folders, according to object status. As well, an object's status is listed in the Objects • Description window. By default, all objects added to the database have an Active status. When you delete an object from your database, it moves to Deleted status. The other five status possibilities are determined in the Objects • Accounting window: Sold, Gifted/Donated, Bartered, Claimed and Deaccessioned. See the Objects • Accounting window for more information.

> **Tip:** You can also use Virtual Catalogs to organize objects in your database. See About Virtual Catalogs.

## Using the New Object Wizard

Use the New Object Wizard when you want to create a new object record entirely from scratch. The New Object Wizard guides you through the process of recording information about the object.

> **Tip:** If the new object you wish to add is similar to objects you have already cataloged, you can copy information from a cataloged object. See Adding a duplicate object.

How do I access the New Object Wizard?

1. The first step in the New Object Wizard is to choose a Collection Type for the object you wish to catalog (coins, dolls, or musical instruments, for example). You can choose a Collection Type from the list, or click **Edit** to create or edit a Collection Type. Clicking **Edit** brings up the New Object tab of the Collection Type Editor.

   It is worthwhile to spend a moment thinking about what Collection Type would suit the object you are cataloging. Collection Types are the most important feature Collectify uses to group objects and to determine which kinds of information are relevant to them. See About Collection Types for more information.

   As well, the Collection Type determines what kind of information the remaining steps in the New Object Wizard will ask for. For this reason, the steps involved in the New Object Wizard vary depending on the type of object being cataloged.

2. You can use the New Object Wizard to record as little or as much information as you wish about a new object. You can click the **Finish** button at any time. You will be able to update and add to this information later using Objects windows, as explained in Recording additional information about objects.

In most cases, when you click the **Finish** button the New Object Wizard closes and an Objects • Quick View window appears with the new object information. The only exception to this is when you started the New Object Wizard from the Link to Object dialog. In this case, when you click the **Finish** button, the wizard closes and you are returned to the Link to Object dialog.

## Adding a duplicate object

If the new object you wish to add is similar to objects you have already cataloged, you can copy information from a cataloged object. This saves you the trouble of re-entering information that is the same as (or similar to) information you have already entered.

Use the Duplicate Object dialog to copy information from an existing object to a new object.

1. Select the object you wish to copy information from. You can do this by clicking on the object in any Objects list window or viewing any other Objects window for that object.

2. Click the **Duplicate** button on the toolbar to bring up Duplicate Object dialog (see figure).
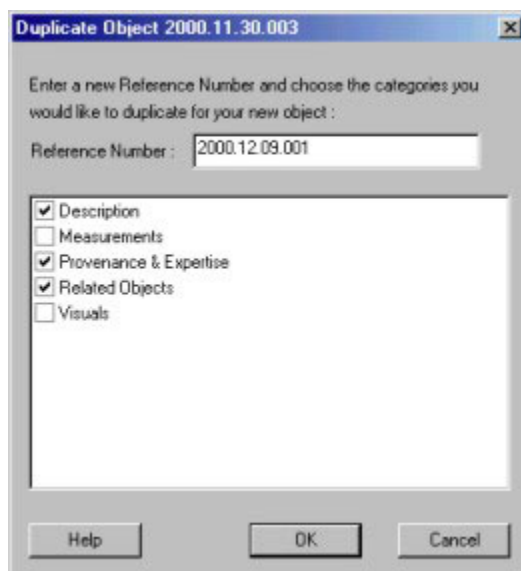


3. Fill in information about the duplicate object.

   The title bar at the top of the dialog shows the reference number of the object you are copying information from (in the figure, this is object 2000.11.30.003).

   In the **Reference Number** field, enter a reference number for the new object or use the default reference number generated by Collectify.

   The large field in the middle of the dialog shows a list of all the categories of information that have been recorded for that object. For example, the figure shows that measurement information has been recorded for the object, while condition information has not (it is not present in the list). Put a check mark (by clicking) in the boxes for the categories that you wish to copy to the new object.

4. Finally, click **OK**. The **Duplicate Object** dialog closes and you are returned to the Quick View window for the new object.

> **Tip:** Unless the new object is identical to the one you are copying information from, you will want to update the record for the new object. See Recording additional information about objects.

## The Quick View window

The Objects • Quick View window displays selected information about the currently selected object—an "executive summary" of all the available information.

You can change the order in which information is displayed by holding down the ALT key, then clicking and dragging a field to a new location.

Unlike most other Objects windows, the Quick View window cannot be used to record information.

By default, the Objects • Quick View window chooses which categories to display, depending on the Collection Type of the object. However, you can easily customize which categories are displayed and what order they are listed in. To do this, right-click anywhere in the window and click **Personalize**. The Quick View tab of the Collection Type Editor appears.

**Tip:** The Quick View window only displays categories that have information in them.

## Recording additional information about objects

Once you have added a new object to your database you will probably want to add to or edit the information you have entered about the object. Collectify's Objects windows give you a handy way to do this, since each window allows you to access a portion of the information.

For example, the Objects • Condition window enables you to view, add and edit information relating to the condition of the object, including any repairs or treatments the object has undergone. You can also note any future treatment plans and set Collectify to remind you about them at a future date.

Objects windows enable you to record four kinds of information about objects in your database.

- Descriptive information such as the type of object, artist and materials used. Some of this information may have been entered using the New Object Wizard or the Duplicate Object tool.
- Financial information about the purchase, sale or other expenses relevant to the object.
- Other information such as consignments, provenance and expertise, and condition.
- Information related to the object but located in other modules, such as related literature, insurance coverage and appraisals.

Whenever you are looking at an object record, the Record Explorer along the right-hand side contains a list of all Objects windows. The 🗐 icon indicates that the window has information and the ▢ icon indicates that all fields in that window are empty. Simply click on the name of a window to access it.

To get help about an Objects window, access the window and then click the **Help** button on the toolbar. Alternatively, you can click on the window name in the **Objects windows** book in the Table of Contents at left.

How do I access Objects windows?

## Objects windows

### The Objects • Description window

Use the Objects • Description window to view, record and update descriptive information about an object in your Collectify database.

How do I access Objects windows?

- To add new information, click the **Add Field** button at the bottom of the window to open the Add Field dialog. Next, choose a field from the list by clicking on it, then click **OK**. It is then added to the Objects • Description window. Finally, record information about the object in the new field.
- To change the order in which the fields are displayed, hold down the **ALT** key, then click and drag the field to a new location.
- To update information displayed in the window, simply enter the new information into the appropriate field (box). To delete the current contents of a field, select the text to be deleted and press the **Delete** key or begin typing the new information.

By default, the Objects • Description window displays a set of fields for that Collection Type. You can modify this default list using the Collection Type Editor - Description tab. To access this, right-click anywhere in the Objects • Description window and click **Personalize**.

> **Tip:** Fields that do not have any information in them are not displayed in this window.

How do I record information in fields (boxes)?

### The Objects • Accounting window

Use the **Objects • Accounting** window to add, view and edit financial information pertinent to the object. This helps you keep track of all income and expenses related to your database. Use the Accounting window when you buy an object, sell an object, or incur other expenses related to objects in your database.

How do I access Objects windows?

To view information about an existing Accounting entry, click on that entry in the list, and information about the entry is displayed in the lower portion of the window.

To add a new Accounting entry,

1. Click **New Accounting**.
2. Choose whether it is a cost transaction or a revenue transaction.
3. Next, record information about the transaction in the lower portion of the window. You can record information about who the vendor or buyer is, details of the financial transaction, and you can add related media.

For revenue transactions you will be asked to choose a Revenue Type. The Revenue Type sets the status of the object, and this determines where the object is to be found in the Objects module in the Collection Explorer (see About objects for more information). There are five available Revenue Types to choose from.

- Sale. The object is no longer part of your collection because you sold it. The object will have a Sold status.
- Gift/Donation. The object is no longer part of your collection because you gave it away it. The object will have a Gifted/Donated status.
- Barter Value. The object is no longer part of your collection because you bartered it. The object will have a Bartered status.
- Claim Payment. The object is no longer part of your collection because someone claimed payment for it. The object will have a Claimed status.
- Deaccession. The object is no longer part of your collection because you removed it from your collection in some other way. The object will have a Deaccessioned status.

## The Objects • Beneficiary window

Use the Objects • Beneficiary window to record information about your intentions to donate or bequeath the object. How do I access Objects windows?

- To add a donation or bequest, click **New Beneficiary**. In the lower portion of the window, record information about the intended beneficiary, the date or event upon which the object will be bequeathed or donated, and any additional notes pertaining to the bequest or donation.
- To view or edit information about a donation or bequest, click on that entry in the top portion of the window, then edit the information in the bottom portion.
- To delete a donation or bequest, click on that entry and click **Delete Beneficiary**.

How do I record information in fields (boxes)?

## The Objects • Comparison Objects window

Use the Objects • Comparison Objects window to record information about objects that are comparable to the object you are cataloging but that are *not* in your Collectify database. For example, these can be objects in other people's collections or in galleries.

How do I access Objects windows?

> **Tip:** To link the object to other objects that are comparable or otherwise relevant and that *are* in your catalog, use the Objects • Related Objects window.

- To add a new comparison object, click **New Comparison Object**. In the lower portion of the window, record information about the comparison object. You may import or scan an image of the object or another related image (see Importing and scanning media).
- To view or edit information about a comparison object, click on that object in the top portion of the window, then view or edit the information in the bottom portion.
- To delete a comparison object, click on that entry and click **Delete Comparison Object**.

How do I record information in fields (boxes)?

## The Objects • Condition window

Use the Objects • Condition window to record information about such things as:

- The condition of the object.

- The results of a condition assessment or report.
- Details about the deterioration of (or other natural changes in) the object.
- Conservation or restoration treatment carried out on the object.
- Plans or recommendations about future conservation, restoration or other treatment of the object. You can include automatic reminders related to these plans or recommendations.

How do I access Objects windows?

- To add a new entry about a condition, click **New Condition**. In the lower portion of the window, record information about the condition, assessment, treatment or plan, as appropriate.
- To view or edit information about the condition of an object, click on that condition entry in the top portion of the window, then view or edit the information in the bottom portion.
- To delete a condition entry, click on that entry and click **Delete Condition**.

How do I record information in fields (boxes)?

## The Objects • Consignment window

Use the Objects • Consignment window to record information about a consignment transaction involving the object, including start and end dates for the consignment, information about the consignee, and price information about the consignment.

How do I access Objects windows?

- To record information about a new consignment transaction, click **New Consignment**. In the lower portion of the window, record information about the consignment.

  If the consignment involves temporarily moving the object, you can record this move by clicking the **Create Temporary Move** button at the bottom of the window. The new temporary move automatically has the dates, reminder, location and reason for the move filled in, based on the consignment information you have recorded.

- To view or edit information about a consignment, click on that entry in the top portion of the window, then view or edit the information in the bottom portion.
- To delete a consignment, click on that entry and click **Delete Consignment**.

How do I record information in fields (boxes)?

## The Objects • Copyright window

Use the Objects • Copyright window to record copyright information about the object, including the name of the person or organization holding the copyright and any publication, reproduction or other relevant restrictions associated with the copyright.

How do I access Objects windows?

- To add a new copyright, click **New Copyright**. In the lower portion of the window, record information about the copyright.
- To view or edit information about a copyright, click on that entry in the top portion of the window, then view or edit the information in the bottom portion.

- To delete a copyright, click on that entry and click **Delete Copyright**.

How do I record information in fields (boxes)?

## The Objects • Journal window

The Objects • Journal window contains a large text field. Use this window as you would a notebook or journal. For example, you can use the Objects • Journal window to record personal notes about the object, information about how and why you came to own the object, and so on.

How do I access Objects windows?

How do I record information in fields (boxes)?

## The Objects • Loans window

Use the Objects • Loans window to record pertinent information when you lend an object for an exhibition or other purpose. This window enables you to record information about the borrower, loan dates, and so on. It also enables you to record that the object has been returned.

How do I access Objects windows?

- To add a new loan entry, click **New Loan**. In the lower portion of the window, record information about the loan.

  If the loan involves moving the object, click the **Create Temporary Move** button at the bottom of the window to create a new temporary move entry for the object. The new temporary move automatically has the dates, reminder, location and reason for the move filled in, based on the loan information you have recorded.

- To view or edit information about a loan entry, click on that entry in the top portion of the window, then view or edit the information in the bottom portion.
- To delete a loan, click on that entry and click **Delete Loan**.

How do I record information in fields (boxes)?

## The Objects • Measurements window

Use the Objects • Measurements window to record measurement information about the object. These measurements can be of the object as a whole or of one of its components such as its frame or base.

How do I access Objects windows?

Each individual measurement is recorded as a measurement entry in the list. For example, the width of the object is one measurement entry and its height is another.

- To add a new measurement, click **New Measurement**. In the lower portion of the window, record measurement information about one component or aspect of the object.

For the important measurements, such as the object's overall height or weight, check the **Show in Quick View** check box. These measurements will be displayed in the quick view window and printed in reports.

- To view or edit information about a measurement, click on that entry in the top portion of the window, then view or edit the information in the bottom portion.
- To delete a measurement, click **Delete Measurement**.

How do I record information in fields (boxes)?

## The Objects • Permanent Location window

Use the Objects • Permanent Location window to record information about the permanent location of the object.

How do I access Objects windows?

- To record information about a new permanent location, click **New Permanent Location**. In the lower portion of the window, record information about the location.
- To view or edit information a permanent location, click on that entry in the top portion of the window, then view or edit the information in the bottom portion.
- To delete a permanent location, click on that entry and click **Delete Permanent Location**.

**Tip:** Don't use the Objects • Permanent Location window to record information about temporary relocations of an object.

If you put an object on consignment, record information about the new location of the object using the Objects • Consignment window.

