MONTAGEdc®

Administrator's Guide
MONTAGEdc
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auto-graphics

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Montage Administrator's Guide

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Chapter 1. GETTING STARTED

Overview

This User Guide is intended to provide an overview of the features and functions of Montage Digital Collections. Montage Digital Collections provides and easy and efficient means of searching and viewing items in your library's digital collections.

Hardware/Software Requirements

Montage Digital Collections can be accessed by a Web-capable PC or Macintosh using a standard Internet account and a Java-enabled Web browser. No stringent hardware requirements are necessary.

System Availability

Montage Digital Collections is available 24 hours daily.

Getting Help

If you need help using Montage Digital Collections, contact Auto-Graphics' Help Desk by one of the following means:

voice: (800) 852-8686 5am ~ 5pm Pacific Time
email: HelpDesk@auto-graphics.com
fax: (909) 595-5190

The **Help** link provides access to the Montage Help Page.

About Montage Users

The system can be configured with unique user accounts intended for use by library staff. The specific role for each account is determined prior to initial implementation and is designated as one of the following user types:

> The system currently does not support authenticated access by library patrons. Access is "view only."

- Administrator – Full permission for all features and functions

- Staff – Limited to adding items

- Volunteer – Functionality not yet defined

Logging In

Authenticated users can use the **Login** link in the Navigation Bar to access expanded features and functions.

To login:

1. Click the **Login** link in the Navigation Bar on any system screen.

   - The Login dialog displays.

2. Enter your **User Name** and **Password**, then click the **Sign in** button.

> Your **User Name** and **Password** were created during system installation. For issues related to login credentials, forgotten passwords, or adding new users, contact the Auto-Graphics Help Desk (see ***Getting Help*** on page **1** for more information).

3. If your Login request is unsuccessful:

   - The message "Not an authenticated user" displays at the bottom of the dialog.

4. If your Login request is successful:

   - The system returns to the most recently accessed screen. Administrative features and functions are added to the Navigation Bar and to screens throughout the system, where applicable.
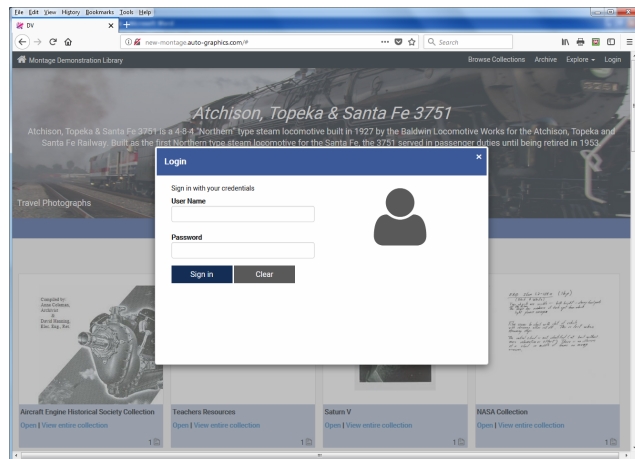
Login Screen

The Home Page

The Home Page is the initial landing page when accessing Montage. The Montage Home Page provides a logical and efficient means of performing search functions. The screens are structured to assist workflow, and contain navigational links and menus to provide "single-click" access to available features and functions.

The Home Page includes a Navigation Bar, a scrolling Banner with a "Quick Search" field, "Featured Collections" showcases, and reference information for your library.
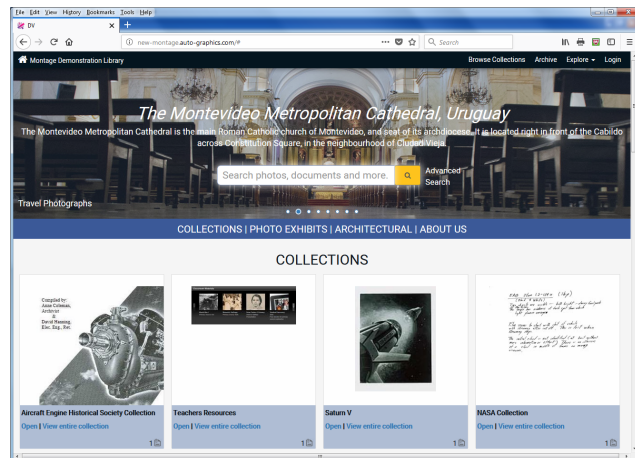
Home Page

The Navigation Bar

The Navigation Bar is shown at the top of every system screen. The Navigation Bar provides access to the following features and functions:

- **Home icon** – Click the Home icon from any screen to return to the Home Page.

- **+New**–Opens the Add New dialog, which lets you add a new record to the catalog (see ***Working with Records*** on page **23** for more information).

- **Administration** – The **Administration** menu provides access to the following features and functions:

  ○ **Add New Archive** – Opens the New Institution dialog, which lets you add a new archive to the catalog (see ***Working with Archives*** on page **19** for more information).

- ○ **Controlled Vocabulary** – Opens the Controlled Vocabulary page, which lets you manage the controlled vocabulary list for your Montage system (see *Managing Controlled Vocabulary* on page **32** for more information).

- ○ **System Settings** – Opens the System Settings dialog, which lets you configure a number of "user-selectable" operating parameters for your Montage system (see *Configuring System Settings* on page **34** for more information).

- ○ **My Lists** – Opens the My Lists screen, which lets you create and manage lists for your user account (see *Working with Lists* on page **37** for more information).

- ○ **Manage Synonyms** – Opens the Manage Synonyms page, which lets you manage the synonyms list for your Montage system (see *Managing Synonyms* on page **39** for more information).

- ○ **Statistics** – Displays database and usage statistics for your Montage system (see *Viewing Statistics* on page **41** for more information).

- • **Browse Collections** – Opens the Browse Collections screen, which lets you use a hierarchical list of archives and collections to browse the database (see *Browsing* on page **5** for more information).

- • **Archive** – Opens the Archive screen, which lets you view a full list of all the institutions in the system (see *Browsing* on page **5** for more information).

- • **Explore** – The **Explore** menu lets you browse the Montage database according to a selected pre-defined heading (see *Exploring* on page **6** for more information).

  - ○ **Collection** – Opens the Collections screen, which lets you view a full list of all the collections in the system.

  - ○ **Topics** – Opens the Topics screen, which lets you view a full list of terms entered in the Subject field of all records in the system.

  - ○ **Year** – Opens the Year screen, which lets you view a full list of years entered in the Date field of all records in the system.

  - ○ **Places** – Opens the Places screen, which lets you view a full list of terms entered in the Coverage field of all records in the system.

  - ○ **Formats** – Opens the Formats screen, which lets you view a full list of terms entered in the Format field of all records in the system.

  - ○ **Advanced Search** – You can also access the **Advanced search** screen from the **Explore** menu (see *Advanced Search* on page **7** for more information).

- • **Login / Logout –** The **Login** link displays the Login screen, which lets you to access the system as an authenticated user (see *Logging In* on page **1** for more information). The **Logout** link lets you log pit of the system (see *Logging Out* on page **4** for more information).

The Home Page Banner

A scrolling Banner is located below the Navigation Bar. The Banner is generally used to highlight collections or items from your library's catalog. The Banner scrolls automatically every eight seconds. Alternately, the scroll buttons can be used to scroll the Banner manually. You can add, edit and delete banners as desired (see *Working with Banners* on page **30** for more information).

Quick Search

A "Quick Search" text box is provided in the Banner. "Quick Search" lets you perform a full text search of all metadata in the system (see *Quick Search* on page **6** for more information), and includes an **Advanced**

Search link that provides access to the Advanced Search screen (see *Advanced Search* on page **7** for more information).

Link Bar

The Home Page includes a Featured Collections showcase, and (optionally) one or more Featured Items showcases. A Link Bar located below the Banner contains links to the Home Page showcases and the About Us section.

Featured Collections Showcase

The **COLLECTIONS** link scrolls the Home Page to the Featured Collections showcase. The Featured Collections showcase can be configured to display up to eight Archives or Collections of special interest to your library's patrons (see *Managing the Featured Collections Showcase* on page **44** for more information).

Featured Items Showcases

The Featured Items Showcase links scroll the Home Page to the associated Featured Items showcase. Your library's Home Page can include one or more Featured Items showcases. Featured Items showcases are populated using saved lists of records. These showcases, and their labels, are initially configured for your Montage system by Auto-Graphics. They cannot be added or deleted locally. The content of the showcases, however, is completely under local control (see *Managing Featured Items Showcases* on page **44** for more information).

Logging Out

To log out:

- Click the **Logout** link in the Navigation Bar.
  - ○ The Home Page displays.

Organization of the Guide

This Quick Reference Guide is designed to provide an overview of the features and functions available with Montage Digital Collections. The Guide is divided into three chapters, as follows:

Chapter 1 – Getting Started. This chapter explains how to prepare to use Montage Digital Collections. The chapter includes hardware/software requirements, system availability, and system Login and Logoff.

Chapter 2 – Searching. This chapter provides procedures to search the Montage database to locate items of interest.

Chapter 3 – Viewing Search Results. This chapter provides procedures to view and modify search results and view Full Displays for selected items.

Chapter 4 – System Administration. This chapter provides procedures for configuring system settings and maintaining the Montage database.

Chapter 2. SEARCHING

Montage Digital Collections provides three search options: Browse and Explore, Quick Search and Advanced Search.

Browsing

Montage provides two options for browsing the system; **Archive** and **Browse Collections**.

To browse Archives:

- Select **Archive** in the Navigation Bar.
    - An Archive List displays.

- The Archive List banner shows the number of currently displayed Archives and total number of Archives in the system.

- The Archive List includes a "thumbnail" illustration and name for each archive, and may include a brief description of the archive.

- If desired, use the **Sort by** options to re-sort the list alphabetically (**A-Z**), in reverse alphabetic order (**Z-A**), or by **Relevance** (alphabetically). **Relevance** is the *default* sort order.
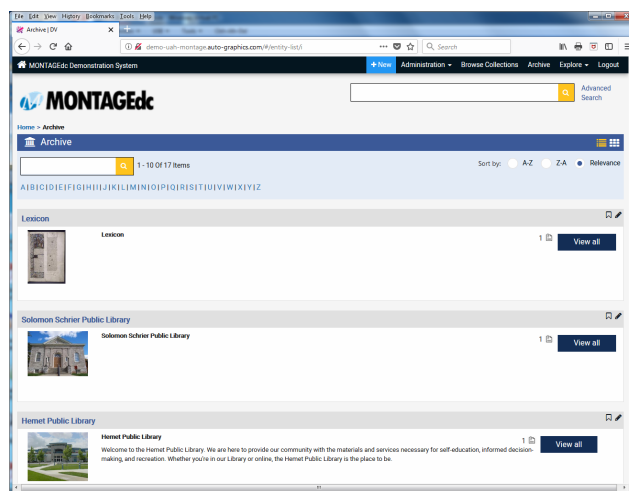
Archive List

- Use the scroll bar to view the entire list. When you reach the bottom of the screen, the system adds additional archives to the list automatically.