If you lend an object for exhibit (or other purpose), record information about the new location of the object using the Objects • Loans window.

For all other temporary relocations of the object, record information about the new location of the object using the Objects • Temporary Move window.

How do I record information in fields (boxes)?

## The Objects • Provenance & Expertise window

Use the Objects • Provenance & Expertise window to record information about the pedigree of the object such as ownership, auctions and exhibitions of the object before it came under your care.

How do I access Objects windows?

To add a new provenance or expertise entry,

1. Click **New Provenance/Expertise**. The **New Provenance & Expertise** dialog pops up.
2. Click on the type of provenance or expertise you would like to record, then click **OK**.

3. In the lower portion of the **Provenance & Expertise** window, record information about the provenance or expertise. You may import or scan certificates, photographs, drawings or other related images (see Importing and scanning media).

To view or edit information about a provenance or expertise entry, click on that entry in the top portion of the window, then view or edit the information in the bottom portion.

To delete a provenance or expertise entry, click on that entry and click **Delete Provenance/Expertise**.

How do I record information in fields (boxes)?

## The Objects • Related Objects window

Use the Objects • Related Objects window to link the object with related objects in your database. For example, you can use the Objects • Related Objects window to keep track of dishes that form a set. Click on a related object in the list to see information about that object in the lower portion of the window.

How do I access Objects windows?

To add a new related object,

1. Click **New Related Object**.
2. Use the Link to Object dialog to find the related object, click on it, then click **OK**.
3. If the object is not already cataloged in Collectify, click **New Object** to start the New Object Wizard and record information about it now.

To delete a related object, click on that entry and click **Delete Related object**.

How do I record information in fields (boxes)?

## The Objects • Signatures & Marks window

Use the Objects • Signatures & Marks window to record information about signatures, inscriptions, labels or other marks applied to the object.

How do I access Objects windows?

- To add a new mark, click **New Signature/Mark**. In the lower portion of the window, record measurement information about the type, content and location of the mark.

  You may import or scan certificates, photographs, drawings or other images related to the mark (see Importing and scanning media).

- To view or edit information about a mark, click on that entry in the top portion of the window, then view or edit the information in the bottom portion.
- To delete a mark entry, click **Delete Signature/Mark**.

How do I record information in fields (boxes)?

## The Objects • Temporary Move window

Use the Objects • Temporary Move window to record information about a temporary relocation of the object, including the reason for the move, the duration of the move, and the new location.

How do I access Objects windows?

> ℹ **Tip:** Don't use the Objects • Temporary Move window to record relocation information when:
>
> The relocation is because you put the object on consignment. In this case, use the Objects • Consignment window to record information about the temporary move.
>
> The relocation is because you lent the object. In this case, use the Objects • Loans window to record information about the temporary move.
>
> The relocation is permanent. In this case, use the Objects • Permanent Location window to record information about the new permanent location.

- To record information about a temporary move, click **New Temporary Move**. In the lower portion of the window, record information about the new location.
- To view or edit information about a temporary move, click on that entry in the top portion of the window, then view or edit the information in the bottom portion.
- To delete a temporary move, click on that entry and click **Delete Temporary Move**.

How do I record information in fields (boxes)?

## The Objects • Transaction window

The Objects • Transaction window shows on-line transactions involving the object, made via Collectify's online services. For example, if you consign an object to an on-line auction, Collectify automatically records the consignment information in the Objects • Consignment window and it also records details about the online transaction in the Transaction window. All types of on-line transactions are recorded here, including consignments, appraisals and sales.

Unlike most other Objects windows, the Transaction window cannot be used to record information.

How do I access Objects windows?

## The Objects • Media window

Use the Objects • Media window to import and save images, videos, and other media associated with the object.

How do I access Objects windows?

To add a new visual,

1. Click **New Visual**. In the lower portion of the window, record information about the type, source and copyright of the image.
2. Next, import or scan the image. For information about how to import or scan images, see Importing and scanning media.

3. If you want to display the current image as a thumbnail at the top of the Record Explorer for this object, check **Use as Thumbnail**.

To view or edit information about an image, click on that entry in the top portion of the window, then view or edit the information in the bottom portion.

To delete an image entry, click **Delete Visual**.

How do I record information in fields (boxes)?

## The Objects • Insurance Claims window

Use the Objects • Insurance Claims window to add, view and edit insurance claim information related to the object. This window enables you to access information in the Insurance Claims module.

How do I access Objects windows?

- To view information about an existing insurance claim, click on that entry in the list. Information about the claim is displayed in the lower portion of the window.
- To add a new insurance claim, click **New Insurance Claim**.
- To edit an existing insurance claim, click on that entry in the list and click **Edit Insurance Claim**. This opens the Insurance Claims • Details window for that entry.

How is insurance information recorded in Collectify?

## The Objects • Insurance Policies window

Use the Objects • Insurance Policies window to add, view and edit insurance policy information related to the object. This window enables you to access information in the Insurance Policies module.

How do I access Objects windows?

- To view information about an existing insurance policy, select the policy entry from the upper list and the policy information is displayed in the lower portion of the screen.
- To edit this policy, click **Edit Insurance Policy** and the Insurance Policies • Itemized Objects window for that entry will appear.
- To link an object to an existing insurance policy, click **New Insurance Policy**, and then in the floating box select the policy from the list of all your policies.  Click **OK**.

How is insurance information recorded in Collectify?

## The Objects • Literature window

Use the Objects • Literature window to add, view and edit literature entries related to the object. This window enables you to access information in the Literature module.

How do I access Objects windows?

- To view information about an existing document, click on that entry in the list, and information about the entry is displayed in the lower portion of the window.
- To add new literature, click **New Literature**. This opens the New Literature Wizard.

- To edit an existing literature entry, click on that entry in the list and click **Edit Literature**. This opens the Literature • Details window for that entry.

How is literature cataloged in Collectify?

## The Objects • Valuations window

Use the Objects • Valuations window to add, view and edit appraisal and other valuation information related to the object. This window enables you to access information in the Valuations module.

How do I access Objects windows?

- To view information about an existing valuation entry, click on that entry in the list, and information about the entry is displayed in the lower portion of the window.
- To assign an insurance value for the object, click **Insurance Value** and choose a value from the list of stored values for the object, then click **OK**.
- To add a new valuation, click **New Valuation**.
- To edit an existing valuation, click on that entry in the list and click **Edit Valuation**. This opens the Valuations • Details window for that entry.

How are valuations recorded in Collectify?

# Creators and Contacts

## About creators and contacts

The Creators & Contacts module is the place to store information about the many people and companies related to your collecting activities, from manufacturers and artists to couriers, framers and insurance adjustors.

Use the Creators & Contacts module to record contact information such as telephone numbers and email addresses. You can also use the Creators & Contacts module to record biographical information about artists and other historical figures related to your collection. Collectify's multimedia capabilities enable you to add pictures, audio files, and other digital media.

Use the New Creator/Contact Wizard to create a new contact, creator or manufacturer. Once you have added a new contact, creator or manufacturer to the Creators & Contacts module, you will probably want to add to or edit the new record. See Recording additional information about creators and contacts for more information.

> **Tip**: You can get a quick list of all creator and contact records by clicking the Creators & Contacts - Active module view in the Collection Explorer (see Viewing lists of items).

## Using the New Creator/Contact Wizard

Use the New Creator/Contact Wizard whenever you want to create a new contact, creator or manufacturer in the Creators & Contacts module. The New Creator/Contact Wizard guides you through the process of recording information about the new person or company.

How do I access the New Creator/Contact Wizard?

1. In the first step in the New Creator/Contact Wizard, click on the type of creator/contact record you wish to add.

   A **contact** is any person or company related to your collecting, for example an appraiser or a courier company. A **creator** is the artist, craftsperson or builder who creates or created objects you are interested in. A **manufacturer** is a company that produces objects you are interested in, for example a car manufacturer or company that makes musical instruments.

2. The remaining steps in the New Creator/Contact Wizard will vary, depending on the kind of creator/contact you chose to add in the first step.

   You can use the New Creator/Contact Wizard to record as little or as much information as you wish about a new contact, creator or manufacturer.

3. You can click the **Finish** button at any time. You will be able to update and add to this information later using Creators & Contacts windows.

## Recording additional information about creators and contacts

Once you have added a new contact, creator or manufacturer to the Creators & Contacts module, you will probably want to add to or edit the new record. Collectify's Creators & Contacts windows give you a handy way to do this, since each window allows you to access a portion of the information. Information is divided into six windows.

- The Details window let you add and update general information about the person or company.
- The Address and phone window is used to record address and telephone numbers for a contact, creator or manufacturer.
- The Digital & Wireless window is used to record mobile phone, email, and other digital and wireless contact information.
- The Assistants window is the place to keep track of the names and telephone numbers of the contact's assistants, if any.
- The Literature window enables you to add, view and edit literature entries related to the person or company.
- The Links window enables you to view and open items linked to the creator or contact such as objects, literature or valuations.
- The Media window is used to store images and other digital media related to the contact.

Whenever you are looking at an creator/contact record, the Record Explorer along the right-hand side contains a list of all creator/contact windows. The ▤ icon indicates that the window has information and the ▢ icon indicates that all fields in that window are empty. Simply click on the name of a window to access it.

How do I access Creators & Contacts windows?

## Creators and Contacts windows

### The Creators & Contacts • Details window

Use the Creators & Contacts • Details window to add and update general information about the person or company. For example, use this window to record biographical information about an artist or information about the kinds of products produced by a manufacturer.

How do I access Creators & Contacts windows?

Which fields are available in the Creators & Contacts • Details window depend on the type of person or company it is: contact, creator or manufacturer.

- To add new information, click the **Add Field** button at the bottom of the window to open the Add Field dialog. Next, choose a field from the list by clicking on it, then click **OK**. It is then added to the window. Finally, record the information in the new field.
- To update information displayed in the window, simply enter the new information into the appropriate field (box). To delete the current contents of a field, select the text to be deleted and press the **Delete** key or begin typing the new information.
- To change the order in which fields are displayed, right-click anywhere in the window and click **Personalize**. This brings up the Collection Type Editor - Description tab. The changes you make here apply to all items of the same type as the current item: creator, contact or manufacturer.

How do I record information in fields (boxes)?

**Tip:** Fields that do not have any information in them are not displayed in this window.

### The Creators & Contacts • Address & Phone window

Use the Creators & Contacts • Address & Phone window to record address and telephone numbers for a contact, creator or manufacturer. You may record as many locations (addresses and telephone numbers) as you wish for each contact.

How do I access Creators & Contacts windows?

The top half of the window displays a list of locations for the contact. When you highlight a location in the list by clicking on it, the bottom half of the window displays address and telephone information about that location.

To add a new location, click **New Address and Phone** and fill in the fields in the bottom half of the screen.

Be sure to set one of the locations in the list as the default mailing address. This is done by clicking the **Default Mailing Address** check box at the bottom of the Creators & Contacts • Address & Phone window for that location.

How do I record information in fields (boxes)?

## The Creators & Contacts • Digital & Wireless window

Use the Creators & Contacts • Digital & Wireless window to record mobile phone, email, and other digital and wireless contact information.

How do I access Creators & Contacts windows?

The top half of the window displays a list of digital and wireless numbers or addresses for the contact. To add a new number or address, click **New Digital and Wireless** and fill in the fields in the bottom half of the screen.

How do I record information in fields (boxes)?

## The Creators & Contacts • Assistants window

Use the Creators & Contacts • Assistants window to record information about the contact's assistants.

How do I access Creators & Contacts windows?

The top half of the window displays a list of names and telephone numbers of assistants for the contact. To add a new assistant, click **New Assistant** and fill in the name and telephone number in the bottom half of the screen.

How do I record information in fields (boxes)?

## The Creators & Contacts • Literature window

Use the Creators & Contacts • Literature window to add, view and edit literature entries related to the person or company.

How do I access Creators & Contacts windows?

- To view information about an existing document, click on that entry in the list, and information about the entry is displayed in the lower portion of the window.
- To add new literature, click **New Literature**. This opens the New Literature Wizard. When you are done adding the new document, click the **Back** button on the toolbar to return to the Creators & Contacts • Literature window

## The Creators & Contacts - Links window

One of Collectify's most powerful features is its ability to link information in helpful ways. When you catalog objects, record information about insurance policies or claims, catalog literature or record valuations, this information is linked to the creator or contact it is related to. Use the Creators & Contacts • Links window to access these links.

How do I access Creators & Contacts windows?

The Creators & Contacts • Links window displays a list of all items linked to a particular artist or contact. To jump to an item, click on that item to highlight it, then click **Go To Link**.

## The Creators & Contacts • Media window

Once you have recorded information about a contact or artist, you may want to add digital media related to him or her. For example, photographs and works of art or reproductions can be scanned and imported, and electronic documents such as email messages and word processing files can be imported directly.

How do I access Creators & Contacts windows?

For information about adding and organizing digital media using the **Import Media** and **Scan Media** buttons, see Importing and scanning media.

# Insurance Claims

## About insurance policies and claims

Collectify cannot prevent loss or damage to objects in your collection. However, it can make the process of insuring your valuables and submitting a claim a whole lot easier.

- Collectify keeps track of information about all your insurance policies, including deductibles, blanket coverage, itemized coverage and restrictions. Collectify can even tell you where the original copy of your insurance policy is kept.
- Collectify organizes information for your claim and helps track information about the claim as it proceeds.
- Collectify automatically checks whether your insurance policies adequately cover the value of the objects in your database. Collectify can also remind you to take action on an insurance policy or claim on a specific day.

To take advantage of these helpful features, you'll need to keep your insurance policy and claim information up to date. This is done using the Valuations, Insurance Policies and Insurance Claims modules (see Integrated Valuations and Insurance Features).

**Tip**: The recommended way to keep track of values for your objects is in the Valuations module. For example, you can enter a Replacement Value for an object in Valuations. When you choose to add that object to an insurance policy, Collectify will assume that this is your preferred insurance value and will enter it for you into the Insurance Value field (see About valuations).

Collectify makes it easy to record and update pertinent information about your insurance coverage.

**Tip**: You can get a quick list of all insurance policy or claim records by clicking on the Insurance Policies - Active module view or the Insurance Claims - Active module view in the Collection Explorer (see Viewing lists of items).

## Recording additional information about insurance claims

Once you have added information about an insurance claim, you may want to add to or edit information about it. Collectify's Insurance Claims windows enable you to do this. Information is divided into three windows.

- The Details window lets you add and update general information about the claim record.
- The Related Objects window is used to record information about objects involved in the claim.
- The Media window enables you to add images and other media related to the claim.

## Insurance Claims windows

### The Insurance Claims • Details Window

Use the Insurance Claims • Details window to edit or update information about an insurance claim.

How do I access Insurance Claims windows?

The Insurance Claims • Details window shows all the information recorded about the insurance policy, except for a list of the objects related to the claim (that list is in the Insurance Claims • Related Objects window).

- To update information displayed in the window, simply enter the new information into the appropriate field (box).
- To delete the current contents of a field, select the text to be deleted and press the **Delete** key or begin typing the new information.

How do I record information in fields (boxes)?

## The Insurance Claims • Related Objects window

Use the Insurance Claims • Related Objects window to record specific information about the objects involved in an insurance claim.

How do I access Insurance Claims windows?

1. Choose a new object by clicking **New Related Object**.
2. The lower part of the Insurance Claims • Related Objects window displays the Amount Claimed, Insurance value, Coverage Type and Max Coverage, if these values have been recorded already in Collectify.
3. To add or edit an Amount Claimed, click **Edit Amount Claimed,** and then in the pop-up window choose an existing value from the upper list or specify a new claim amount in the lower New Value section.

   4. If your insurance claim involves more than one object, choose other objects and record information about them as described above.

How do I record information in fields (boxes)?

## The Insurance Claims • Media window

Once you have recorded information about an insurance claim, you may want to add digital media related to it. For example, paper documents such as the incident report can be scanned and imported, and electronic documents such as email messages and word processing files can be imported directly. This is done using the **Insurance Claims ● Media** window.

How do I access Insurance Claims windows?

For information about adding and organizing digital media, see Importing and scanning images.

# Insurance Policies

## About insurance policies and claims

Collectify can't prevent loss or damage to objects in your collection. However, it can make the process of insuring your valuables and submitting a claim a whole lot easier.

- Collectify keeps track of information about all your insurance policies, including deductibles, blanket coverage, itemized coverage and restrictions. Collectify can even tell you where the original copy of your insurance policy is kept.
- Collectify organizes information for your claim and helps track information about the claim as it proceeds.
- Collectify automatically checks whether your insurance policies adequately cover the value of the objects in your database. Collectify can also remind you to take action on an insurance policy or claim on a specific day.

To take advantage of these helpful features, you'll need to keep your insurance policy and claim information up to date. This is done using the Valuations, Insurance Policies and Insurance Claims modules (see Integrated Valuations and Insurance Features).

**Tip**: The recommended way to keep track of values for your objects is in the Valuations module. For example, you can enter a Replacement Value for an object in Valuations. When you choose to add that object to an insurance policy, Collectify will assume that this is your preferred insurance value and will enter it for you into the Insurance Value field (see About valuations).

Collectify's New Insurance Policies Wizard makes it easy to record pertinent information about your insurance coverage. The New Insurance Claims Wizard makes it simple to enter and update information about an insurance claim.

**Tip**: You can get a quick list of all insurance policy or claim records by clicking on the Insurance Policies - Active module view or the Insurance Claims - Active module view in the Collection Explorer (see Viewing lists of items).

## Recording additional information about insurance policies

Once you have added a new insurance policy, you may want to add to or edit information about it. Collectify's Insurance Policies windows enable you to do this, since each window allows you to access a portion of the information. Information is divided into four windows.

- The Details window lets you add and update general information about the policy.
- The Blanket Objects window is used to record information about groups of objects covered under the policy.
- The Itemized Objects window is used to record information about individual objects covered by special riders.
- The Media window enables you to add images and other media related to the policy.

## Insurance Policies windows

### The Insurance Policies • Details window

Use the Insurance Policies • Details window to edit or update information about insurance policies you hold that cover objects in your database.

How do I access Insurance Policies windows?

The Insurance Policies • Details window shows all the information recorded about the insurance policy, except for the blanket or itemized objects it covers.

To update information displayed in the window, simply enter the new information into the appropriate field (box). To delete the current contents of a field, select the text to be deleted and press the **Delete** key or begin typing the new information.

How do I record information in fields (boxes)?

## The Insurance Policies • Blanket Objects window

Once you have entered a new policy using the New Insurance Policy Wizard, you can add and edit information about the blanket coverage the policy provides using the Insurance Policies • Blanket Objects window. Use this window to record information about groups of objects covered by the insurance policy, where all the objects have the same insurance coverage.

How do I access Insurance Policies windows?

Some objects in your database may be included in special riders that increase the maximum coverage for that object. Use the Insurance Policies • Itemized Objects window to record coverage information about these objects.

1. Choose a new group of objects by clicking **New Blanket Group**.
2. In the lower part of the window, click the appropriate Check Boxes to select specific groups of objects in your collection.  To include your entire collection in the blanket group, select "All objects in collection".  If you wish to include just certain objects in your blanket group, select "Only objects matching these criteria", then choose one, two or all of the 3 check boxes:  Collection Type (choose a collection type), Location (choose a location), Valued at or under (specify a value).
3. In the fields below, enter any additional information you might have that is pertinent to this blanket group.
4. If more than one group of objects is covered by the policy, choose another blanket group as described above.

How do I record information in fields (boxes)?

The fields below the Criteria selection area show all the information recorded about the blanket group. To update information displayed in the window, simply enter the new information into the appropriate field (box). To delete the current contents of a field, select the text to be deleted and press the **Delete** key or begin typing the new information.

## The Insurance Policies • Itemized Objects window

Some objects in your database may be included in special riders that increase the maximum coverage for that object. Use the Insurance Policies • Itemized Objects window to record coverage information about these objects.

How do I access Insurance Policies windows?

**Tip:** Use the Insurance Policies • Blanket Objects window to record information about groups of objects covered by the insurance policy, where all the objects in the group have the same insurance coverage.

1. Choose a new object by clicking **New Itemized Object**.
2. Use the Link to Object dialog to find the object, click on it, then click **OK**.
   The lower half of the Insurance Policies • Itemized Objects window shows the Insurance value, if any, that you have recorded for the object, as well as the type of valuation and the date of that valuation.
3. To assign a new Insurance Value, click **Edit Insurance Value** and choose a value from the list of values already recorded for the object, or create a new Insurance Value and Type.  Click **OK**.  The revised value will be displayed as the Insurance Value in the Itemized Objects window below.  For your convenience, new insurance values, the date and type will also be recorded in the Valuations module, with your name entered as the appraiser.
4. If more than one itemized object is covered by the policy, choose another object and record information about it as described above.

> **Tip:** All values recorded in Insurance Policies • Itemized Objects will also be stored in Valuations so you can keep track of all values assigned to your objects.

How do I record information in fields (boxes)?

## The Insurance Policies • Media window

Once you have recorded information about an insurance policy, you may want to add digital media related to it. For example, paper documents such as the policy itself can be scanned and imported, and electronic documents such as email messages and word processing files can be imported directly. This is done using the Insurance Policies • Media window.

How do I access Insurance Policies windows?

For information about adding and organizing digital media, see Importing and scanning media.

# Literature

## About literature

Collecting objects usually also means collecting information about those objects. You may keep biographies and newspaper clippings in a file drawer, store catalogs in boxes in the basement or devote a shelf or two to reference books. You may also have information in electronic form, for example from email correspondence or Web sites.

Collectify's Literature module enables you to save, organize and search these disparate documents. Electronic documents—such as word processing files, digital images, email messages and audio files—can be saved directly in the Literature module; paper-based documents can be scanned and saved, or simply cataloged. You can build as extensive a library as you choose, gaining instant access to all literature related to a specific object in your database or associated with an individual or company in your list of Creators and Contacts.

Use the New Literature Wizard to add a new document to your Collectify database. Then, link the document with related objects and related creators & contacts and add digital media about to the document.

> **Tip**: You can get a quick list of all Literature records by clicking on Literature - Active module view in the Collection Explorer (see Viewing lists of items).

## Using the New Literature Wizard

Use the New Literature Wizard whenever you want to record information about a new document relevant to your database.

How do I access the New Literature Wizard?

The New Literature Wizard guides you through the process of recording information about the document. You can use the wizard to record as little or as much information as you want– simply click the **Finish** button at any time. You will be able to update and add to this information later using the Literature • Details window.

Once you have recorded information about the document, you can link it to related objects or related creators & contacts, and add digital media related to the document.

## Literature windows

### The Literature • Details window

Use the Literature • Details window to edit and update information about a document you have entered.

How do I access Literature windows?

The Literature • Details window shows all the information recorded about the document, except for its links to related objects and related creators & contacts. To add new information,

1. Click the **Add Field** button at the bottom of the window to open the Add Field dialog.
2. Choose a field from the list by clicking on it, then click **OK**. It is then added to the window.

3. Finally, record the information in the new field.

To update information displayed in the window, simply enter the new information into the appropriate field (box).

To delete the current contents of a field, select the text to be deleted and press the **Delete** key or begin typing the new information.

To change the order in which fields are displayed, right-click anywhere in the window and click **Personalize**. This brings up the Collection Type Editor - Description tab. The changes you make here apply to all Literature items of the same type as the current item: Academic Journal, Email or Sales catalog, for instance.

How do I record information in fields (boxes)?

> **Tip:** Fields that do not have any information in them are not displayed in this window.

## The Literature • Related Objects window

Use the Literature • Related Objects window to link a document to the objects the document is about. How do I access Literature windows?

1. Choose a related object by clicking **New Related Object**.
2. Use the Link to Object dialog to find the related object, click on it, then click **OK**.
3. In the lower part of the Literature • Related Objects window enter a page number reference for the object, if applicable.
4. If the document is about more than one object in your database, link those other objects to it as described in the previous two steps.

Why link items with objects or contacts?

## The Literature • Related Creators & Contacts window

Use the Literature • Related Creators & Contacts window to link a document to creators, manufacturers and other contacts the document is about. How do I access Literature windows?

1. Choose a contact by clicking **New Related Contact**.
2. Use the Link to Creator/Contact dialog to find the contact, click on it, then click **OK**.
3. In the lower part of the Literature • Related Creators & Contacts window enter a page number reference for the object, if applicable.
4. If the document is about more than one contact, link those other contacts to it as described in the previous step.

Why link items with objects or contacts?

## The Literature • Media window

Once you have cataloged a document, you may want to add digital media related to it. For example, paper documents can be scanned and imported, and electronic documents such as email messages and word processing files can be imported directly. This is done using the Literature • Media window.

How do I access Literature windows?

For information about adding and organizing digital media, see Importing and scanning media.

# Valuations

## About valuations

Collectify helps you organize appraisal information about objects in your database using the Valuations module. Maintaining current valuations for your collectibles helps ensure they are properly insured, and keeping a history of values over time provides a useful overview of your personal assets for estate planning and so on.

There are other benefits to maintaining current valuations.  For example, if you enter a Replacement Value for an object in Valuations and then include that object in an insurance policy, Collectify will automatically insert the Replacement Value into the insurance policy for you (see Integrated Valuations and Insurance Features).

Use Collectify to record valuation information for several objects appraised at the same time, or to record multiple appraisals for a single object. Collectify's multimedia capabilities enable you to save and organize all your appraisal data, including reports, drawings, photos or correspondence, for future access.

For example, before having some of your coin collection appraised this year, you may choose to review and print previous valuations of these coins or related objects. If you have used a particular appraiser before, you can also display and print a list of all previous valuations that person has done for you.

Collectify makes it easy to record pertinent information about a valuation and link it to the objects that were appraised, and even add digital media. You can later view and update this information using the Valuations • Details window, the Valuations • Related Objects window and the  Valuations • Media window.

> **Tip**: You can get a quick list of all Valuation records by clicking on Valuations - Active module view in the Collection Explorer (see Viewing lists of items).

## Integrated Valuations and Insurance Features

The Valuations and Insurance modules in Collectify have been integrated to better track the value of your collection and to help you protect your investment.

Collectify helps you organize appraisal information about objects in your database using the Valuations module. Maintaining current valuations for your collectibles helps ensure they are properly insured, and keeping a history of values over time provides a useful overview of your personal assets for estate planning and so on.

The recommended place to record all values for your objects is in Valuations.  There are benefits to proceeding this way.

- All values are stored in one handy place for your review.  These values can be values from a professional appraiser or merely speculative values you have gleaned from catalogues or even television antique programs.
- You can choose your insurance value from within Valuations, so when you come to insure your objects, you will not have to search for their values.  The software will suggest Replacement Value as the default insurance value (this is the industry standard), but you can choose a different value such as Market Value, if you prefer.  If you choose to change an insurance value in Insurance Policies • Itemized Objects,

Collectify will display a list of your values from Valuations, as well as your purchase price, to help you to make an informed decision.

- Values you record in the Valuations module will be used by the software to determine if you are adequately insured.  For example, you might have your jewelry covered under a blanket attachment to your policy and that blanket coverage will have a maximum amount.  The software will monitor the insurance values you have recorded for all the jewelry that is covered by the blanket and alert you if their value exceeds the maximum coverage designated for that blanket.