  If additional archives are not added automatically, click the **Load more** button to load additional archives.

- If desired, use the "alphabet" links to narrow the scope of the list:
    - Click an "alphabet" link to display *only* those Archives that begin with the selected letter.
    - To return to the *full* list, click the link again.

- If desired, use the "search" function to narrow the scope of the list to only those entries that contain a specified term.
    - Enter your search term in the search box in the banner (you can use a complete or partial word as your search term), then click the 🔍 button.
    - The list refreshes to show only those Archives that contain the search term.
    - Click the ⊗ button to clear the search box, then click the 🔍 button to return to the full list.

- Click a "thumbnail" for an Archive to view the Archive Detail Page (see *Viewing the Archive Detail Page* on page **9** for more information).

- Click the **View All** button for an archive to display a Brief Browse List for the archive (see *Viewing the Brief Browse List* on page **12** for more information).

To browse Collections:

- Select **Browse Collections** in the Navigation Bar.

  ○ The Browse Collections screen displays. The screen shows a hierarchical list of archives, collections and sub-collections. Use the scrollbar to view the entire list.

  ○ Click an arrow next to a level in the list to expand the level. Click again to collapse the level.

  ○ The number in parentheses following an entry name shows the number of subordinate levels for the associated upper level.
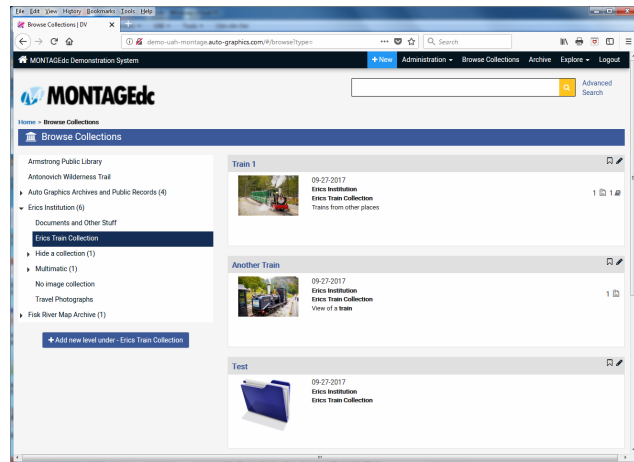
- Select an entry in the list to view a Browse List for the selected level.

Browse Collections Screen

- The Browse List includes a "thumbnail" illustration and name for each entry in the list, and may include a brief description of the entry.

- Click the **View All** button for an entry to display a Brief Browse List for the entry (see *Viewing the Brief Browse List* on page **12** for more information).

- Click a title in the list to view the Collection Detail Page for the Collection (see *Using the Collection Detail Page* on page **10** for more information).

Exploring

Use the **Explore** menu in the Navigation Bar to browse the database according to a pre-defined heading:

Collection – Lets you view a full list of Collections in the system.

Topics – Lets you view a full list of terms entered in the Subject field of all records in the system.

Year – Lets you view a full list of years entered in the Date field of all records in the system.

Places – Lets you view a full list of terms entered in the Coverage field of all records in the system.

Formats – Lets you view a full list of terms entered in the Format field of all records in the system.

To use Explore:

- Select the desired heading from the **Explore** menu.

  ○ When you select **Collection** from the **Explore** menu, a Collections List displays (see *Using the Collections List* on page **9** for more information).

  ○ When you select **Topics**, **Year**, **Places** or **Formats** from the **Explore** menu, a Term List for the selected heading displays (see *Using the Term List* on page **11** for more information).

Quick Search

You can perform a Quick Search from the banner on the Home Page, or from the header on any other screen in the system.

To perform a Quick Search:

When you perform a Quick Search, the system performs a full text search of all the indexed metadata in the system.

- Enter your search term in the Quick Search text box (you can use a complete or partial word as your search term).
  - You can also use the wildcard character "**?**" in your search term.
- Click the [q] button to submit your search.
  - A Brief Browse List of items that match your search term displays (see *Viewing the Brief Browse List* on page **12** for more information).

Advanced Search

Advanced Search lets you create "search queries" using the logical (Boolean) functions '**And**' and '**Or**', with multiple keyword combinations, across multiple search headings.

Authenticated users (library staff) can also search the system by **Id** number, **Old Id** number, or **Code** number. The **Id** and **Code** numbers are assigned by the Montage system. The **Old Id** is taken from optional metadata when importing records from another system.
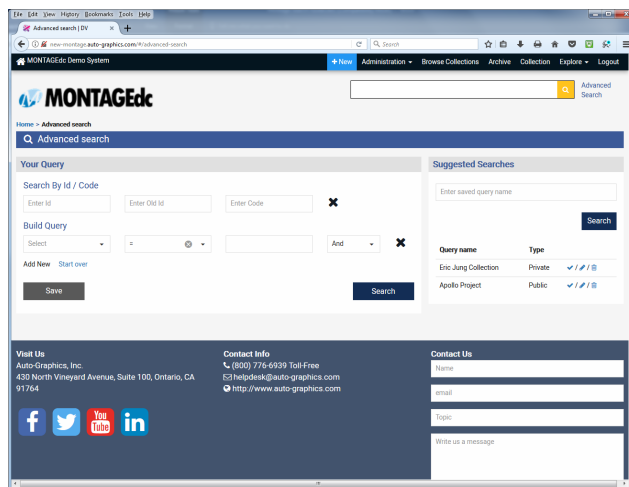
To search by Id or Code number:

Search by Id/Code number functionality is available to authenticated users *only*.

- Select **Advanced Search** from the **Explore** menu in the Navigation Bar, or, click the **Advanced Search** link next to the Quick Search text box.
  - The Advanced Search screen displays.
- Enter the desired number in the **Enter Id**, **Enter Old Id** or **Enter Code** text box, as appropriate, then click the **Search** button to submit your search.

  Id/Code numbers can be viewed from the Add/Edit Item screen for any record in the system (see *Working with Records* on page **19** for more information).

  - A Brief Browse List of items that match your search term displays (see *Viewing the Brief Browse List* on page **12** for more information).


Advanced Search Screen

To create an advanced search query:

1. Select **Advanced Search** from the **Explore** menu in the Navigation Bar, or, click the **Advanced Search** link next to the Quick Search text box.

   - The Advanced Search screen displays.

2. Enter the *first* term of your "search query":

   - Select the field you wish to search from the "Select field" menu.

   - Select the desired matching criteria from the "Select operator" menu:

     ○ **=** (equals) – search results will include items in which the selected field *is* an *exact match* to the search term specified.

     ○ **Like** - search results will include items in which the selected field *is similar* to the search term specified.

     ○ **Start with** - search results will include items in which the selected field *starts with* the search term specified.

     ○ **End with** - search results will include items in which the selected field *ends with* the search term specified.

   - Enter the search term in the "Search term" text box (you can use a complete or partial word as your search term).

   - Select the logical operator to be applied between the "first term" and "second term" of your search query; **And** or **Or**.

     ○ An *additional* data entry line displays,

3. Repeat step **2** to add *additional* terms to your search query.

4. When all desired search terms have been entered, click the **Search** button to submit your search.

   - A Brief Browse List of items that match your search term displays (see *Viewing the Brief Browse List* on page **12** for more information).

Chapter 3. VIEWING SEARCH RESULTS

Viewing the Archive Detail Page

The Archive Detail Page is displayed when you select a "thumbnail" on an Archive List (see ***Browsing*** on page **5** for more information).

- The Archive Detail Page banner shows the name of the collection, a representative thumbnail, and may include a brief description of the Archive.

- The **Details** section at the bottom of the page shows the detailed item information for the archive.

- Click the **View all** button to open a Brief Browse List of collections, records and items associated with the archive (see ***Viewing the Brief Browse List*** on page **12** for more information), or you can use the "search" function to narrow the scope of the list.

Archive Detail Page

   ○ Enter the term you want to find in the **Search** box. You can use a complete word or a partial word as your search term.

   ○ Click the [🔍] button to submit the search. A Brief Browse List opens, showing only those entries that contain your search term (see ***Viewing the Brief Browse List*** on page **12** for more information).
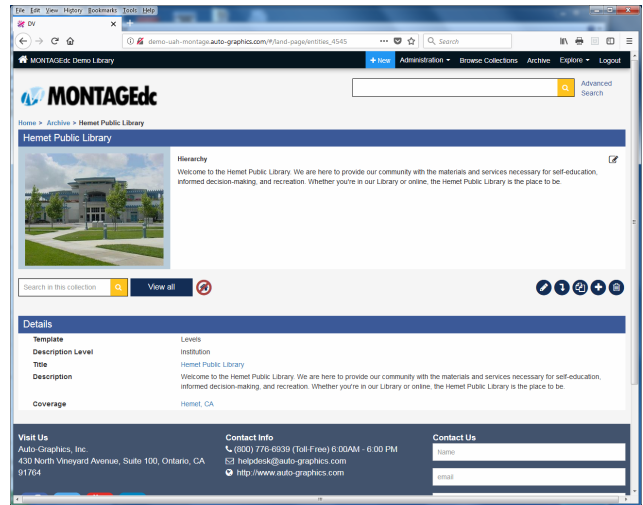
If you are accessing the system as an unauthenticated user, the Archive Detail Page includes additional options for adding and editing records and items (see ***Chapter 4. SYSTEM ADMINISTRATION*** on page **19** for more information).

Viewing Explore Results

Depending on the heading selected when using the **Explore** menu, the system will display a Collections List or a Term List.

Using the Collections List

The Collections List is shown when you select **Collection** from the **Explore** menu in the Navigation Bar.

- The Collections List banner shows the number of currently displayed collections along with the total number of collections associated with the selected heading (e.g., **1 - 10 Items Of 27 Total**).

- The Collections List shows the name, brief description, and representative thumbnail for each collection.

○ Use the scroll bar to view the entire list. When you reach the bottom of the screen, the system adds additional collections to the list automatically.

If additional collections are not added automatically, mouse over the **Load more** button to load additional collections.

- If desired, use the **Sort by** options to re-sort the list alphabetically (**A-Z**), in reverse alphabetic order (**Z-A**), or by **Relevance** (alphabetically). **Relevance** is the *default* sort order.

- If desired, use the "alphabet" links to narrow the scope of the list:

  ○ Click an "alphabet" link to display *only* those Collections that include a word that begins with the selected letter.
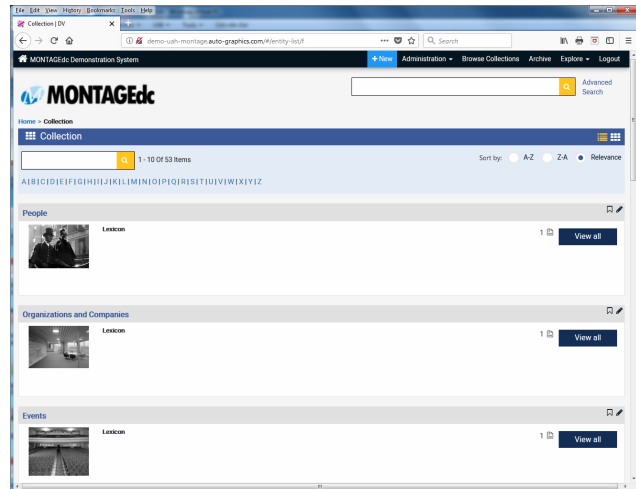
  ○ To return to the *full* list, click the link again.

- If desired, you can use the **Search** function to narrow the scope of the list (see *Narrowing Results* on page **11** for more information).

Collections List

- Click a title in the list to view the Collection Detail Page for the associated collection (see *Using the Collection Detail Page* on page **10** for more information).

- Click the **View all** button for a collection to view a list of items associated with the collection (see *Viewing the Brief Browse List* on page **12** for more information).

Using the Collection Detail Page

The Collections Detail Page is shown when you select a collection name from a Collections List.

- The Collections Detail Page banner shows the name of the collection, a representative thumbnail, and may include a brief description of the collection.

- The **Details** section at the bottom of the page shows the detailed item information for the collection.

- If desired, you can use the **Search** function to narrow the scope of the list (see *Narrowing Results* on page **11** for more information).

- Click the **View all** button to view a Brief Browse List of all items included in the collection (see *Viewing the Brief Browse List* on page **12** for more information).
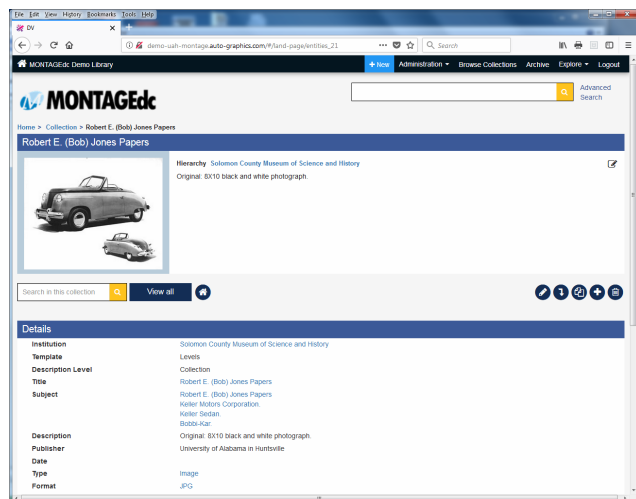

Collections Detail Page

- Click an item in the showcase to view the Full Display for the item (see *Viewing the Full Display* on page **13** for more information).

> If you are accessing the system as an unauthenticated user, the Collection Detail Page includes additional options for adding and editing records and items (see *Chapter 4. SYSTEM ADMINISTRATION* on page **19** for more information).

Using the Term List

A Term List is shown when you select the **Topics**, **Year**, **Places** or **Formats** from the **Explore** menu in the Navigation Bar.

- The Term List banner shows the number of currently displayed terms along with the total number of terms associated with the selected heading (e.g., **1 - 50 Items Of 270 Total**).

- The Term List shows a list of terms associated with the selected heading. Each term in the list shows the number of items associated with the term.

    ○ In the case of long (truncated) titles, position the cursor over a title to view the complete title.

- Use the scroll bar to view the entire list. When you reach the bottom of the screen, the system adds additional terms to the list automatically.

Term List

    ○ If additional terms are not added automatically, mouse over the **Load more** button to load additional items.

- If desired, use the **Sort by** options to re-sort the list alphabetically (**A-Z**), in reverse alphabetic order (**Z-A**), or by **Relevance** (alphabetically). **Relevance** is the *default* sort order.

- If desired, use the "alphabet" links to narrow the scope of the list:

    ○ Click an "alphabet" link to display *only* those terms that contain a word that begins with the selected letter.

    ○ To return to the *full* list, click the link again.

- If desired, you can use the **Search** function to narrow the scope of the list (see *Narrowing Results* on page **11** for more information).

- Click a term to view a list of items associated with the term (see *Viewing the Brief Browse List* on page **12** for more information).
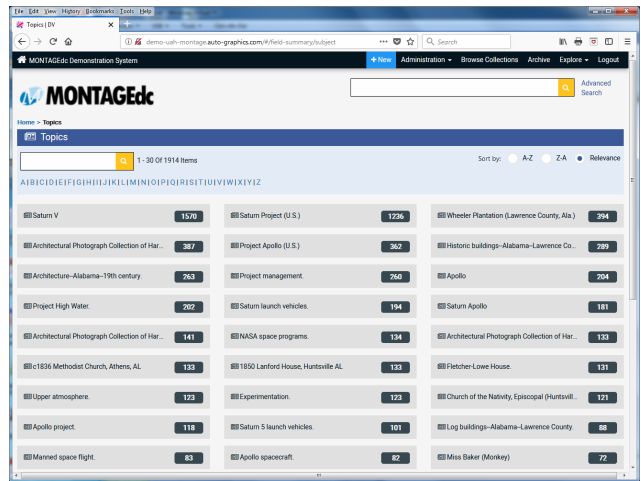
Narrowing Results

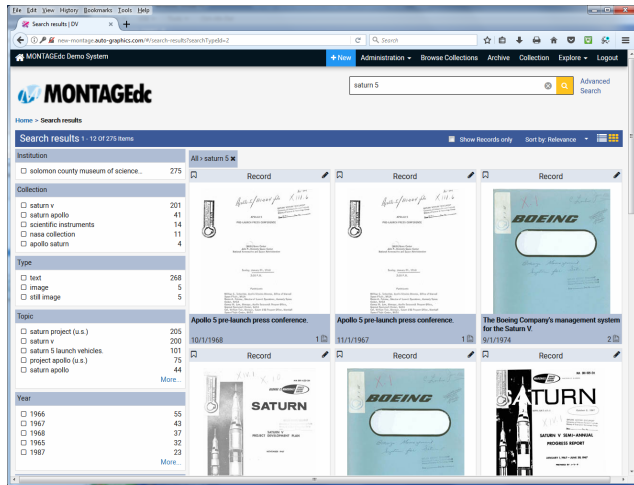You can use the **Search** function to narrow the scope of a list to only those entries that contain a specified term.

- Enter your search term in the **Search** box (you can use a complete or partial word as your search term), then click the 🔍 button.

  ○ The list refreshes to show only those entries that contain the search term.

- Click the ✖ button to clear the search box, then click the 🔍 button to return to the full list.
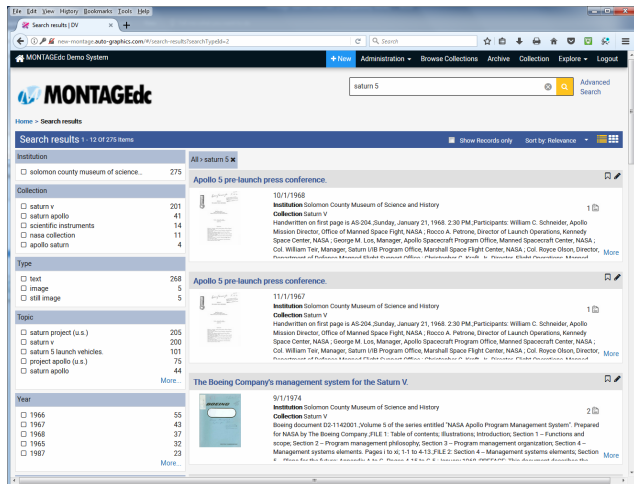
Viewing the Brief Browse List

A Brief Browse List is shown following a Quick Search (see *Quick Search* on page **6** for more information) or Advanced Search (see *Advanced Search* on page **7** for more information), by selecting a link from a Term List (see *Using the Term List* on page **11** for more information), or by selecting **View all** from a Collections List (see *Using the Collections List* on page **9** for more information).

- The Brief Browse List banner shows the number of currently displayed items and total number of items in the list (e.g., **1 - 50 Items Of 270 Total**). The search term is shown in the "breadcrumbs" trail at the top of the list.

- The Brief Browse List may be viewed in one of two formats; "Grid" view or "List" view.

  ○ Click the ⊞ button to display the Brief Browse List in "Grid" view.

  ○ Click the ☰ button to display the Brief Browse List in "List" view.

- Select the **Show Items** checkbox to limit the search results to items only. Select the **Show files** checkbox to limit the search results to records only.

  ○ When both the **Show Items** and **Show files** checkboxes are selected, search results will contain records and items.

- Use the **Sort by** menu to select the desired sort order for the list; **Relevance**, **Title**, **Date(asc)** or **Date(desc)**.

Brief Browse List – "Grid" Format

Brief Browse List – "List" Format

- Use the scroll bar to view the entire list. When you reach the bottom of the screen, the system adds additional items to the list *automatically*.

  ○ If additional items are not added automatically, mouse over the **Load more** button at the bottom of the page to load additional items.

- When viewing the Brief Browse List in "Grid" view, position the cursor over a title to view a brief description of the associated item.

- If desired, you can use the filters in the left column of the Brief Browse List to narrow the scope of the list (see *Limiting Your Search* on page **13** for more information).

- Click a title to view the Full Display for the associated item (see *Viewing the Full Display* on page **13** for more information).

Limiting Your Search

The filters shown in the left column of the Brief Browse List let you narrow the search results based on categories (facets) found within the results set. Facets can be cumulatively applied to a results set in any order.

To use Filter Your Results:

1. Use **Quick search** or **Advanced Search** to perform a search, or click a link on a Term List.

   - A Brief Browse List displays.

2. Filters are shown in the left panel of the Brief Browse List.

   - The Filters panel shows a series of categories, such as **Collection** or **Creator**, with a list of filters under each heading. Each filter shows the number of items associated with the filter.

   - Click the **More** link for a heading to display *additional* filters for the heading.

Limit Your Results Panel

3. Select the checkbox for a filter to limit the search results to *only* those items associated with the selected filter.

   A logical OR is applied to filters *within* a category. A logical AND is applied to filters *between* categories.

   - The Brief Browse List refreshes to show only those items associated with the selected filter, and the Filters panel refreshes to show *only* those categories and filters available for the "filtered" results set.