> **Tip**: If you have not designated an insurance value for an object, but you have recorded a purchase price for the object in the Accounting module, Collectify will assume that this is the value for insurance.

## Valuations windows

### The Valuations • Details window

Use the Valuations • Details window to edit and update information about a valuation you have entered.

How do I access Valuations windows?

The Valuations • Details window shows all the information recorded about the valuation, except for the links to the objects that were appraised.

- To update information displayed in the window, simply enter the new information into the appropriate field (box).

To delete the current contents of a field, select the text to be deleted and press the **Delete** key or begin typing the new information.

How do I record information in fields (boxes)?

### The Valuations • Related Objects window

Use the Valuations • Related Objects window to record specific valuation information about each object appraised in the valuation. The "related objects" listed in this window are simply the objects that were appraised in the valuation.

How do I access Valuations windows?

1. Choose a related object by clicking **New Related Object**.
2. Use the Link to Object dialog to find the related object, click on it, then click **OK**.
3. Finally, enter valuation information about the object, including the valuation type, value, and any comments pertaining to this particular object within the valuation entry.
4. To assign an insurance value for the object, click **Insurance Value** and choose a value from the list of stored values for the object, then click **OK**.
5. If more than one object was appraised, choose another related object and add valuation information about it, as described in the previous step.

How do I record information in fields (boxes)?

## The Valuations • Media window

Use the Valuations • Media window to add digital media to the valuation entry, for example photos of the appraised objects, drawings by the appraiser, or even the complete appraisal report.

How do I access Valuations windows?

For information about adding and organizing digital media, see Importing and scanning media.

# Working with Collection Types

## About Collection Types

Perhaps Collectify's most powerful and revolutionary feature is its ability to group objects by Collection Type and to enable you to define your own Collection Types—thereby insuring that Collectify records and displays exactly the information you want, in exactly the way you want it.

The Collection Type you assign to an object determines so much about how you record and view information about the object. The Collection Type determines...

- ...what information the New Object Wizard asks for, and in what order.
- ...the information that is displayed in the Objects • Quick View and Objects • Description windows.
- ...what the icon for the object is and what the brief description that appears at the top of all Record and List View windows (and elsewhere) looks like .
- ...the windows that are available in the Record Explorer.
- ...and much more.

For this reason, it is important to spend some time thinking about which Collection Types you want to use in your database. To make best use of Collectify features and capabilities you will probably want to develop your own Collection Types that fit the objects in your database like a glove. It is easy to create a new Collection Type by copying and modifying one of the predefined ones that came with Collectify.

For example, your collection of folk art might include such disparate items as paintings, sculptures, furniture, clothing, and more. Creating a Collection Type "Folk Art" with appropriate fields would make it much easier to catalog and play with this information. Or you may have a Whisky collection—Collectify's "Fine Wines and Spirits" Collection Type can easily be copied and renamed "My Whiskies." You can remove unneeded fields related to grape, seepage, etc., and add custom fields specific to your database.

Use the Collection Type Manager to add your own Collection Types, and use the Collection Type Editor to edit them. Use the Custom Fields dialog to create custom fields to be included in a Collection Type.

## Using the Collection Type Manager

The Collection Type Manager enables you to add and edit your own Collection Types. The Collection Type Manager can be accessed from the menubar by clicking **Tools**, then **Collection Type Manager**.

The **My Collection Type** tab contains a list of Collection Types that have been created for the current database. You can copy, edit and delete these Collection Types.

The **Collectify Collection Type** tab lists the standard Collection Types for all Collectify databases. These Collection Types cannot be modified, but they can be copied to the My Collection Type tab for editing.

- To create a new Collection Type based on a Collectify Collection Type, click on the **Collectify Collection Type** tab, select the Collection Type you wish to copy, then click **Copy**. The Collection Type Editor - Name tab opens for the new Collection Type.

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- To create a new Collection Type from scratch, click on the **My Collection Type** tab, then click **New**. A completely empty Collection Type Editor - Name tab opens.
- To edit an existing Collection Type, click on the **My Collection Type** tab, select the Collection Type you wish to edit, then click **Edit.** The Collection Type Editor - Name tab opens for that Collection Type.
- To delete a Collection Type, click on the **My Collection Type** tab, select the Collection Type you wish to delete, then click **Delete.**

**Tip**: It is usually quicker and easier to modify an existing Collection Type rather than creating one from scratch. Peruse the Collectify Collection Type tab until you find the Collection Type closest to the one you want to create, then copy it as described above.

## The Custom Fields dialog

Collectify designers have tried to think of every kind of information anyone would want to record about their objects, from Alcohol Volume to Film Genre to Ruling Dignitary. There are hundreds, if not thousands, of predefined fields already in Collectify. However, your objects may be best described by a kind of information not already defined in Collectify. Collection Types you create or edit can make use of custom information fields you design.

The Custom Fields dialog enables you to add a new field to the list of fields you can incorporate into your Collection Types. The Custom Fields dialog can be accessed from the menubar by clicking **Tools**, then **Custom Fields**.

- To add a custom field, click **Add**, then choose the type of field it will be from the **Field Type** drop-down list. Finally, type in a label and brief description of the field (the description of the field will appear as a balloon tip whenever the mouse pointer rests on the field).
- To remove a custom field, select the field in the Custom Fields list, then click **Remove**. To edit a custom field, select the field in the Custom Fields list, then edit the Field Label, Field Type or Description boxes. When you are done, click **OK**.

## Using the Collection Type Editor

The Collection Type Editor is typically used to make changes to custom Collection Types that have been added to the database using the Collection Type Manager. The Collection Type Editor enables you to edit every aspect of the Collection Type, from which icon the Collection Type uses to how the New Object Wizard looks for that Collection Type.

Usually, the Collection Type Editor is accessed from the Collection Type Manager by clicking **Edit**. However, the Collection Type Editor is also used to personalize how objects and other items appear in Quick View, Description and Details windows.

**Tip**: The Description tab can be accessed from any Quick View, Description or Details window by right-clicking in the window, then clicking **Personalize**. For more information, see the Description tab.

- The Name tab enables you to change the name of the Collection Type and the icon that represents it in the record identifier, object lists and elsewhere.
- The New Object tab is used to change how the New Object Wizard behaves when you add a new object.
- Use the Quick View tab to modify how the Objects • Quick View window displays information for objects.

- The Description tab is used to change the order in which fields are displayed in the Objects • Description window and in Details windows in other modules.
- A brief description is the short description used, along with an icon, to identify the object, for example in the Record Identifier and elsewhere. Use the Brief Description tab to edit and format this description.
- The Record Explorer tab is used to edit which fields appear in the Record Explorer section of Objects windows.
- The Measurements tab lets you define the dimensions and default units for measurements that appear in the New Object Wizard and in the Objects • Measurements.
- Some drop-down lists are specific to a particular Collection Type. You can modify these drop-down lists using the Drop-Downs tab.

## The Collection Type Editor - Name tab

This tab displays basic information about Collection Type and the icon used to represent it in the record identifier, object lists and elsewhere.
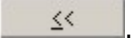
- To change the name of the Collection Type, enter a new name in the **Collection Type** field.
- To change the icon, click **Change Icon** and select one from the list or browse to another directory.

You can also add a brief description of the Collection Type in the **Description** field.

## The Collection Type Editor - New Object tab

Use this tab to change how the New Object Wizard behaves when you add a new object in this Collection Type. The Available Fields box contains a list of all the fields available to record information in Collectify, including custom fields, if any. The New Object Fields box contains a list of the fields contained in the New Object Wizards for this Collection Type.
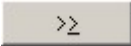
The fields are listed in the order they appear in the wizard, and the separators (lines) force a new step (or screen) to appear in the wizard.

- To add a field to the wizard, click on the field in the Available Fields list, then click [ >> ] .
- To add a separator, click the field in New Object Fields below which you want the separator to appear, then click **Separator**.
- To remove a field or separator from the wizard, click the field or separator in New Object Fields list to be removed, then click [ << ] .

## The Collection Type Editor - Quick View tab

Use this tab to modify how the Objects • Quick View window displays information for objects in the Collection Type.

The Available Fields box contains a list of all fields available to display, including custom fields, if any. The Quick View Fields box contains a list of the fields displayed in the Quick View window for this Collection Type, in the order they are displayed.

- To add a field to the Quick View window, click on the field in the Available Fields list, then click [ >≥ ].

- To remove a field from the Quick View window, click the field in the Quick View Fields list, then click [ ≤< ].

Only fields containing information about an object are actually displayed in the Objects • Quick View for that object. For this reason, it may be that for some objects not all fields listed in the Quick View Fields list actually appear in the window.

Fields that appear in the New Object Wizard are marked with an asterix (*).

## The Collection Type Editor - Description tab

The Collection Type Editor - Description tab has two uses.

- It is used to modify the order in which the Objects • Description window displays information about objects in the Collection Type.
- It is also used to modify the order in which Details windows in other modules display information about items.

The Description Fields box contains a list of all fields in the Description or Details window, including custom fields, if any.

To move a field up or down, click and drag the field within the box or click on the field and use the **Up** or **Down** buttons.

Only fields containing information about an item are actually displayed in the Description or Details windows for that item. For this reason, it may be that for some items not all fields listed in the Description Fields list actually appear in the window.

Fields that appear in the New Object Wizard are marked with an asterix (*).

## The Collection Type Editor - Brief Description tab

A brief description is the short description used, along with an icon, to identify the object, for example in the Record Identifier and elsewhere. Use the Collection Type Editor - Brief Description tab to edit and format this brief description.

The Preview area of the tab gives an example of the current brief description, and the Dividers and Fields boxes show how that brief description was constructed.

- You can play around with different divider characters, such as ˜, —, / or •.
- You can also change which fields are shown in the brief description and the length of each field.
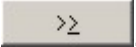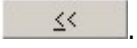
Changes you make in the Dividers and Fields boxes are instantly shown in the Preview area.

## The Collection Type Editor - Record Explorer tab

This tab is used to edit which fields appear in the Record Explorer section of Objects windows for the Collection Type, and the order in which they appear.

In the Record Explorer View box, choose whether you want to modify the fields that are displayed in **List View** (where Collectify displays a list of objects) or **Item View** (where Collectify displays information about a single object). Typically, in List View the Record Explorer displays a small amount of information, usually the reference number and Collection Type of the selected object. In Item View, on the other hand, the Record Explorer usually displays links to all information about the object.

The Available Fields box contains a list of all fields available to display, including custom fields, if any. The Record Explorer Fields box contains a list of the fields displayed in the Record Explorer window for this Collection Type and view, in the order they are displayed.

- To add an item to the Record Explorer, click on the field in the Available Items list, then click ⟩⟩ .
- To remove an item from the Record Explorer, click the field in the Record Explorer Items list, then click ⟨⟨ .
- To move a field up or down, click and drag the field within the box or click on the field and use the **Up** or **Down** buttons.

Fields that appear in the New Object Wizard are marked with an asterix (*).

## The Collection Type Editor - Measurements tab

This tab lets you define the dimensions and default units for measurements that appear in the New Object Wizard and in the Objects • Measurements window for the Collection Type.

Click on a Dimensions drop-down to change the dimension (such as height or width) or type of measurement (such as weight or volume), then click on the Default Units drop-down next to it to choose a default unit for that dimension.

## The Collection Type Editor - Drop-Downs tab

Some drop-down lists are specific to a particular Collection Type. For example, the "grape varieties" drop-down is used in the "Fine Wines and Spirits" Collection Type. You can modify these drop-down lists using the Collection Type Editor - Drop-Downs tab.

First, click on the drop-down list you would like to edit from the Drop-Downs box at the top of the tab. Fields that appear in the New Object Wizard are marked with an asterix (*). To add a new option to the drop-down, click **Add** and type in the new option. To remove an option, click on the option and click **Remove**. To move an option up or down, click the option and click **Up** or **Down**. To sort the options in alphabetical order, click **Sort**.

# Recording and linking information

## Overview of recording information in fields

Collectify includes many tips, tricks and aids to make the process of recording information quick, easy and accurate.

To record information in most fields, simply click anywhere in the field and type the text you want to record.

- Some fields contain drop-down lists, indicated with a ⏷ button. In these fields, you can type the text you want to record or click on the ⏷ button, then click on a choice from the list. The choices in the list can be customized (see Customizing drop-down lists).

- Some fields contain dates. You can type the date directly into the field, or click the ⏷ button and a calendar pops up.
     1. Choose the month using the scroll buttons, or click on the month currently displayed and choose another month from the list.
     2. Choose the day by clicking on it. To jump to today's date, click on today's date at the bottom of the calendar.

One of Collectify's most valuable features is its ability to link any item—literature, insurance information, and so on—with objects, contacts and insurance policies.

- Fields with a 🔲 button are used to link to objects in the database. Click the 🔲 button to link to an object (see Linking to objects). Click the ✖ button to delete a link in that field.
- Fields with a 🔲 button are used to link to creators and contacts. Click the 🔲 button to link to a creator, manufacturer or contact (see Linking to creators and contacts). Click the ✖ button to delete a link in that field.
- Fields with a 🏠 button are used to link to insurance policies. Click the 🏠 button to link to an insurance policy (see Linking to insurance policies). Click the ✖ button to delete a link in that field.

For more information, see Why link items with objects or contacts?

To get a brief description of the kind of information you should record in each field (box), let the mouse pointer rest anywhere inside the field for a few seconds and a balloon tip will pop up. These descriptions are also available in the Data Dictionary.

> **Tip:** You can access Data Dictionary definitions related to a help topic by clicking the **Related Data Dictionary definitions** button in that topic. You can also browse the Data Dictionary by clicking the **Data Dictionary** book in the Table of Contents.