   - The selected filter is added to the "filter" string at the top of the Brief Browse List.

4. Select *additional* filters from the Filters panel, as desired, to "drill down" further into the results set.

5. To *remove* a filter, click the **X** button for the desired filter in the "filter" string at the top of the Brief Browse List, or, unselect the checkbox in the Filters panel.

Viewing the Full Display

The Full Display includes additional options when logged in as administrative staff (see *Chapter 4. SYSTEM ADMINISTRATION* on page **19** for more information).

The Full Display is a multi-pane display that provides complete information about the selected item.

- The left panel of the Display shows thumbnails for all files associated with the record.

- Select a thumbnail from the left panel to display the selected file in the preview area.

- Click the **T** **Transcript** button in the left panel to view a transcript for the currently selected file, if available. Click the **Thumbnails** button to return to the thumbnails display.

- The right panel shows the archive and collection in which the record resides, and includes a **RECORD OVERVIEW** and **DIGITAL FILE INFORMATION**.

  ○ Click a link in the right panel perform a "follow on" search using the selected term or value.

- The right panel also includes social media icons that let you share the associated content through your account on various social media platforms. Select an icon for **f** Facebook, **y** Twitter, **in** Linked In or **G+** Google+. To locate *additional* platforms:

  ○ Move your cursor over the **+** icon and select **More** to access a list of all available platforms.

Full Display

Available Platforms

  ○ Enter the first few characters of a platform name in the Find a service field to locate the desired platform.

  ○ Click the appropriate icon, then log into your account as necessary.

- If the Full Record was accessed from a Brief Browse List, you can use the browse buttons to view other records from the results set.

- The lower panel shows three tabs; **Details**, **Description**, and **Items**. The **Details** tab shows the metadata for the record. Clicking a link on the **Details** tab will perform a "follow on" search using the selected term or value. The **Descriptions** tab provides a description of record content.

- You can view the **Items** tab in one of two formats; "Grid" view, which is the default view, or "List" view.

  ○ Click the button to display the **Items** tab in "List" view.

  ○ Click the button to display the **Items** tab in "Grid" view.

- If desired, use the **Sort by** options to re-sort the **Items** tab alphabetically (**A-Z**), in reverse alphabetic order (**Z-A**), or by **Relevance** (alphabetically). **Relevance** is the *default* sort order.

- If desired, you can use the **Search** function to narrow the scope of the list (see *Narrowing Results* on page **11** for more information).
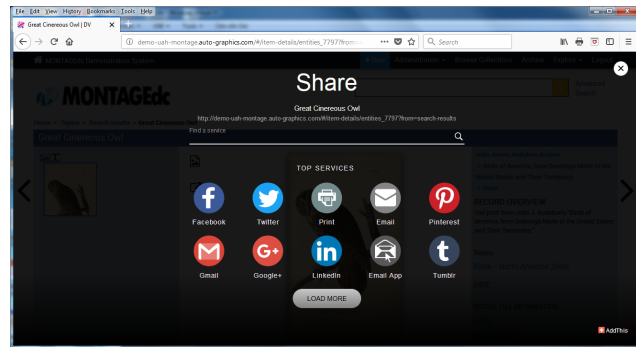
- The remainder of the **Items** tab is similar to the left and center panels of the Full Display, as described above.

To view an image file:

When you select the thumbnail for an "image" file, the selected image displays in the preview window.

- Click the ⬀ **Open in new window** button to open the file in a new browser tab or window.

  ○ When you move your cursor over the image, the "magnifying tool" displays. Click the left mouse button once to enlarge the image. Click the button again to return the image to its original size.

  ○ Close the browser tab or window to return to the Montage Full Display.

- Click the 🖼 **Open in viewer** button to open the currently displayed image in the Image Viewer.

  ○ The upper left corner of the screen shows the sequence number of the currently displayed image file, and the total number of image files associated with the Full Display.

  ○ The Image Viewer Toolbar is shown in the upper right corner of the screen.

  ○ Use the ⬅ and ➡ **Scroll** buttons to scroll forward and backward through the available images.

  ○ When you move your cursor over the image, the "magnifying tool" displays. Click the left mouse button once to enlarge the image. Click the button again to return the image to its original size. You can also use the 🔍 **Magnifying Tool** in the Toolbar to change the image magnification.

  ○ Use the ▦ **Toggle Screen** button toggles the display between the "full screen" and "normal" modes.

Image Viewer

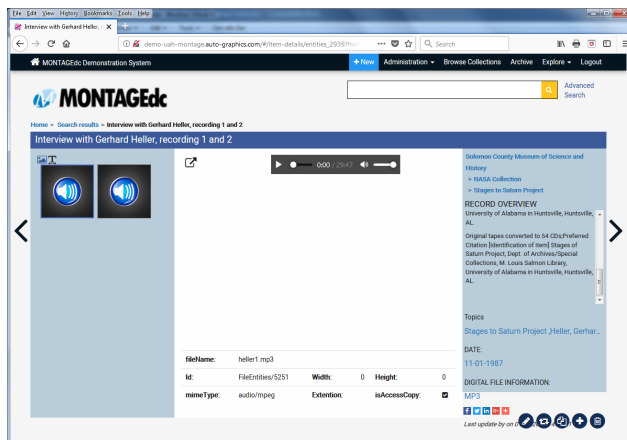 ○ Click the ✕ **Close** button to close the Image Viewer and return to the Full Display.

To playback an audio file:

When you select the thumbnail for an "audio" file, a "player" for the file displays in the preview window.

- If desired, click the ⬀ **Open in new window** button to open the player in a new browser tab or window.

- Use the ▶ **Start** and ⏸ **Stop** buttons to start and stop playback of the file. Use the "playback slider" to scroll the file to a desired location.

  ○ The player shows the total length of the audio file, and the elapsed play time for the file.


Audio Player

Montage Administrator's Guide

- Use the 🔊 Speaker button to mute or unmute the speakers. Use the "volume slider" to set the playback volume to the desired level.

- If necessary, close the browser tab or window to return to the Full Display.

To playback a video file:

When you select the thumbnail for a "video" file, a "player" for the file displays in the preview window. Move your cursor over the preview image to view the player controls.

- Use the ▶ **Start** and ⏸ **Stop** buttons to start and stop playback of the file. Use the "playback slider" to scroll the file to a desired location.

  ○ The player shows the total length of the video file, and the elapsed play time for the file.

- Use the 🔊 Speaker button to mute or unmute the speakers. Use the "volume slider" to set the playback volume to the desired level.

- If desired, click the ⛶ Full Screen button to place the player in "full screen" mode.

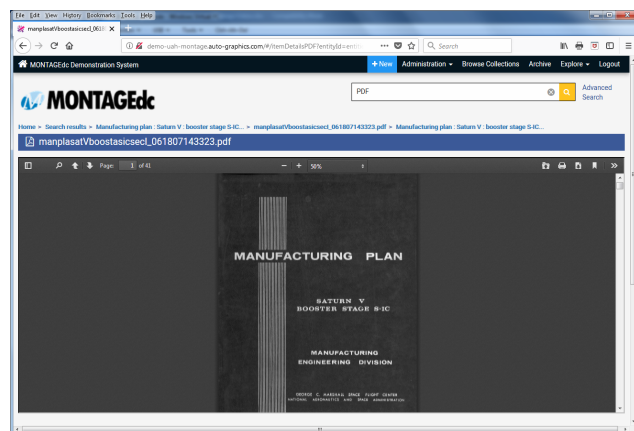 ○ Click the button again to return to the Full Display.
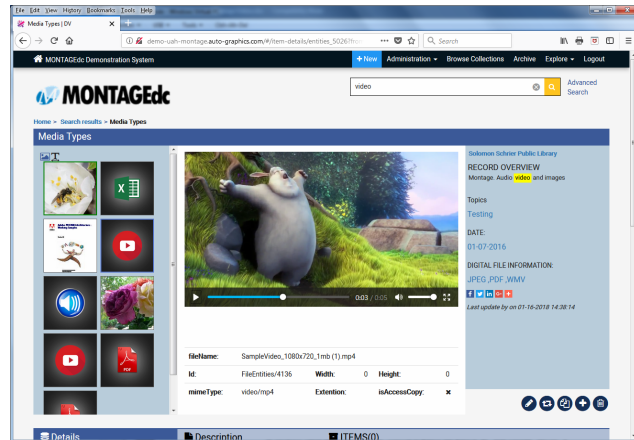
Video Player

To view a PDF file:

When you select the thumbnail for a "PDF" file, a "PDF Viewer" for the file displays in the preview window.

- If desired, click the ↗ **Open in new window** button to open the viewer in a new browser tab or window.

- Use the ▥ **Toggle Sidebar** button to open and close the sidebar.

  ○ The sidebar lets you view "thumbnails" for each page of the PDF file, as well as the document outline or file attachments, if available.

- Click the 🔍 **Search** button to perform a "full text" search of the PDF file.

  ○ Enter the term you wish to search for in the **Find** text box.

PDF Viewer

  ○ To highlight all occurrences of your search term in the file, select the **Highlight all** checkbox.

  ○ To find only those occurrences that match your search term by upper- and lower-case as you typed it, select the **Match case** checkbox.

- ○ Use the ⬅ and ➡ **Scroll** arrows to scroll forward and backward through all occurrences of your search term.

- ○ Click the 🔍 **Search** button again to close the search entry fields.

- Use the ⬆ **Previous page** and ⬇ **Next page** buttons to scroll backward and forward through the file, or enter the desired page number in the **Page** text box, then press the **<Enter>** key.

- Use the ➕ and ➖ buttons to increase and decrease the magnification of the file, or, select a preset value from the drop-down menu.

- Click the 🖨 **Print** button to print the file.

- Click the ⬇ **Download** button to download the file.

- Click the ≫ **Tools** button to display the "Tools Menu."

  - ○ The "Tools Menu" lets you scroll to the first page or last page of the file, rotate the file clockwise or counterclockwise, and view Document Properties.

  - ○ You can also enable and disable the "Hand Tool." The "Hand Tool" lets you click and drag to scroll the PDF file.

- Click the link at the top of the screen to return to the Full Display.

To view a "native" document file:

In some cases, a Full Display may include a "native" file for a software application, such as a Microsoft Word or Excel document. To view a "native" file, you must download the file to your computer. You will also need to have a copy of the application that created the computer available.

When you select the thumbnail for a "native" file, the name of the file displays in the preview window.

- Click the ⬇ **Download** button.

  - ○ A standard File Download dialog displays.

- Choose the "open" option to view the file immediately, or choose the "save" option to save the file to your local computer, then click **OK**.

  - ○ If you select the "save" option, a standard "Save As" dialog displays.

  - ○ If desired, change the file name, then browse to the location in which you wish to save the file and click **Save**.

Chapter 4. SYSTEM ADMINISTRATION

Database Arrangement - The ISAD(G) Hierarchy

Montage is organized based on the General International Standard Archival Description (ISAD(G)) hierarchy as shown below.
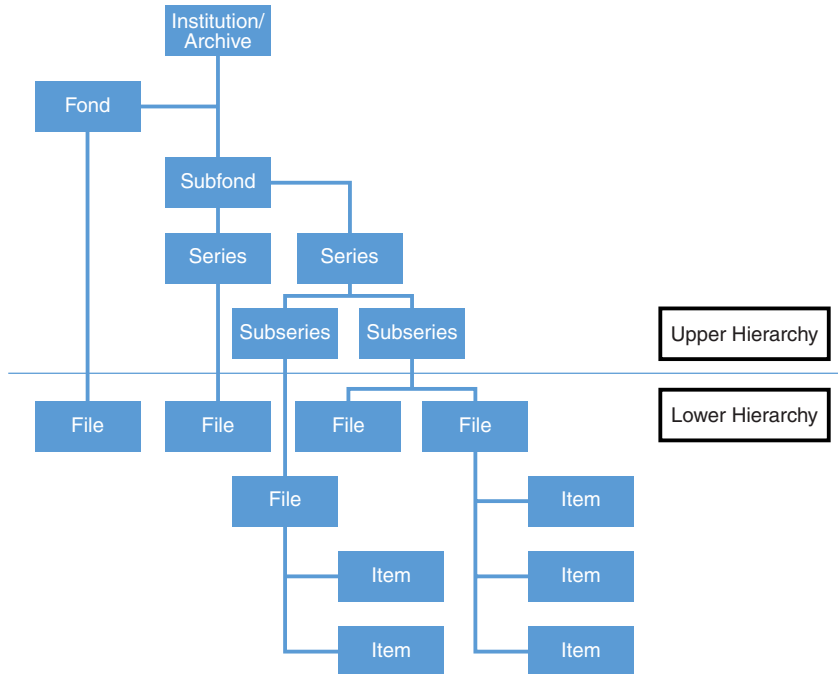
The **Archive / Fond / Subfond / Series / Subseries** constitute the **Upper Hierarchy**; the **File / Items** constitute the **Lower Hierarchy**. A file or item can be added at any level in the "upper" hierarchy. The specific implementation for a system depends in part on the number of institutions contributing to the system and the desired structure of collections and sub-collections.

Working with Archives

The archive, or institution, is the uppermost level of the Montage hierarchy. An archive can be further organized into collections and sub-collections, and each of these levels can contain individual records.

To create an archive:

1. Select **Add New Archive** from the **Administration** menu.

   - The New Institution dialog displays.

New Institution Dialog

- The **Template** field lists the available templates for your Montage system.

2. Select the radio button for the **Template** you wish to use to define the archive.

3. Enter the archive name in the **Title** text box.

4. Click the **Save** button to save the archive.

  - The New Institution dialog closes, and the Add/Edit Institution screen displays.

  - The name of the archive is shown in the top banner.

  - Reference information for the archive is shown below the banner; including the system-assigned **ID, Code** for the archive; the current **Status** of the archive (**New** or **Approved**); the **Template** used for the archive, the current **Access Level** for the archive (**Guest**, **Patron**, **Volunteer**, **Classified**, **Staff** or **Admin**), and the **Description Level** (e.g., **Archive**, **Collection**, **Record**, etc.).
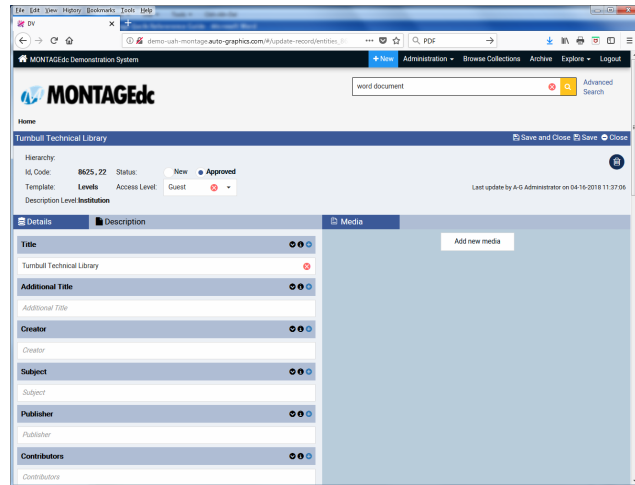
Add/Edit Institution Screen

  The default status for a new archive is established using the **System Settings** function available through the **Administration** menu (see *Configuring System Settings* on page **34** for more information).

  - To change the current status for the archive, select the radio button for the desired status; **New** or **Approved**.

  - To change the **Access Level** for the archive, select the desired level from the drop-down menu; **Guest**, **Patron**, **Volunteer**, **Classified**, **Staff** or **Admin**. If you do not wish to specify an access level at this time, click the ⊗ icon.

5. Click the **Details** tab to enter details for the Archive.

  - The **Details** tab contains a series of text fields determined by the template selected when the archive was created.

  - The title bar for each field contains three buttons:

    - Use the ⊙ **Open/Close** button to collapse and expand the field.

    - Use the ⓘ **Information** button displays a description of the content required by the field.

    - Use the ⊕ **Add New Entry** to add a new data entry line for the field when multiple entries are necessary.

  - Initially, only the **Title** field contains information; the name of the archive. Enter the appropriate information in the remaining data fields. *All fields are optional*.

6. Click the **Description** tab to enter a description for the archive.

  - The Description tab includes a WSIWYG editor that lets you apply a variety of formatting and styles to your text.

7. If desired, add one or more media files to the archive (see *Working with Media* on page **24** for more information).

8. Save the Archive to the database:

   - Click **Save and Close** to save the new archive to the database and close the Add/Edit Institution screen.

     ○ The Archives screen displays.

   - Click **Save** to save your changes to the database and continue editing the Archive.

   - Click **Close** to close the Add/Edit Institution screen *without* saving the Archive.

Working with Levels

You can add a new level to any part of the hierarchy.

To add a level:

1. Select **Browse Collections** in the Navigation Bar.

   - The Browse Collections screen displays. The screen shows a hierarchical list of archives, collections and sub-collections. Use the scrollbar to view the entire list.

   - Click an arrow next to a level in the list to expand the level. Click again to collapse the level.

   - The number in parentheses following an entry name shows the number of subordinate levels for the associated upper level.

2. Locate and select the Archive, Collection, or Sub-collection ("parent" level) to which you wish to add a new level ("child" level).

3. Click the **Add new level under** button.

   - An Add New Level dialog displays.

   - The **Add record to** field shows the name of the selected "parent" level.

   - The **Template** field lists the available templates for your Montage system.

4. Select the radio button for the **Template** you wish to use to define the level.
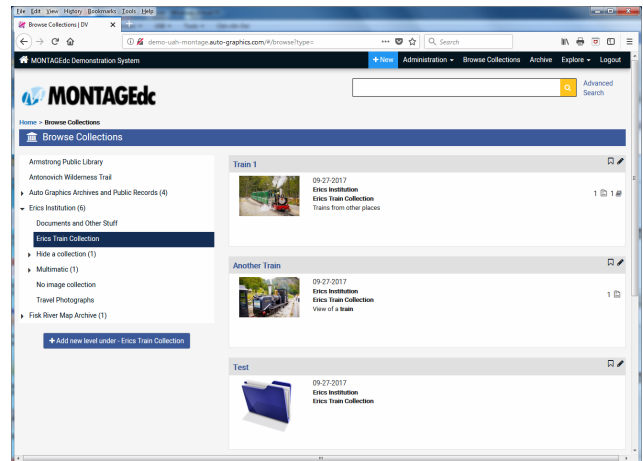

Browse Collections Screen
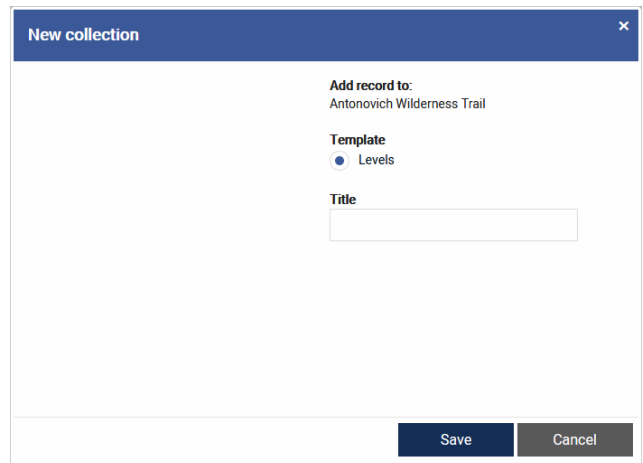
Add New Level Dialog

5. Enter a name for the level in the **Title** text box.

6. Click the **Save** button to save the level.

- The Add New Level dialog closes, and the Add/Edit Level screen displays.

- The name of the level is shown in the top banner.

- Reference information for the archive is shown below the banner; including the **Hierarchy** (the "parent" level), the system-assigned **ID, Code** for the archive; the current **Status** of the archive (**New** or **Approved**); the **Template** used for the archive, the current **Access Level** for the archive (**Guest**, **Patron**, **Volunteer**, **Classified**, **Staff** or **Admin**), and the **Description Level** (e.g., **Archive**, **Collection**, **Record**, etc.).
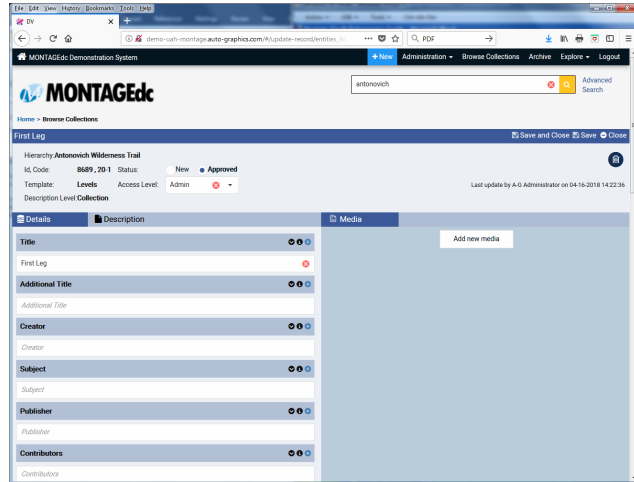
Add/Edit Level Screen

The default status for a new level is established using the **System Settings** function available through the **Administration** menu (see *Configuring System Settings* on page **34** for more information).

  ○ To change the current status for the level, select the radio button for the desired status; **New** or **Approved**.