## Why link items with objects or contacts?

One of Collectify's most valuable features is its ability to link any item—literature, insurance information, and so on—with objects or contacts. These links function as cross-references, enabling you to organize and find information quickly and easily.

It is important, when recording information about an item, to spend a moment thinking about which objects or contacts are related to that item. Use the **Related Objects** window, the

**Related Contacts** window, or the links buttons [image] and [image] to create the links.

For some items it is obvious which objects or contacts should be linked to them. Valuations and insurance claims, for example, should be linked to the objects they refer to, while a work of art should be linked to its creator, designer, manufacturer or seller.

Literature links may require additional consideration. A catalog or reference book, for example, may contain information about objects of a similar type and period as those in your database. You may want to link the reference work to your objects, even if it does not directly mention those objects.

## Customizing drop-down lists

Fields that have a [image] button contain drop-down lists. Most drop-down lists can be customized by scrolling to the end of the list and clicking **Edit Drop-Down**. This brings up the **Drop-Downs** dialog.

The main field in the dialog shows the current contents of the drop-down list in the order that they appear in the list.

- To add a new choice to the list, click **Add** and enter the new choice.
- To remove a choice from the list, click on that choice to highlight it, then click **Remove**.
- To sort the list in alphabetical order, click the **Sort** button. To sort the list manually, click on a choice and click **Up** or **Down**.

Some drop-down lists can also be edited using the Drop-Downs tab of the Collection Type Editor. Edit drop-downs this way when you want the changes to apply to the drop-downs for all objects in the Collection Type.

Four kinds of drop-down lists work in a different way: currencies, types of digital and wireless contact information, measurements and taxes.

- When you edit **currency** drop-downs, each item in the drop-down list has a check box to its left. A check in the box indicates that the currency is displayed in the drop-down list, while an unchecked box means that the currency is not displayed.
- When you edit **digital and wireless contact** drop-downs, you can select both a type of contact (email, Web page, mobile phone, etc.) and the Internet protocol associated with it.
- When you edit **measurements** drop-downs, each item in the drop-down list has a check box to its left. A check in the box indicates that the measurement is displayed in the drop-down list, while an unchecked box means that it is not displayed.
- When you edit **taxes** drop-downs, you can specify whether each tax piggybacks (that is, is compounded on top of) taxes already applied to an item.

## Linking to objects

The Link to Object dialog enables you to link an object to a contact, insurance policy, valuation or other item.

Why link items with objects or contacts?

The Link to Object dialog gives you a number of ways to find the object to which you want to link.

- The most direct way is simply to scroll down the list of objects, select the one to which you want to link, and click **OK**. The list is sorted alphabetically, and you can type a letter to jump to that letter in the list.
- You can limit the objects displayed in the list to a particular Collection Type by clicking on that Collection Type in the **Filter** drop-down list.
- Alternatively, you can type a word or phrase in the **Find** box and click **Go**. This brings up a list of objects matching that word or phrase.
- If the object is not yet in the database, you can add the object by clicking **New Object** to start the New Object Wizard.

You can customize how items are displayed in the list . Use the **list selector** button at the top right to choose which of the list views to display.

- The Large Icons view shows a large icon and brief caption for each item.
- The Small Icons view shows a small icon and brief caption for each item.
- The List view shows a small icon and brief caption for each item, arranged in a list with one item per row.
- The Details view shows a small icon and a summary of information about the item, arranged in a list with one item per row. You can customize this view to display the kind of information that is useful to you (see The Personalize List Headers dialog).

## Linking to creators & contacts

The Link to Creators & Contacts dialog enables you to link a person or company to an object, insurance policy, valuation or other item.

Why link items with objects or contacts?

The Link to Creators & Contacts dialog gives you a number of ways to find the contact to which you want to link.

- The most direct way is simply to scroll down the list, select the one to which you want to link, and click **OK**. The list is sorted alphabetically, and you can type a letter to jump to that letter in the list.
- You can limit the people or companies displayed in the list to a particular type (creator, contact or manufacturer) by clicking on that type in the **Filter** drop-down list.
- Alternatively, you can type a word or phrase in the **Find** box and click **Go**. This brings up a list of creators & contacts matching that word or phrase.
- If the creator or contact is not yet in the database, you can add the person or company by clicking **New Creators & Contacts** to start the New Creator/Contact Wizard.

You can customize how items are displayed in the list . Use the **list selector** button at the top right to choose which of the list views to display.

- The Large Icons view shows a large icon and brief caption for each item.
- The Small Icons view shows a small icon and brief caption for each item.
- The List view shows a small icon and brief caption for each item, arranged in a list with one item per row.
- The Details view shows a small icon and a summary of information about the item, arranged in a list with one item per row. You can customize this view to display the kind of information that is useful to you (see The Personalize List Headers dialog).

## Linking to insurance policies

The Link to Insurance Policy dialog allows you to link an insurance claim to the policy it falls under.

The Link to Insurance Policy dialog gives you a number of ways to find the insurance policy to which you want to link.

- The most direct way is simply to scroll down the list of policies, select the one to which you want to link, and click **OK**. The list is sorted alphabetically, and you can type a letter to jump to that letter in the list.
- Alternatively, you can type a word or phrase in the **Find** box and click **Go**. This brings up a list of policies matching that word or phrase.
- If the insurance policy is not yet recorded in Collectify, you can add it by clicking **New Insurance Policies** to start the New Insurance Policies Wizard.

You can customize how items are displayed in the list . Use the **list selector** button at the top right to choose which of the list views to display.

- The Large Icons view shows a large icon and brief caption for each item.
- The Small Icons view shows a small icon and brief caption for each item.
- The List view shows a small icon and brief caption for each item, arranged in a list with one item per row.
- The Details view shows a small icon and a summary of information about the item, arranged in a list with one item per row. You can customize this view to display the kind of information that is useful to you (see The Personalize List Headers dialog).

## Personalizing list headers

Use the Personalize List Headers dialog to customize which kinds of information are displayed and in what order in a list view.
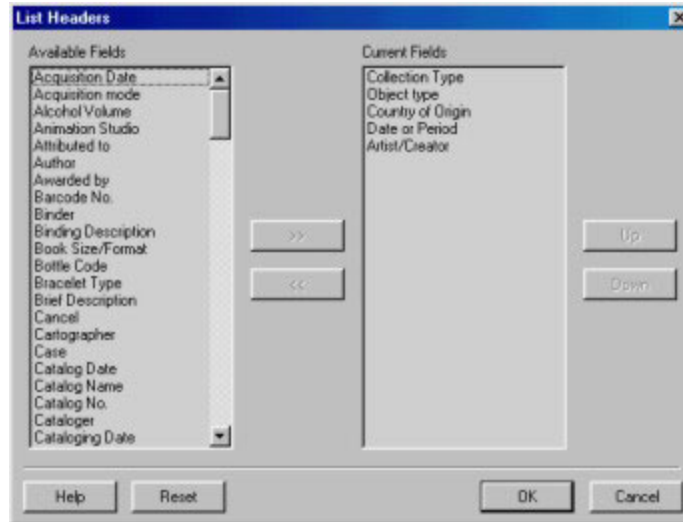
The **Current Fields** list (at right) shows the fields of information currently displayed in the Details view. The **Available Fields** list (at left) shows the fields that could be displayed.

- To add a category to the Details view, click on that category in the **Available Fields** list, then click the **>>** button. To remove a field from the Details view, click on that field in the **Current Fields** list, then click the **<<** button.
- To change the order that fields are displayed in the Details view, click on a field in the **Current Fields** list, then click **Up** or **Down** as appropriate.
- To reset the displayed fields to the default list, click **Reset**.

When you are done, click **OK** to return to the List Viewer window.

# Finding items

## About finding items

One of Collectify's most powerful features is its ability to find the information you need, quickly and accurately. You can search for any item in the database: object, contact, insurance claim, insurance policy, literature or valuation.

You can find items related to a particular object or contact, such as all the valuations of a particular work of art. You can also build customized searches to find items matching just about any combination of criteria. For example, you can find all your contacts who are appraisers located in a certain city. The possibilities are limitless.

The most convenient way to find information in Collectify is to use the Find boxes located on the homepage and in Collectify Explorer (at the bottom left side of all cataloging windows). Simply type the word or phrase you are looking for, then click **Go**. In Collectify Explorer, you can search the module you are currently in. On the homepage you can choose the module in which to search.

Collectify's Advanced Find tool enables you to build more complex and powerful searches.

> **Tip:** The results from your last search are saved. You can access them from Collectify Explorer by double-clicking on **Search Results**.

You can also search for items linked to a particular object or contact using Objects or Creators & Contacts windows. See Finding items related to an object or contact for more information.

## Finding items related to an object or contact

It is easy to find items related to a particular object or contact using Objects or Creators & Contacts windows. This topic covers Finding items related to an object and Finding items related to an creator or contact.

### Finding items related to an object

To find items related to an object, you first need to open the Objects • Description window (or any other Objects window) for that object. In the Record Explorer, click the name of the type of item you wish to find: ▤ **Comparison Objects**, ▤ **Related Objects,** ▤ **Insurance Claims**, ▤ **Insurance Policies**, ▤ **Literature** and ▤ **Valuations**.

In each case, the top half of the window will display a list of related items of that type. When you highlight an item in the list by clicking on it, the bottom half of the window will display information about that item.

### Finding items related to a creator or contact

To find items related to a person or company, you first need to open the Creators & Contacts • Links window for that person. You can access this window from any other Creators & Contacts window by clicking ▤ **Links** in the Record Explorer.

How do I access Creators & Contacts windows?

The Creators & Contacts • Links window displays a list of all items linked to the current artist or contact. To view an item, click on that item to highlight it, then click **Go To Link**.

## Using the Advanced Find tool

Collectify's Advanced Find tool enables you to build customized searches to find items matching just about any combination of criteria. For example, the figure below shows the Advanced Find tool set to perform a simple search in the Creators & Contacts module for a person with the last name Montague.

The Advanced Find tool is accessed by clicking **Find**  on the toolbar.

For information about what a button or field in the tool does, click on that area in the figure below.
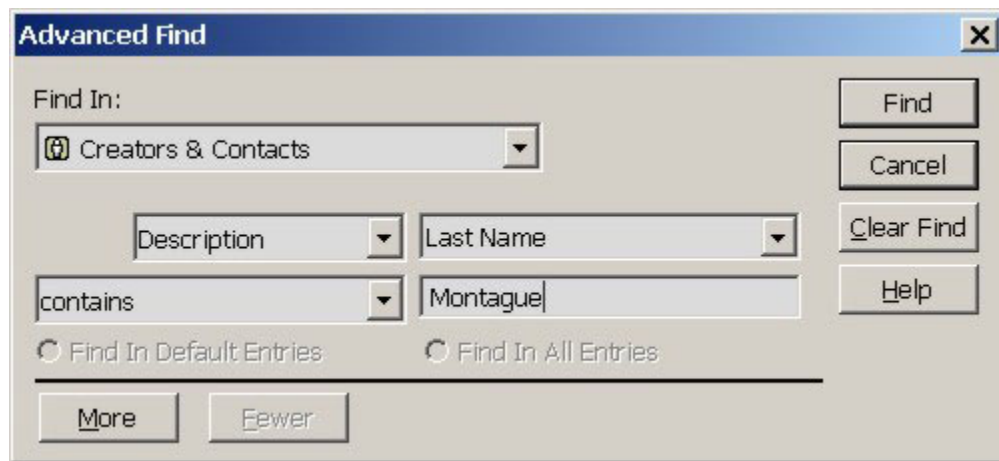


- Click **Find** when you have set the search criteria and are ready to perform the search.

The Advanced Find tool closes and Collectify displays the search results in the Search Results folder in Collectify Explorer.

> **Tip:** The results from your latest search are saved, and you can access them later from Collectify Explorer by double-clicking on **Search Results**.

# Virtual Catalogs

## About Virtual Catalogs

Collectify's Virtual Catalog feature enables you to create groups of objects that are unique and useful. A Virtual Catalog is a personalized list of objects you have created for a particular purpose–to update your insurance policy, itemize objects for a claim, consolidate objects for a loan or gift, or list objects for consignment.

You may choose to create a Virtual Catalog for your own enjoyment, to catalog your favorite items (call it "My Favorites") or objects you acquired on a particular trip (call it "Europe Winter 2002"). Virtual Catalogs are also used with Collectify's Screen Saver and Slideshow features.

To create a new Virtual Catalog, use the Virtual Catalog tool. You can then add objects to the Catalog, remove objects from it, and much more. See Working with Virtual Catalogs for more information.

## Working with Virtual Catalogs

Virtual Catalogs are flexible and easy to use. Once you have set one up, you can add objects to it or remove objects from it, make it the default Virtual Catalog, and edit other settings.

When you want to work with a Virtual Catalog, it is a good idea to make it the default. The default Virtual Catalog is the one to which objects are easily added and from which objects are easily removed. The name of the default Virtual Catalog is displayed in the Status bar at the bottom of all Collectify windows.

To make a Virtual Catalog the default one, open **Virtual Catalogs** in the Collection Explorer by double-clicking on it, then right-click on the Virtual Catalog you wish to make default, then click **Set as Default VC**. You can also make a Virtual Catalog the default (and edit other settings) using the Virtual Catalog tool.

### Adding and removing objects

There are several convenient ways to add objects to and remove objects from a Virtual Catalog.