  ○ To change the **Access Level** for the level, select the desired access level from the drop-down menu; **Guest**, **Patron**, **Volunteer**, **Classified**, **Staff** or **Admin**. If you do not wish to specify an access level at this time, click the ⊗ icon.

7. Click the **Details** tab to enter details for the level.

- The **Details** tab contains a series of text fields determined by the template selected when the archive was created.

- The title bar for each field contains three buttons:

  ○ Use the ⊙ **Open/Close** button to collapse and expand the field.

  ○ Use the ⓘ **Information** button displays a description of the content required by the field.

  ○ Use the ⊕ **Add New Entry** to add a new data entry line for the field when multiple entries are necessary.

- Initially, only the **Title** field contains information; the name of the level. Enter the appropriate information in the remaining data fields. *All fields are optional*.

8. Click the **Description** tab to enter a description for the level.

- The Description tab includes a WSIWYG editor that lets you apply a variety of formatting and styles to your text.

9. If desired, add one or more media files to the level (see *Working with Media* on page **24** for more information).

10. Save the level to the database:

- Click **Save and Close** to save the new level to the database and close the Add/Edit Level screen.

  ○ The Browse Collections screen displays.

- Click **Save** to save your changes to the database and continue editing the level.

- Click **Close** to close the Add/Edit Level screen *without* saving the level.

Working with Records

You can add records at any level of the hierarchy.

To add a record:

1. Click the [+ New] button in the Navigation Bar.

- The Add New Record dialog displays. The dialog shows a hierarchical list of archives, collections and sub-collections. Use the scrollbar to view the entire list.

- Click an arrow next to a level in the list to expand the level. Click again to collapse the level.

- The number in parentheses following an entry name shows the number of subordinate levels for the associated upper level.

Add New Record Dialog

- The **Template** field lists the available templates for your Montage system.

2. Locate and select the Archive, Collection, or Sub-collection to which you wish to add a record.

- The **Add record to** field refreshes to show the name of the selected level.

3. Select the radio button for the **Template** you wish to use to define the record.

4. Enter a name for the record in the **Title** text box.

5. Click the **Save** button to save the record.

- The Add New Record dialog closes, and the Add/Edit Record screen displays.

- The name of the record is shown in the top banner.

Add/Edit Record Screen

- Reference information for the record is shown below the banner; including the **Hierarchy** (the Archive>Collection>Sub-collection with which the record is associated, as applicable), the system-assigned **ID, Code** for the archive; the current **Status** of the archive (**New** or **Approved**); the **Template** used for the archive, the current **Access Level** for the archive (**Guest**, **Patron**, **Volunteer**, **Classified**, **Staff** or **Admin**), and the **Description Level** (**Record**).

  The default status for a new record is established using the **System Settings** function available through the **Administration** menu (see *Configuring System Settings* on page **34** for more information).

  - To change the current status for the level, select the radio button for the desired status; **New** or **Approved**.

  - To change the **Access Level** for the level, select the desired access level from the drop-down menu; **Guest**, **Patron**, **Volunteer**, **Classified**, **Staff** or **Admin**. If you do not wish to specify an access level at this time, click the ❌ icon.

6. Click the **Details** tab to enter details for the record.

- The **Details** tab contains a series of text fields determined by the template selected when the record was created.

- The title bar for each field contains three buttons:

  - Use the ⊙ **Open/Close** button to collapse and expand the field.

  - Use the ⓘ **Information** button displays a description of the content required by the field.

  - Use the ⊕ **Add New Entry** to add a new data entry line for the field when multiple entries are necessary.

- Initially, only the **Title** field contains information; the name of the record. Enter the appropriate information in the remaining data fields. *All fields are optional*.

7. Click the **Description** tab to enter a description for the record.

- The Description tab includes a WSIWYG editor that lets you apply a variety of formatting and styles to your text.

8. If desired, add one or more media files to the record (see *Working with Media* on page **24** for more information).

9. Save the record to the database:

- Click **Save and Close** to save the new record to the database and close the Add/Edit Record screen.

  - The Browse Collections screen displays.

- Click **Save** to save your changes to the database and continue editing the record.

- Click **Close** to close the Add/Edit Level screen *without* saving the record.
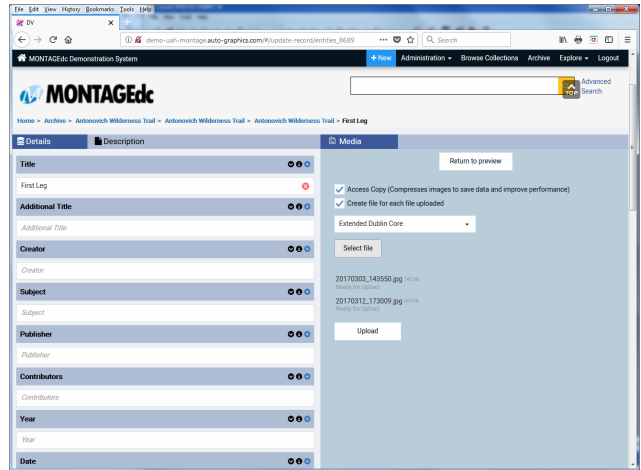
Working with Media

You can attach one or more media files to any Archive, Collection, Sub-collection or record; and attach items to any record. You can also remove media files and items (see *Deleting Items, Records and Levels* on page **27** for more information).

To add media:

1. Access the Detail Page for the desired level or the Full Display for the desired record (see *Chapter 2. SEARCHING* on page *5* for more information).

2. Click the ✏ button.

   - The Add/Edit screen for the selected level/record displays. The screen is pre-filled with current data for the level/record.

3. Click the **Add new media** button in the **Media** panel.

   - The File Upload fields display.

Media Panel - File Upload Fields

4. Set the appropriate media file options:

   - Select the **Access Copy** checkbox to compress uploaded images and improve system performance. Leave the checkbox unselected if you do not wish to compress uploaded images.

   - Select the **Create file for each file uploaded** checkbox if you wish to create an item record for each uploaded file. Leave the checkbox unselected if you do not wish to create item records for uploaded files.

   - If the **Create file for each file uploaded** checkbox is selected, choose the template to be used for the item records from the drop-down menu.

5. Click the **Select file** button.

   - A standard File Upload dialog displays.

6. Locate the desired file, then click the **Open** button on the File Upload dialog.

   You can select multiple files from the same directory for *simultaneous* upload.

   - The filename of the selected field displays, and the message "Ready for upload" is shown when the file is read for upload.

7. Click the **Upload** button to upload the files.

   - A status message displays while the upload is in progress.

   - When the files have been uploaded, the Image Viewer

8. Repeat stops **4** through **7** to upload additional files.

9. When the upload is complete, a "preview" of the first uploaded photo displays, and properties for the photo are shown including the **fileName**, system-assigned **Id** number, **Width** and **Height** of the photo (in pixels), the **mimeType**, **Extension**, and **isAccessCopy** status.

   - If multiple files are uploaded, click a thumbnail to display a preview of the image.

   - If multiple files are uploaded, click the **Set Order** button to set the display order for the files.

     ○ Select the desired display order for each image using the drop-down menus provided, then click the **Save and Close** button to save your changes.

10. Click the ⬀ **Open in new window** button to open the file in a new browser tab or window.

- When you move your cursor over the image, the "magnifying tool" displays. Click the left mouse button once to enlarge the image. Click the button again to return the image to its original size.

- Close the browser tab or window to return to the Add/Edit screen.

11. Click the ▣ **Open in viewer** button to open the currently displayed image in the Image Viewer.

- The upper left corner of the screen shows the sequence number of the currently displayed image file, and the total number of image files associated with the Full Display.

- The Image Viewer Toolbar is shown in the upper right corner of the screen.

  - Use the ⬅ and ➡ **Scroll** buttons to scroll forward and backward through the available images.

  - When you move your cursor over the image, the "magnifying tool" displays. Click the left mouse button once to enlarge the image. Click the button again to return the image to its original size. You can also use the ⊕ **Magnifying Tool** in the Toolbar to change the image magnification.

  - Use the ⬛ **Toggle Screen** button toggles the display between the "full screen" and "normal" modes.

  - Click the ✕ **Close** button to close the Image Viewer and return to the Full Display.

12. If more than one file is uploaded, use the ☑ **Set as default** checkbox to select the default image for the archive. If only one file is uploaded, the "**Set as default** checkbox for the image is selected automatically, and cannot be deselected.

13. Save your changes to the database:

- Click **Save and Close** to save the new level/record to the database and close the Add/Edit screen.
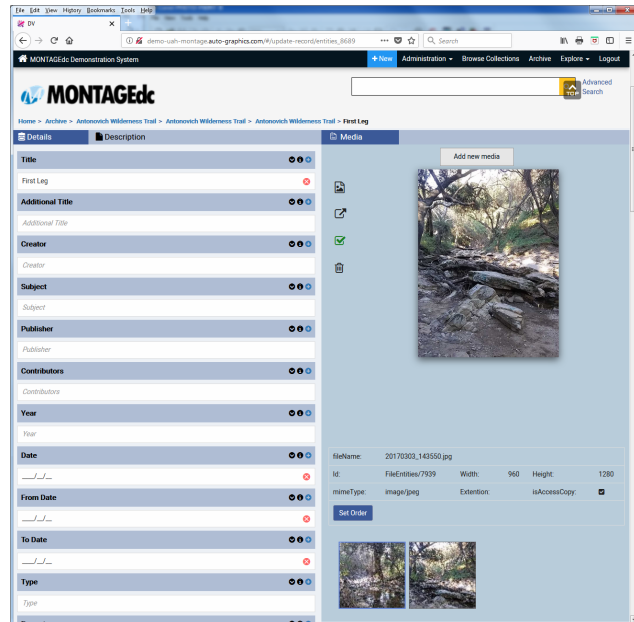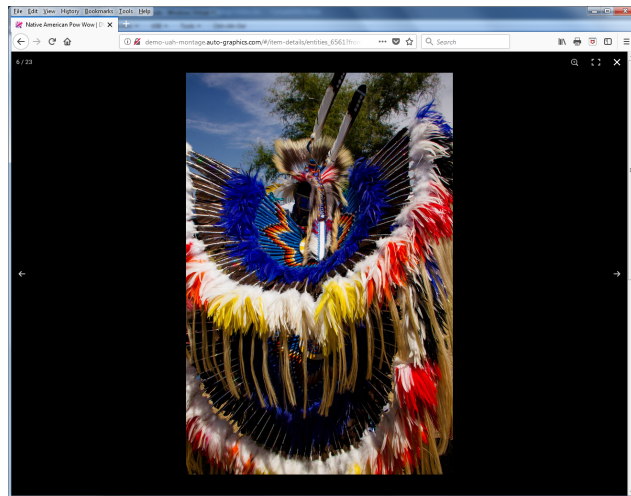

Media Panel - Preview

Image Viewer

○ The system returns to the previous Detail Page or Full Display, as appropriate.