- You can use the Objects tab on the Virtual Catalog tool to view a list of objects in the Virtual Catalog and to remove objects.
- You can add the object to a Virtual Catalog by selecting the object in a list or opening an Objects window for it. Next, click the **VC** button in the toolbar to add the object to the default Virtual Catalog, or, if you want to add the object to another Virtual Catalog, click the small arrow to the right of the button and choose it from the drop-down list.
- You can also add the object to the default Virtual Catalog or remove it by selecting the object in a list or opening an Objects window for it, then clicking **Virtual Catalog** on the menubar, then **Add to VC** or **Remove from VC**.

## Starting a new Virtual Catalog

To start a new Virtual Catalog, choose **Virtual Catalog** on the menubar, then **New...**. The **Virtual Catalog** dialog appears (see figure).
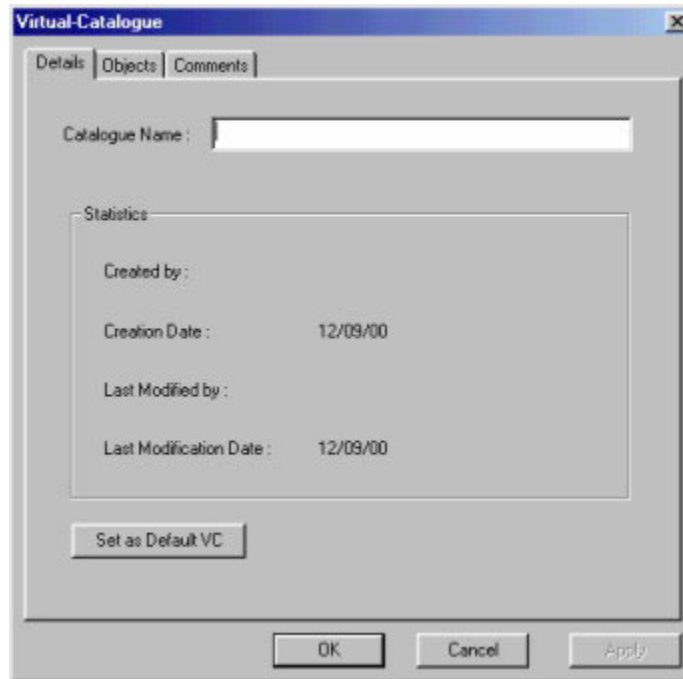
In the **Catalog Name** field, type a descriptive name for the Virtual Catalog.

If you wish to set this as the default Virtual Catalog, click the **Set as Default VC** button. The name of the default Virtual Catalog is displayed in the status bar at the bottom of the Collectify window.

> **Tip:** The default Virtual Catalog is the only Virtual Catalog to which you can add objects. Clicking the **Set as Default VC** button enables you to add objects to the Virtual Catalog you are currently setting up.

If you wish to add any descriptive comments about the Virtual Catalog, click the **Comments** tab at the top of the dialog and type your comments in the space provided.

Use the **Apply** button to save any changes you have made but keep the dialog open. When you are done, click **OK**.

## Using the Virtual Catalog tool

Use the Virtual Catalog tool to create and edit Virtual Catalogs.

To create a new Virtual Catalog, click **Virtual Catalog** on the menubar, then **New...**. You can also click the **New** button in the Virtual Catalogs section of the homepage.

To edit an existing VC, double-click on **Virtual Catalogs** in the Collection Explorer to open it and select the Catalog you want to edit from the list. Next, click **Virtual Catalog** on the menubar, then **Properties**.

- Use the Details tab to view and edit information about the Virtual Catalog.
- Use the Objects tab to view a list of objects in the Virtual Catalog and to remove them.
- Use the Comments tab to record general or background information about the Virtual Catalog.

> **Tip:** You can also add objects to a Virtual Catalog by selecting the object in a list (or viewing the object record) then clicking the **VC** button in the toolbar. The object will be added to the default Virtual Catalog, displayed in the Status bar at the bottom of all Collectify Windows.

## The Virtual Catalog - Details tab

The Virtual Catalogs - Details tab shows you information about the Virtual Catalog.

To change the name of the Virtual Catalog, simply type a new name in the **Catalog Name** field.

You can also use this tab to set the Virtual Catalog as the default, in order to add objects to it. To do this, check the **Default VC** box.

## The Virtual Catalog - Objects tab

Use the Virtual Catalog - Objects tab to view a list of objects in the Virtual Catalog. You can also remove an object from the Catalog by clicking on the object and clicking **Remove**.

## The Virtual Catalog - Comments tab

Use the Virtual Catalog - Comments tab to record general or background information about the Virtual Catalog, or any other information you wish.

The comments you enter here are displayed in the Slideshow.

# Collectify tools

## Working with data files

### About data files

Collectify stores all the information about each collection in various data files on your computer's hard disk. If these data files are lost, all the information about the collection will be lost as well. It is a very good idea to back up your collection data files on a regular basis. Use Collectify's Backup Wizard to do this.

Collectify's data files are organized in a proprietary way and can only be accessed using the Collectify program. However, it is possible to import data in other formats into Collectify and to export Collectify collection data to other formats. For example, you can import Microsoft Excel data files into Collectify. For more information, see Importing and exporting data.

### Importing and exporting data

Information in Collectify's data files is stored in a format that is specific to Collectify and can only be accessed using the Collectify program. To communicate information between Collectify and other programs, you can use Collectify's Import Wizard and Export Wizard.

**The Import Wizard**

Use the Import Wizard to bring data files from various sources into Collectify. To launch the wizard, choose **File** from the menubar, then **Import**.

**File formats**

The wizard will prompt you for the format of the file you wish to bring in to Collectify. You can import: a **dBase** file, a **Microsoft Access** file, a **Microsoft Excel** file or a **text file** (both regular .txt and comma separated variables .csv). You can also import data from another **Collectify database** file.

You will then be prompted for the location of the file to import and, depending on the type of file, for format-specific information about the data to import (for example, if you are importing a multiple-sheet Excel file, the wizard will prompt you to select the sheets to import).

**Import Templates**

The next phase will require you to select an Import Template: this is a way to tell Collectify how it should interpret the information in the file. Without an import template, the wizard would have no way of knowing how to treat the information in the file.

An Import Templates contain information about which Import Mode to use and what Module the new data should be put into. Depending on the Module selected, the template can also contain information about the Collection Type for the imported data. Finally, the template instructs the wizard on how to map your fields to ones that Collectify knows about.

You can create a new template and configure all its parameters or select a previously saved one from the list. You can also configure the parameters of an existing template before using by clicking the **Edit Import Template** checkbox. If you do not click the checkbox, the wizard will skip all configuration steps and proceed directly with the import.

**Advanced and Standard Import modes**

The first parameter you can configure in an Import Template is the Import Mode; it determines how very similar data rows are handled by the import process. If you select **Standard Mode**, each imported piece of information will be converted into a distinct entity in the database. For example, if you are importing Objects from an Excel file, each row will translate into a new Object in the Collectify database. This is the easiest way to import information and should cover most simple cases.

In more complex situations, the file to import may have many entries for the same data. For example, in an Excel file containing ten rows, you could have two rows describing the same object, with the corresponding fields in those two rows having the same value (name, description, etc) except for the cost: one row to show a purchase cost, and another a tax cost. You do not want these rows to be stored as separate objects, as they contain information about the same object.

This is when you would use the **Advanced Mode**: you can instruct Collectify to create a single entry in the database for multiple rows of your data file that describe the same entity. In our previous example, you would be able to have a single object created for the two rows, and the two costs for that object would be separate lines in the Accounting sub-module, giving you the purchase history of the object.

**Module and Collection Type**

The next step lets you instruct the wizard as to the type of data you are importing.

In the **Module Properties** step, you to select the **Module** where the data should be imported: **Objects**, **Creators & Contacts**, **Insurance Claims**, **Insurance Policies**, **Literature** or **Valuations**.

If you are importing **Objects**, **Creators & Contacts** or **Literature** data, you will also be prompted to further classify your data by selecting a **Collection Type** for it. You may select an existing one or Create a Custom Collection Type if none matches your specific data.

**Field mapping**

The final Import Template configuration step involves associating the fields in you file to ones that Collectify understands. Collectify can perform useful tasks data fields; for example, it can calculate a total cost based on an *Amount* and a *Discount*. For these features to work properly, you have to tell Collectify what each field in your data file represents. This is done by associating field names in your data file with field names that exist in Collectify. For example, your data file could have a column titled *Rebate* that you want treated as a Collectify *Discount* field. The Field Mapping step is where you tell Collectify treat is as such.

If you are using the Advanced Import Mode, you will first have a special mapping to perform for a single field called a **Key Field**: this is the field that the wizard will use to determine if rows refer to the same entity or to different ones. You can think of it as the *name* of the entity: if many rows have the same name, i.e. the same **Key Field**, they are considered to contain information about the same entity.

The **Source** pane shows the fields contained in your data file; the pane has three columns:

- **Field** shows the column headers in your file, which will be used as the field name (e.g. *Cost*)

- **Value** is an example of what Collectify perceives as raw data for each header in your file (e.g. 150$)
- **Destination** shows which of your fields are mapped to what Collectify field (e.g. *Amount*).

This last column is initially empty for a new Import Template: values will appear as you start mapping fields.

If you don't recognize the fields in your file, or if what you see in the Source pane in general does not seem to make sense, your data file may be corrupted, or more likely the format in which your data is stored in it may not be understood by Collectify. In this case, you will have to modify the file to change the layout of the data.

> **Tip**: Microsoft Excel files and text files are expected to contain one entity per row, with the first row containing the column headers. CSV files follow this same format, but have the data for each column separated by commas; two consecutive commas indicate an empty field.

> **Tip**: Collectify needs a name for each field: if the first row of your file has empty values (i.e. no name for a column), Collectify will assign an arbitrary name to the it, starting with *F1*, *F2*, etc.

The **Destination** pane shows a list of Collectify fields that you can choose from to associate to your data fields. The **Sub-Module** drop down list lets you filter the fields by category, so you don't have to scroll through all possible fields at once to perform the mapping.

To map fields, simply select one of your fields in the **Source** pane, and the Collectify field it should be associated with in the **Destination** field, and click on the **Map** button. The **Destination** column for your field should now show the Collectify field you just mapped to it. You can also change a mapping by selecting an already mapped **Source** field and clicking the **Unmap** button: this will remove the association, allowing you to map the field to a different Collectify field.

Collectify's list of fields is very extensive, but if your imported data has a characteristic that is not found in this list, you can click on the **Create a Custom Field** button to add a new field to match your specific characteristic.

### Saving the Import Template

The last step of the wizard will give you the option to save the template for future use; this is especially useful if you have many similar files to import and you do not want to repeat the template configuration process for each one. The next time you perform a file import, the saved template will be available in the list of existing templates to choose from.

### Performing the Import

At this point, the wizard starts reading data from your file and sorting it into its database. Depending on the amount of data you are importing, this can take anywhere from a few seconds to several minutes. A progress bar will give you feedback on the operation and you will be notified of completion with a final window stating that the import was successfully completed.

### The Export Wizard

For your convenience, you can use Collectify's Export Wizard to copy parts or all of your Collectify data into a file of a different format. To launch the wizard, choose **File** from the menubar, then **Export**

The Export Wizard will prompt you for a range of records to export: choose either **Selection**, or **All Records**. You will then select the output format for the export: a **dBase** file, a **Microsoft Access** file, a **Microsoft Excel** file or a **text file**; you can also elect to export to a **Collectify database** file. Finally, you will be asked to select the fields that you want to export.

The actual export process will then commence. Depending on the amount of data you are exporting, this can take anywhere from seconds to several minutes. A progress bar will give you feedback on the operation.

## Backing up and restoring your data

Collectify stores all the information about each collection in various data files on your computer's hard disk. The Options - File Locations tab shows the default folder in which these files are stored.

If these data files are lost, all the information about the collection will be lost as well. No computer is completely reliable, and there is always a small chance that your computer's hard disk may crash or some other mishap may occur. For this reason is it a very good idea to back up your collection data files on a regular basis. Use Collectify's Backup Wizard to do this.

Collectify can remind you to back up your data when you shut down the program. Use the Options - Backup tab to set these reminders.

The Backup Wizard makes it easy to back up your collection data files. To access the wizard, click **File** on the menubar, then **Backup**. The Backup Wizard compresses all the data files for your collection into a single Collectify backup file with a filename that ends with ".cbk".

> **Tip**: The Backup Wizard saves the backup file in a location you specify. If the backup file is on the same hard disk as your collection data files, and your hard disk or computer are lost, then you will lose both your collection data files and the backup file. **It is thus very important to regularly back up your Collectify backup files, along with all other important files on your hard disk, to another location such as a CD-ROM, Zip disk, or remote Internet location.**

Should your collection data files ever be lost, you can restore (replace) them from the Collectify backup (".cbk") file. This is done using the Restore tool. To access the Restore tool, click **File** on the menubar, then **Restore**. Of course, any changes you have made to the collection since the last time you backed up your files will be lost.

## Working with media and images

## About media and images

Collectify enables you to work with images and many other kinds of media files on your computer. This topic provides an overview of what these files are and how Collectify can help you work with them.

It is easy to import or scan images into Collectify. Collectify's Image Viewer tool is a handy way to view individual images in almost any format. If you want a quick overview of all the images of objects in a collection, use the All Visuals tool.

**Using images and other media files in Collectify**

With Collectify, you can use images and other media files in innumerable useful ways.

- Save email messages from a contact.
- Save the resume, web pages and portfolio of an artist or other creator.
- Save photographs of an object in your collection.
- Scan and save a copy of an insurance policy.
- Scan and save documents related to an appraisal.

Collectify enables you to organize media files and link them with objects, persons or any other item in any module. You can also categorize media files associated with a single object or other item.

**Types of files Collectify can work with**

Any file can be saved with Collectify. If the file you import is an image file supported by Collectify (see the Options - Image tab and see table below), then a thumbnail of the image is displayed. If the file is a web page, word processing document, or other kind of file, an icon representing the file is displayed.

Image files come in many types, or image formats. Examples of common image formats include Bitmap (.BMP file extension), Graphic Image File (.GIF) and JPEG (.JPG). Collectify can display image files in these and many other common image formats. Image files also come in many color modes (or bit depths). The color mode determines the number of colors or shades of gray used in the image.

The table below lists the image types supported by Collectify.

| Image Format | Filename Extensions |
|---|---|
| BMP Windows Bitmap | *.bmp, *.dib, *.rle |
| FPX FlashPix | *.fpx |
| JPEG Joint Photographic Experts Group | *.jpg, *.jpeg |
| PCD Kodak Photo CD | *.pcd |
| PCT Macintosh PICT | *.pct, *.pict |
| PCX PC Paintbrush | *.pcx |
| PNG Portable Network Graphics | *.png |
| PST Adobe Photoshop | *.psd |
| TGA Targa | *.tga |
| TIFF Tag Image File Format | *.tif, *.tiff |

## Importing and scanning media

You can add images to objects, literature and other items using Collectify's **Import media** and **Scan media** buttons. Some Collectify windows also allow you to display, categorize and organize multiple digital documents, including images, web pages and word processing files.

Collectify Help

**The Import Media and Scan Media buttons**

Any file can be imported to Collectify. If the file you import is an image file supported by Collectify (see the Options - Image tab), then a thumbnail of the image is displayed. If the file is a web page, word processing document, or other kind of file, an icon representing the file is displayed.

To import a file, click **Import media**, browse to the file you want to import and click **OK**. The **Add Description** dialog appears, asking you to add a short caption to describe the file you are importing. Type a caption or leave the default caption, which is the file name.

To import a media file directly from a scanner, digital camera, or other twain-compatible source, you must first set Collectify to recognize that source. To do this, click **File** on the menubar, then **Scan Source**. In the **Select Source** dialog, choose the image source from the list and click **OK**. Next, click **Scan media**. Choose the appropriate image from the **Scan** dialog, then click **OK**.

**Working with imported media**

The Object • Media window and Media windows in other modules allow you to import and scan files (as described above), and they also allow you to work with media files.

Double-click on an image or icon to open it. Images are opened with Collectify's built-in Image Viewer. Non-image files are opened with whatever program is usually used to open them on your computer.

Right-click on an image or icon to get a short menu of options.

- **Open** opens the image, as described in the previous point.
- **Open with...** opens the file with whatever program is usually used to open them on your computer or with the program you have associated with the image format using the Options - Image tab.
- **Save As...** opens the **Save As** dialog box so you can save (export) the file.
- **Remove** deletes the file.
- **Change Description** enables you to edit the caption that was assigned to the file when it was imported.
- **Set as Default** enables you to set the current image as the default image for that item. A thumbnail of the default image is displayed in the Record Explorer, and the image is used to represent the object in various other Collectify features.

You can also organize media files by category. The Categories field at the bottom of the window does two things. Click on a category from the list to display only media files from that category. Click **Edit Categories...** to add new categories to the list that are available when you right-click a file.

To assign a media file to a category, right-click on the image or icon. In addition to the options described above, the lower portion of the right-click menu displays a list of categories that have been defined for that module. A sample list of categories is shown in the figure below.
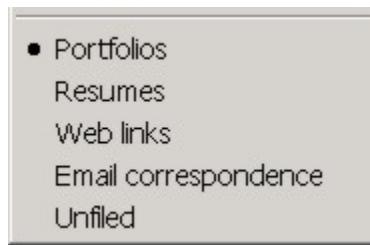


The bullet indicates the category that has been assigned to the file. Click on another category in the list to assign the file to that category.

## Using the Image Viewer

Collectify's built-in Image Viewer enables you to open and view images quickly and easily. Whenever you open an image from within Collectify, the image is automatically displayed in the Image Viewer.

The toolbar at the top of the Image Viewer provides some convenient tools for viewing and manipulating images.

- **Hand** moves the image around the window when the image size exceeds the window size.

- **Zoom** enables you to make the image larger or smaller. Click **Zoom**, then click anywhere in the image to zoom in from that spot. To zoom out, click **Zoom**, then hold down the **ALT** key and click anywhere in the image. Alternatively, you can zoom out by clicking **Zoom**, then right-clicking anywhere in the image.

- **Fit to window** resizes the image to fit in the window.

- **Actual Size** resizes the image to 100%.

- **Full Screen** uses the whole screen to show the image at the largest possible size. Tap the **ESC** key to return to the Image Viewer.

- **Rotate** rotates the image 90º counter-clockwise.

- **Marquee** is a selection tool for cropping the image.

- **Crop** crops the image where marked and re-displays the new image.

- **Undo** undoes (cancels) the last operation made on the image.

- **Save** saves all changes made to the image.

- **Print** prints the image.

The status bar at the bottom of the Image Viewer provides the following information about the image.

- The file name is shown in the first section.
- The size of the file (the amount of disk space it takes up) is shown in the second section.
- The resolution & color depth is displayed in the third section.
- The current zoom setting is displayed in the fourth section.

## Viewing all images

Collectify's All Visuals pop-up window shows thumbnails of all the images related to objects in the collection. Under each thumbnail is a brief description of the item.

To access the All Visuals window, click **Tools** on the menubar, then **All Visuals**.

The default image (the one used as a thumbnail in the Record Explorer) is indicated by a bold brief description caption. Double-clicking an image opens the Objects • Media window for that object.

## Reports

## About Reports

Collectify can generate a wide range of reports about your database. You can generate a report about a single object, contact, literature or other item, or you can generate a report about groups of items. You can use one of Collectify's many built-in report formats, or make your own customized report that includes exactly the information and images you want. Your reports can be printed, saved to disk in Adobe Acrobat (PDF) format, or sent by email as a PDF attachment.

**Collectify Report**

Clay, Porcelain and Glass

| | |
|---|---|
| Reference No.: | 2001.08.15.002 |
| Object type: | Vase |
| Material: | Glass |
| Technique: | Blown, carved, internally layere |
| Title: | Parqueterie-sur-verre glass vas |
| Date or Period: | c1904 |
| Artist/Creator: | Gilles Riche (French) |
| Country of Origin: | France |
| Description: | Shouldered body glass vase ar and cream leading to a base in crocuses mid-way up the body. |
| Distinguishing Features: | Slight scratching on underside |
| Cataloging Date: | 8/15/01 |
| Measurements: | The Object - Height 12 inches |
| Provenance & Expertise: | Previous Ownership - Novembe Colin Pembroke , Kingston-Upc Previous Ownership - April 16 1 Cawdrin-Ewen, Montpelier Auction - November 2 1925 - B Auction - April 16 1967  - Door Exhibition - June 1 2000-Augus Gallery, Silverfish County |

Creating a report is a two-step process.

1. Decide which items you want to include in the report (Choosing items for a report).
2. Use the Reports Wizard to create the report (Using the Reports Wizard).

## Choosing items for a report

Reports are created using the Reports Wizard. But before starting the Wizard, first decide which items you want to include in the report.

- To generate a report about a single item, view the item record, then start the Reports Wizard.
- To generate a report about a list of items, view the list of items, then start the Reports Wizard.
- To generate a report about only some items in a list, select the items in the list, then start the Reports Wizard. To select multiple items, hold down the **CTRL** key as you click on each item.
- To generate a report about *all* the active items in a module, e.g. about all your active objects, view any window in the module (item record or list), then start the Reports Wizard.

## Using the Reports Wizard

To start the Reports Wizard, click the Reports ![printer icon] button on the toolbar or select **Tools** from the menubar, then **Reports**. The main steps in the Report Wizard are explained below.

## Select Your Records

This step asks you to choose the records on which you would like to report.

- Click **All Records** if you would like to make a report on all the active records (e.g. your objects) in the module.
- Click **All Records in Current View** if you would like to make a report on the item record you are currently viewing *or* the whole list of items you are currently viewing (see Choosing items for a report).
- Click **Selected Records** if you would like to make a report on the item or items you selected before starting the Reports Wizard (see Choosing items for a report).

## Report Type

The next step displays a list of report templates. Click on a template to get a brief description of it.

- You can choose one of the report templates by clicking on it, then click **Next**. A different selection of report templates is displayed depending on the module the report is about. This takes you to the final step in wizard, Produce Your Report.
- You can choose one of the report templates by clicking on it, then check the **Customize Report** box, then click **Next**. This takes you to the report customization steps in the wizard.
- You can create a new report template from scratch by clicking **New Report...**, then **Next**. This also takes you to the report customization steps in the wizard.

## Report customization steps

These steps in the wizard enable you to customize the report in many ways. Several of these steps help you choose how your report is formatted, including its title, headers and footers, layout, paper size and whether to display only one object per page. This section describes two of the steps in detail, Select Your Report Fields and Filter Your Records.

## Select Your Report Fields

The Select Your Report Fields step enables you to choose which fields of information about the items will be included in the report. The **Modules** list displays a list of modules, and it also displays the module views within the module the report is about (e.g. if the report is on objects, it displays Accounting, Beneficiary, etc.).

Click on an entry in the Modules list to display all the fields within that module (or module view) in the **Available Fields** list. To include one of these fields in your report, click on it and click the right arrow to move it to the **Selected Fields** list. To can move multiple fields by selecting them (hold down the **CTRL** key as you click on them) and clicking the right arrow.

Some module views can contain multiple records. For example, the Objects · Condition module view typically contains a number of condition reports for the object, recorded at different times. In the **Filter** drop-down, choose whether the report should contain **All Records** from the module view or, where appropriate, only the **Latest Record**.

If the module or module view contains an image, check the **Display Thumbnail** box to have the report include a thumbnail of that image. You can also choose how the thumbnail image will be rendered in the report. If you leave the **Keep Current Image Resolution** checkbox **unchecked**, the image will be compressed, taking up less disk space. On the other, this process can take a long time. If you **check** the **Keep Current Image Resolution** box, images will be left in their original format, and the report generation time may be significantly reduced.

> **Tip**: If you are generating a report on a large number of items containing images, the report can take a very long time to generate: in this case, consider using the **Keep Current Image Resolution** option.

### Filter Your Records

The Filter Your Records step enables you to select only some records to be included in the report. If the **Use a Filter on the Report** box is checked, the report will contain only records that match the criteria chosen in this step. Record selection works in exactly the same way as the Advanced Find tool. For more information, see Using the Advanced Find tool.

### Produce Your Report

When you are done you can preview the report, print it, save it to disk in Adobe Acrobat PDF format, or send the report by email as an attachment.

# Screen saver

## Using the Screen Saver

Collectify's Screen Saver feature makes it easy to create a beautiful screen saver from one or more images in your database.

Collectify's screen saver is a moving collage of all the images in one of the Virtual Catalogs in your database. So before making your screen saver, create a Virtual Catalog containing the images you want included in the screen saver. The screen saver will contain the image used as a thumbnail in the Record Explorer for each object (see the Objects - Media window).

To create a screen saver, start the Screen Saver Wizard by clicking **Tools** on the menubar, then **Screen Saver**. The Wizard asks you which Virtual Catalog you want to create your screen saver from. The Wizard also gives you the option of installing your screen saver (so it works on your monitor), saving it to disk or emailing it out.

You can customize how the screen saver looks in several ways. See the Screen Saver - Settings dialog for more information.

## The Screen Saver - Settings dialog

Use the Screen Saver - Settings dialog to change how the screen saver looks and behaves.

How do I access the Screen Saver - Settings dialog?

- The **Transitions** drop-down lets you choose what the screen saver looks like as it changes from one image to the next.

- The **Time Between Images** slider enables you to set the amount of time each image is on screen.
- Click the **Preview** button to see what the screen saver looks like.

## Slideshow

### Using the Slideshow

Collectify's Slideshow feature enables you to make slideshows out of objects in your database. You can view these slideshows on any Windows computer, save them to disk or CD, put them on the Web, or email them to a friend. Collectify's slideshows are self-contained, so you don't need to install Collectify to view a slideshow.

A slideshow is made up of all the objects in one of the Virtual Catalogs in your database. So before making your slideshow, create a Virtual Catalog containing the objects you want included in the show. The slideshow can show text and images about each object in a variety of formats, as described below.

To create a slideshow, start the Slideshow Wizard by clicking **Tools** on the menubar, then **Slideshow**. The Wizard asks you which Virtual Catalog you want to create your slideshow from. When you are done, you can save your slideshow to disk or email it out.

**Tip:** Use the **Previous** and **Next** buttons to browse through the slideshow, or use the drop-down box (next to the buttons) to jump to a specific window.

Collectify slideshows display four types of windows.

- The Comments window displays any comments you have entered about the slideshow.
- The Thumbnails window displays thumbnails of all the images in the slideshow.
- An Image window shows a large image of one object. You can browse through image windows for each object in the slideshow.
- A Details window shows a thumbnail image and information about one object. You can browse through details windows for each object in the slideshow.

### The Slideshow - Comments window

The Comments window displays any comments you have entered about the slideshow. This window is the place to give any information about the slideshow you would like your viewers to see.

Text in the Comments window is the text that was entered in the Virtual Catalogs - Comments tab. The Slideshow Wizard gives you an opportunity to edit or delete this text.

**Tip:** Use the **Previous** and **Next** buttons to browse through the slideshow, or use the drop-down box (next to the buttons) to jump to a specific window.

### The Slideshow - Thumbnails window

The Thumbnails window displays thumbnails of all the images in the slideshow. The thumbnail displayed for each object is the thumbnail displayed in the Record Explorer for each object (see the Objects - Media window). If the slideshow contains too many images to fit in a single

Thumbnails window, you can browse through the Thumbnails by clicking **<< Previous Thumbnails** and **Next Thumbnails >>**.