- Click **Save** to save your changes to the database and continue editing.

- Click **Close** to close the Add/Edit screen *without* saving.

Deleting Items, Records and Levels

You can delete any item or record in the system.

To delete an item:

1. Access the Detail Page for the desired level or the Full Display for the desired record (see *Chapter 2. SEARCHING* on page **5** for more information).

2. Click the ⬤ button.

- The Add/Edit screen for the selected level/record displays. The screen is pre-filled with current data for the level/record.

3. Select the thumbnail for the item you wish to delete.

- The selected item displays in the **Media** preview area.

4. Click the 🗑 **Delete** icon in the **Media** preview area.

- The item is removed from the record.

To delete a record from the Add/Edit Record Screen:

1. Access the Detail Page for the desired level or the Full Display for the desired record (see *Chapter 2. SEARCHING* on page **5** for more information).

2. Click the ⬤ button.

- The Add/Edit screen for the selected level/record displays. The screen is pre-filled with current data for the level/record.

3. Delete all items attached to the record as described above.

4. Click the 🗑 **Delete** button at the top of the screen.

- A confirmation dialog display the message "Are you sure you want to delete?"

5. Click the **Ok** button to continue with the deletion. (Click the **Cancel** button to cancel the deletion and retain the record.)

- The system returns to the Home Page, with the record deleted from the database.

To delete a record from the Full Display:

1. Access the Full Display for the desired record (see *Chapter 2. SEARCHING* on page **5** for more information).

2. Click the 🗑 **Delete** button.

- A confirmation dialog display the message "Are you sure you want to delete?"

3. Click the **Ok** button to continue with the deletion. (Click the **Cancel** button to cancel the deletion and retain the record.)

- The system returns to the Home Page, with the record deleted from the database.

Managing Suggested Searches

Suggested Searches let you create and save pre-configured advanced searches intended to aid patrons in exploring the catalog. Suggested Searches are created, managed and saved on the Advanced Search page.

To access Suggested Searches:

1. Select **Advanced Search** from the **Explore** menu in the Navigation Bar, or, click the **Advanced Search** link next to the Quick Search text box.

   - The Advanced Search screen displays.

2. The **Suggested Searches** field shows the *first 10* currently defined searches. Click the **More…** link to display additional searches, ten at a time.

3. To locate a Suggested Search by name:

   - Enter all or part of the name in the **Enter saved query name** text box.

Advanced Search Screen

- Click the **Suggested Searches - Search** button. The list of Suggested Searches refreshes to display only those names that match your search criteria.
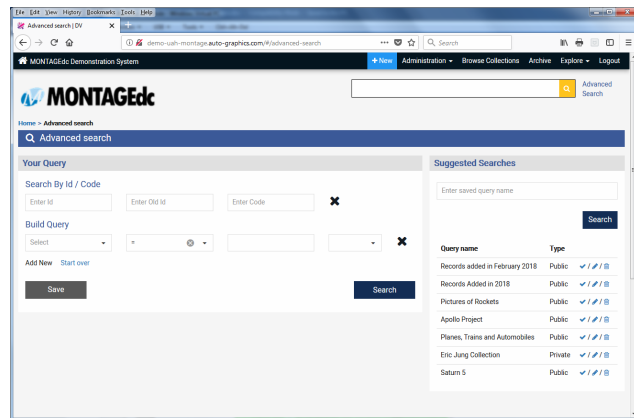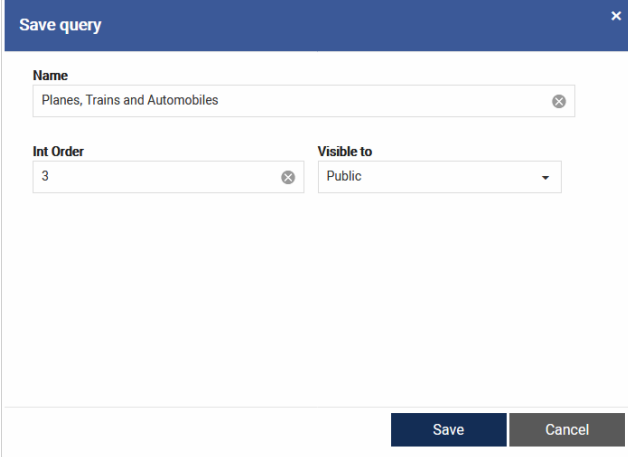
To execute a Suggested Search:

- Click the ✔ icon next to the desired Suggested Search.

  ○ The pre-defined parameters for the Suggested Search are loaded into the Advanced Search Form.

- Click the **Search** button to submit the search.

  ○ A Brief Browse List displays (see *Viewing the Brief Browse List* on page **12** for more information).

To create a Suggested Search:

1. Select **Advanced Search** from the **Explore** menu in the Navigation Bar, or, click the **Advanced Search** link next to the Quick Search text box.

   - The Advanced Search screen displays.

2. Create your search query (see *Advanced Search* on page **7** for more information).

3. Click the **Save** button.

   - The Save Query dialog displays.

4. Enter a name for the Suggested Search in the **Name** text box.

5. Enter the display sequence for the search in the **Int Order** text box.

   - The system provides a default value (**0 ~ 9**) in the **Int Order** text box based on the number of currently defined Suggested Searches.

   - You can enter any number from "**0**" to "**999999999**" as the **Int Order**.

   - You can enter a *unique* **Int Order** number for *each* search, or, you can use *the same* **Int Order** number for *multiple* searches.

Save Query Dialog

   > If *the same* **Int Order** number is used for *more than one* search, the associated searches are displayed with the most recently added (or edited) search last.

   - You can enter **Int Order** numbers in *numeric order* (1, 2, 3, etc.), or, you can *skip numbers* (10, 20, 30, etc.) to allow for insertion of added searches between existing searches without the need to re-sequence the entire list.

   - If you plan to create *more than 10* Suggested Searches, it is recommend that you use two-digit **Int Order** numbers.

6. Use the **Visible to** menu to set access rights for the Suggested Search:

   - **Public** – the Suggested Search is available to all users.

   - **Staff** – the Suggested Search is available to authenticated Staff members only.

   - **Private** – the Suggested Search is available only when accessing the system using your username and password.

7. Click the **Save** button on the Save Query dialog to save the Suggested Search. (Click the **Cancel** button to close the Save Query dialog *without* saving the Suggested Search.)

   - The Save Query dialog closes and the new search is added to the list of Suggested Searches.

To edit a Selected Search:

- Click the ✎ icon next to the desired Suggested Search.
   ○ The pre-defined parameters for the Suggested Search are loaded into the Advanced Search Form.

- Edit the search parameters as desired (see *Advanced Search* on page **7** for more information).

- Click the **Save** button.
   ○ The Save Query dialog displays.

- Edit the **Name**, **Int Order** and/or **Visible to** values as desired.

- Click the **Save** button on the Save Query dialog to save your changes to the Suggested Search. (Click the **Cancel** button to close the Save Query dialog *without* saving your changes.)
   ○ The Save Query dialog closes and the Suggested Searches field refreshes to display your changes.

To delete a Suggested Search:

- Click the 🗑 icon next to the desired Suggested Search.

  ○ A confirmation dialog displays the message "Are you sure you want to delete?"

- Click the **Ok** button to proceed with the deletion. (Click the **Cancel** button to cancel the deletion and leave the Suggested Search unchanged.)

  ○ The confirmation dialog closes, and the search is removed from the Suggested Searches list.

System Administration

Working with Banners

The Home Page lets you create and display *one or more* banners at the top of the page. Banners are generally intended to highlight collections or items from your catalog. When multiple banners are added to the Home Page, the banners scroll automatically every eight seconds. Alternately, you can manually scroll the banners using the scroll buttons ○ ○ ○ ◉ ○ ○ ○ at the bottom of the banner display area.
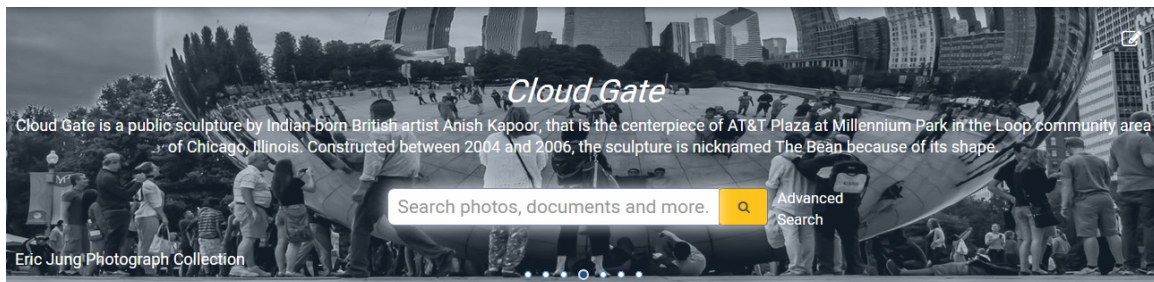
To add a new banner:

1. From the **Administration** menu, select **System Settings**.

   - The System Settings dialog displays.
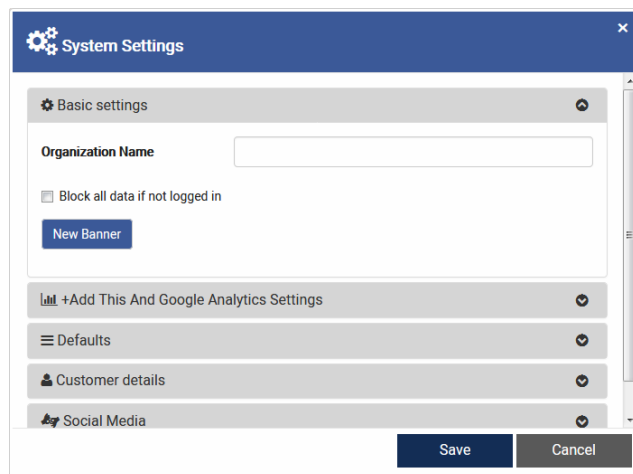
2. Click **Basic Settings** on the System Settings dialog to expand the data entry fields.

3. Click the **New Banner** button.

   - A new "blank" banner is added to the end of the string of banners.

   - The message "New banner was added successfully, for more details go to edit banner" displays.