> ℹ️ **Tip:** Use the **Previous** and **Next** buttons to browse through the slideshow, or use the drop-down box (next to the buttons) to jump to a specific window.

## The Slideshow - Image window

An Image window shows a large image of one object in the slideshow. The image displayed for each object is the image used as a thumbnail in the Record Explorer for each object (see the Objects - Media window).

> ℹ️ **Tip:** Use the **Previous** and **Next** buttons to browse through the slideshow, or use the drop-down box (next to the buttons) to jump to a specific window.

## The Slideshow - Details window

A Details window shows a thumbnail image and information about an object in the slideshow. The image displayed for each object is the image used as a thumbnail in the Record Explorer for each object (see the Objects - Media window). The text displayed for each object is the information shown in the Quick View window (see the Objects • Quick View window).

> ℹ️ **Tip:** Use the **Previous** and **Next** buttons to browse through the slideshow, or use the drop-down box (next to the buttons) to jump to a specific window.

## Update Database Wizard

When you upgrade your Collectify software to a more recent version, your database also needs to be upgraded. The Update Database Wizard does this automatically. Simply follow the steps in the Wizard and click **Finish** when it is done.

The Update Database Wizard does not change any of the information you have entered in your database, but it enables you to take advantage of any new features in the Collectify upgrade.

## Using the Scratch Pad

The Scratch Pad is a place to make quick notes about your database or paste in text you want to save.

To use the Scratch Pad,

1. Click the Pad button in the toolbar. Use the **Users** tab for notes that can be accessed only when you, the current user, are logged in to the database. Use the **Global** pad for notes that can be accessed by anyone logged in to the database.
2. You can resize the Scratch Pad by clicking and dragging any side or corner (the same way you resize most Windows windows). You can also cut and paste text into the Scratch Pad by using **CTRL+C** (to copy text), **CTRL+X** (to cut text) and **CTRL+V** (to paste it).
3. When you are done, click **OK** to save your changes and close the Scratch Pad, or **Cancel** to discard your changes and close the Scratch Pad.

> ℹ **Tip:** Only the database owner and users with full access can use the global scratch pad. See the Options - Users tab for more information.

## Using the Replace tool

Use the Replace tool to quickly find and replace text anywhere in your collection. To start the Replace tool, click **Edit** on the menubar, then **Replace**.

> ℹ **Tip:** We recommend backing up your database before using the Replace tool.

1. You can set where the Replace tool searches using the two **Look In:** fields. The upper field sets which module to look in, and the lower field sets which field within the module to search.

   When you open the replace tool, the default setting is to look in all modules and in all fields.

2. In the **Find What:** box, type the text you would like to find (the original text), and in the **Replace With:** field, type the text you would like to replace it with (the new text).
3. Finally, you can set the following options.
   - Check the **Find Whole Words Only** box if you want to find the text exactly as it is appears. If this box is not checked, the **Replace** tool will find the text within other words; for example, if you are looking for "consign" then the tool will find and replace "consigns," "consignment" and so on.
   - Check the **Replace Whole Field** box if you want the **Replace** tool to delete all the text in all fields matching the **Find What:** text and replace it with the **Replace With:** text.
   - Check the **Match Case** box if you want the **Replace** tool to find only text that exactly matches the case (upper and lower) of the **Find What:** text.

When you are done, click **Replace All** to make the replacements and close the tool or **Close** to close the tool without making any replacements.

# Setting options

## About options

The Options dialog lets you set various Collectify options.

- The General tab enables you to view and set options related to the current database.
- Use the Backup tab to set whether Collectify should remind you to back up your data, and if so, how often.
- The Collection Owner tab is the place to review and edit information about the owner of the current database.
- Use the Themes tab to change the color theme used in Collectify windows.
- The File Locations tab enables you to view and modify where Collectify saves the files it uses on your hard disk.
- Use the Images tab to see a list of image formats supported by Collectify and to customize the image editing programs you use.
- You can use the Registration tab to register your software over the Internet.
- The Users tab is where you can add or update security information about users for the current database.

## The Options - General tab

The Options - General tab enables you to view and set options related to the current database.

How do I access the Options dialog?

- When you set up the database, you gave the database a name and specified a currency for it to use by default. The **Database Name** and **Base Currency** fields let you change these settings for the database.
- Balloon tips are the yellow pop-up balloons that appear when you leave the mouse pointer over a field for a few seconds. Balloon tips contain a brief description of the field and other helpful information. You can hide balloon tips by unchecking the **Display Balloon Tips throughout the software** check box.
- Click the **Reset Welcome in Wizards** button if you have hidden the welcome screens of one or more wizards and want to see them again.

## The Options - Backup tab

Collectify can automatically back up your data files when you shut down the program (see Backing up and restoring your data). Use the Options - Backup tab to set whether Collectify should remind you to back up your data, and if so, how often.

How do I access the Options dialog?

Click the **Yes** radio button to have Collectify remind you to back up your data, then type how often (in days) you want to be reminded.

## The Options - Database Owner tab

When a new database is set up, the person creating the database is asked to enter information such as their full name and a username and password for access to the database. This person becomes the database owner.

The Options - Database Owner tab is the place to review and edit information about the owner of the current database. This tab is only available when the database owner is logged in to the database.

How do I access the Options dialog?

## The Options - Themes tab

Use the Options - Themes tab to change the color theme used in Collectify windows. Each color theme contains a coordinated set of colors for the display of all the modules, the Collectify Explorer and the Record Explorer.

How do I access the Options dialog?

> **Tip:** You can browse the color themes by choosing a color theme from the list and clicking **Apply**. You will see the results instantly in the main Collectify window (located behind the Options dialog). When you find a theme you like, click **OK**.

## The Options - File Locations tab

Use the Options - File Locations to tab view and modify where Collectify saves files on your hard disk.

How do I access the Options dialog?

The list shows each type of file Collectify uses and in which Windows folder the file is stored on your hard disk. To change where a type of file is stored:

1. Click on that file type in the list and click **Modify**.
2. In the Browse for Folder dialog, browse to the new folder in which you want to store that type of file.
3. Select the new folder by clicking on it and click **OK**.

## The Options - Images tab

Use the Options - Images tab to see a list of image formats supported by Collectify and to customize the image editing programs you use.

How do I access the Options dialog?

The Images tab displays a list of image formats supported by Collectify, the filename extensions associated with each of the formats, and the image editing application (program) associated with the image format. Collectify uses the Collectify Image Viewer to view images, but if you want to edit (modify) an image you must run an external image editing application. The image editing applications listed are the default ones defined for your computer.

- To remove an association between an image format and an image editing program, click on that image format in the list, then click **Clear**.
- To associate an image format with a new editing program, click on that image format and click **Associate**. This opens an **Open With** dialog displaying a list of all programs installed on your computer. Choose the appropriate image editing program from the list, then click **OK**.

> **Tip:** To associate multiple image formats with the same editing program, hold down the CTRL key while clicking on the formats in the list, then click **Associate**.

## The Options - Registration tab

You can use the Options - Registration tab to register your software over the Internet. Enter your name, your company name (optional) and serial number, then click **OK**.

How do I access the Options dialog?

## The Options - Users tab

When you create a new database, you are asked to enter information such as your full name and a username and password for access to the database. You become the database owner.

As the database owner, you can set up other users with varying levels of access to the database. This is useful if you would like someone else to catalog your objects but not be able to access financial information, or if you would like someone to be able simply to view images and a short description of objects in the database but not be able to make any changes. The Options - Users tab is where you set up and manage these users.

How do I access the Options dialog?

> **Tip:** Only the database owner has access to the Options - Users tab.

To add a new user, click **Add** and in the **User** fields type the full name of the user, along with a username and password. Next, choose an **access level** for the user from the drop-down list (see below). To remove a user, click the username to be removed in the **Users** list and click **Remove**.

There are four access levels for Collectify users.

- **Database Owner** means that the user has full access to all Collectify features for that database.
- **Full Access** means that the user has access to all Collectify features for that database except the Options - Users tab.
- **No Financials** means that the user cannot view or edit financial information in the database, but has access to the rest of the database and Collectify features. More specifically, the user cannot access Accounting, Beneficiary, Consignment, Insurance Claims, Insurance Policies, and Valuations windows.

  The user also cannot access the New Insurance Claim, New Insurance Policy, or New Valuation Wizards, the global scratch pad, or the General, Registration and Users tabs of the Options dialog.

- **Guest** means that the user can only view Objects • Quick View windows. The user is not able to open, add to or modify any other modules. The user can view Virtual catalogs within the Objects module, but not create or edit them. As well, the user does not have access to the Global Scratch Pad, the Options dialog, Reports and the Replace tool.

# Data Dictionary

## About the Data Dictionary

Collectify's catalog windows contain many fields (boxes) in which you record information, for example the telephone number of a contact or the provenance of an object.

You can get a brief description of the kind of information you should record in each field by letting the mouse pointer rest anywhere inside the field for a second. These definitions are also available in the Data Dictionary book in Collectify Online Help.

You can browse the Data Dictionary by clicking on the Data Dictionary book in the Table of Contents (at left). You can also go directly to Data Dictionary definitions related to a specific window or dialog by clicking the **Related Data Dictionary definitions** button in the help topic for that window or dialog.

# Glossary

## B

**Balloon tip:** A yellow pop-up balloon that appears when you leave the mouse pointer over a field for a few seconds. Balloon tips contain a brief description of the field and other helpful information.

## C

**Catalog window:** A catalog window displays the Collection Explorer along the left side and the Record and List Viewer in the middle. Catalog windows are used for recording and viewing information about a collection.

**Collection Explorer:** The Collection Explorer enables you to navigate throughout your Collectify collection using an intuitive tree of modules, just like Windows Explorer. The Collection Explorer is located along the left side of all catalog windows.

**Collection Type:** A descriptive way of grouping objects in your collection. Each object is assigned a Collection Type (e.g., "furniture and decorations," "memorabilia" and "prints and photographs"). You can use Collectify's predefined Collection Types, or create your own.

## D

**Data Dictionary:** A book (folder) in the help system that describes the kind of information you should record in each field in all Collectify windows.

**Database:** Database refers to all the information related to the physical objects you own and use Collectify to store and organize. A database is stored on your hard disk in a database file.

**Dialog:** A small window that pops up in front of the main Collectify window. A dialog helps you complete a specific task, such as choosing a file to open or changing Collectify's options.

**Double-click:** Press and release a mouse button twice very quickly.

## F

**Field:** A rectangular box in a Collectify window, usually white, in which you can record information, either by typing it in or by making a choice from a drop-down list.

## H

**Homepage:** Collectify's homepage gives you a snapshot of your collection along with quick access to many of Collectify's windows and features. The Homepage is usually the first page you see after you start up Collectify and log in to a collection. You can get back to the Homepage at any time by clicking the Home button on the toolbar.

## I

**Icon:** A small graphic that represents an object, contact, item or other element of Collectify. Icons help you identify the item or other element at a glance.

**Item:** An item (or record) is an assortment of information about a specific thing, for example, an object, creator or contact, insurance policy or claim, literature or valuation.

# L

**List view:** The List view portion of catalog windows displays information about lists of objects, contacts or other items.

# M

**MB:** A quantity of information (1,024 bytes) stored on a hard disk or in a computer's memory.

**Menubar:** An area near the top of the window with pull-down menus containing many Collectify tools and commands.

**Module:** Module refers to an assortment of information within a collection that is similar in nature. For example, all the information related to appraisals and other valuations is contained in the Valuations module. Collectify organizes information into six modules: Objects, Creators & Contacts, Insurance Policies, Insurance Claims, Literature, and Valuations.

**Module view:** Module views show only some of the items in a module. Typically, module views show all items with a certain status. For example, the Active Literature module view shows a list of all Literature records that are active (not deleted).

**Collectify Explorer:** Located along the left side of all catalog windows, it enables you to navigate throughout your Collectify collection in a variety of ways.

# O

**Object:** An object (or object record) is an assortment of information related to a specific physical article that you own.

**Object type:** A single term or short descriptive phrase that describes what an object is, such as "armoire," "bed" and "bookcase." Object types are grouped under more general Collection Types.

# R

**Radio button:** A small circular button that enables you to choose one option from a list.

**Record Explorer:** Located at the right side of all catalog windows, the Record Explorer displays a summary of information about the item highlighted in the viewer window.

**Record view:** The Record view portion of catalog windows shows detailed information about one object, contact or other item in your collection.

**Reference number:** A unique number assigned to each object in Collectify. Collectify automatically assigns a reference number to an object when it is first created, or you may assign your own number.

# S

**Screen saver:** A moving image or design that appears on your screen when you have not used your computer for a while.

**Status bar:** The gray area at the bottom of a window. In Collectify, the status bar indicates the default Virtual Catalog.

# T

**Taskbar:** A bar, usually located along the bottom of the Windows screen, that contains the Start button along with buttons for all open programs.

**Thumbnail:** A small copy of an image. Collectify uses thumbnails to enable you to view many images in a single window.

**Toolbar:** A row of buttons near the top of the Collectify window, just below the menubar. The buttons on the toolbar provide quick access to commonly-used tools and commands.

**Twain-compatible source:** A scanner or digital camera that uses a standard interface is a twain-compatible source of digital images. Twain-compatible digital cameras and scanners can download pictures directly into Collectify.

# V

**Viewer Window:** The Viewer Window displays the contents of the current module or module view. Viewer Windows can display lists of items or details about a single item.

**Virtual Catalog:** A Virtual Catalog is a personalized list of objects you have created for a particular purpose.

# W

**Window:** A rectangular area of the screen in which a program, such as Collectify, is displayed. A window usually has a title bar at the top and a status bar at the bottom.

# Index