4. Click the **Cancel** button to close the System Settings dialog.

5. Edit the banner as desired to add graphics and/or text.

System Settings Dialog – Basic Settings Fields

To edit a banner:

When editing content for a banner, click the ⊗ button for a text box to clear the contents of the box.
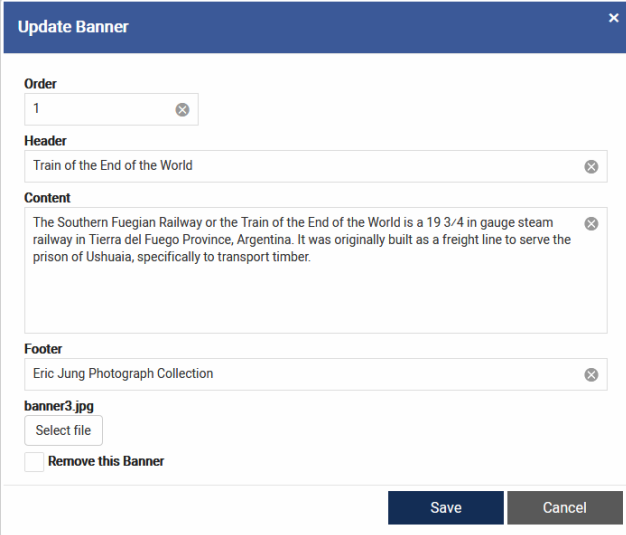
1. Use the scroll buttons ○ ○ ○ ◉ ○ ○ ○ at the bottom of the banner display area to locate the banner you wish to edit.

2. Click the 🖉 button in the upper right corner of the banner display area.

   • The Update Banner dialog displays.

3. Enter or edit the position in which you wish the banner to display in the **Order** text box.

   • You can enter any number from **0** to **999999999** as the **Order** number.

Update Banner Dialog

4. Enter text for the banner in the **Header**, **Content** and **Footer** text boxes.

5. If desired, add a photo to the banner:

If a photo was previously uploaded for the banner, the name of the photo file is displayed above the **Select file** button.

   • Click the **Select file** button.

      ○ A standard File Upload dialog displays.

   • Locate the desired file, then click the **Open** button on the File Upload dialog.

      ○ The File Upload dialog closes automatically, and the selected file is uploaded.

6. When all desired content has been entered or edited, click the **Save** button to save your changes.

   • When the changes have been saved, the Update Banner dialog closes automatically.

7. Use the scroll buttons ○ ○ ○ ◉ ○ ○ ○ at the bottom of the banner display area to locate the edited banner, and verify your changes display as desired. Repeat steps **2** through **6** if further editing is necessary.

To delete a banner:

1. Use the scroll buttons ○ ○ ○ ◉ ○ ○ ○ at the bottom of the banner display area to locate the banner you wish to delete.

2. Click the 🖉 button in the upper right corner of the banner display area.

   • The Update Banner dialog displays.

3. Select the **Remove this Banner** checkbox.

4. Click the **Save** button.

   • The Update Banner dialog closes automatically, and the selected banner is deleted from the system.
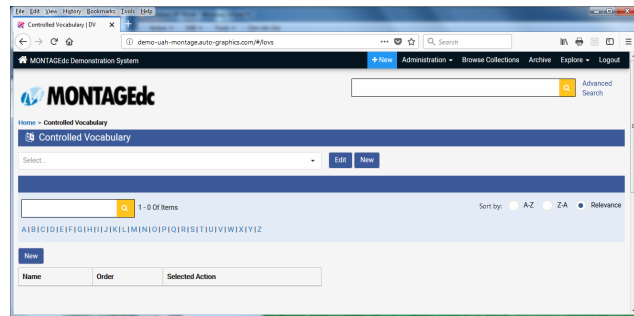
Montage Administrator's Guide

Managing Controlled Vocabulary

Controlled Vocabulary lets you define and manage approved entries for the various terms on Add/Edit screens.

To access the Controlled Vocabulary screen:

- From the **Administration** menu, select **Controlled Vocabulary**.
    - The Controlled Vocabulary screen displays.

Controlled Vocabulary Screen

To create a new term:

1. Click the **New** button at the top of the screen.

    - The Save Term dialog displays.

2. Enter a code for the term in the **Code** text box.

3. Enter a title for the term in the **Title** text box.

4. Click the **Save** button to save the term to the database. (Click the **Cancel** button to close the Save Term dialog without saving the new term.)

To edit an existing term:

1. Select the term you wish to edit from the drop-down menu at the top of the screen, then click the **Edit** button.

Save Term Dialog

    - The Save Term dialog displays. The dialog is pre-filled with the current values for the term.

2. Edit the **Code** and/or **Title** for the term, as desired.

3. Click the **Save** button to save your changes to the database. (Click the **Cancel** button to close the Save Term dialog without saving your changes.)

To view entries for a term:

- Select the term for which you wish to view entries from the drop-down menu at the top of the screen.
    - The screen refreshes to display the Entries List for the selected term.
    - The Entries List banner shows the number of currently displayed entries along with the total number of entries associated with the selected term (e.g., **1 - 50 Items Of 270 Total**).
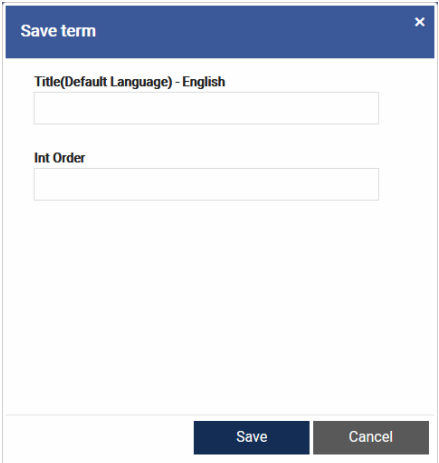

Controlled Vocabulary Entries List

- Use the scroll bar to view the entire list. When you reach the bottom of the screen, the system adds additional entries to the list automatically.

    ○ If additional entries are not added automatically, click the **Load more** button to load additional entries.

- If desired, use the **Sort by** options to re-sort the list alphabetically (**A-Z**), in reverse alphabetic order (**Z-A**), or by **Relevance** (display **Order**). **Relevance** is the *default* sort order.

- If desired, use the "alphabet" links to narrow the scope of the list:

    ○ Click an "alphabet" link to display *only* those terms that begin with the selected letter.

    ○ To return to the *full* list, click the link again.

- If desired, you can use the **Search** function to narrow the scope of the list

    ○ Enter your search term in the **Search** box (you can use a complete or partial word as your search term), then click the [q] button. The list refreshes to show only those entries that contain the search term.

    ○ Click the [x] button to clear the search box, then click the [q] button to return to the full list.

To add a *new* entry for a term:

1. Select the term for which you wish to add a *new* entry from the drop-down menu at the top of the screen.

- The screen refreshes to display the Entries List for the selected term.

2. Click the **New** button at the tip of the Entries List.

- The Save Entry dialog displays.

3. Enter a title for the entry in the **Title** text box.

4. Enter the display sequence for the entry in the **Int Order** text box.

- You can enter any number from "**0**" to "**999999999**" as the **Int Order**.

- You can enter a *unique* **Int Order** number for *each* entry, or, you can use *the same* **Int Order** number for *multiple* entries.

    If *the same* **Int Order** number is used for *more than one* entry, the associated entries are displayed with the most recently added (or edited) entry last.

- You can enter **Int Order** numbers in *numeric order* (1, 2, 3, etc.), or, you can *skip numbers* (10, 20, 30, etc.) to allow for insertion of added entries between existing entries without the need to re-sequence the entire list.

5. Click the **Save** button to save the entry to the database. (Click the **Cancel** button to close the Save Entry dialog without saving the new entry.)

To edit an *existing* entry for a term:

Only entries that are *not* currently used in *any* record can be edited.

Save Entry Dialog

1. Select the term for which you wish to edit an *existing* entry from the drop-down menu at the top of the screen.

    - The screen refreshes to display the Entries List for the selected term.

2. Click the ✏ **Edit** button for the entry you wish to edit.

    - The Save Entry dialog displays. The dialog is pre-filled with the current values for the entry.

      If the selected entry is currently used in *one or more* records, the message "This value used in (*quantity*) records. Any update is not allowed." displays. Click the **Close** button to close the message. You cannot edit this entry.

3. Edit the **Title** and/or **Int Order** for the entry, as desired.

4. Click the **Save** button to save your changes to the database. (Click the **Cancel** button to close the Save Entry dialog without saving your changes.)

To delete an *existing* entry for a term:

Only entries that are *not* currently used in *any* record can be deleted.

1. Select the term for which you wish to delete an *existing* entry from the drop-down menu at the top of the screen.

    - The screen refreshes to display the Entries List for the selected term.

2. Click the 🗑 **Delete** button for the entry you wish to delete.

    - The selected entry is removed from the list.

      If the selected entry is currently used in *one or more* records, the message "This value used in (*quantity*) records. Any update is not allowed." displays. Click the **Close** button to close the message. You cannot delete this entry.

Configuring System Settings

The **System Settings** feature lets you configure system-level defaults and maintain reference information for your Montage system.

To access System Settings:

- From the **Administration** menu, select **System Settings**.

  ○ The System Settings dialog displays.

- The System Settings dialog provides access to the following functions:

  ○ ⚙ **Basic Settings** – lets you specify the library name shown in the system header, add a "blank" banner to the Homepage (see *Working with Banners* on page **30** for more information), and specify whether a login is required to access and search the database.
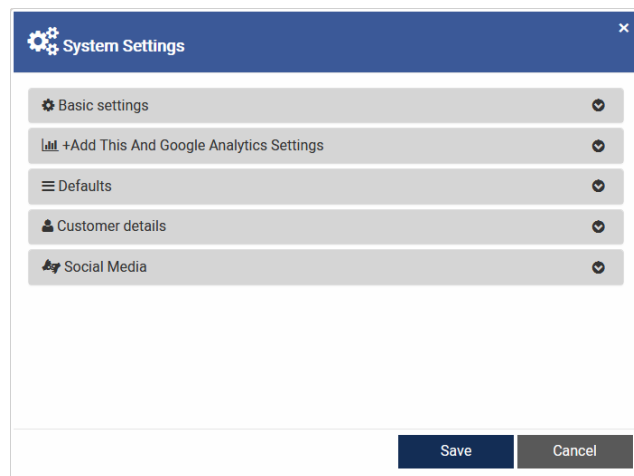
System Settings Dialog

- ○ 📊 **+Add This and Google Analytics Settings** – lets you enter the user codes for your library's AddThis and/or Google Analytics accounts.

- ○ ☰ **Defaults** – lets you specify default settings for Brief Browse Lists, assign the default status for new records, and enable or disable the accessibility plugin.

- ○ 👤 **Customer details** – lets you specify the information shown in the **Visit Us** and **Contact Info** fields in the system footer.

- ○ 📢 **Social Media** – lets you create links in the system footer to your library's social media pages (Facebook, Twitter, YouTube, LinkedIn).
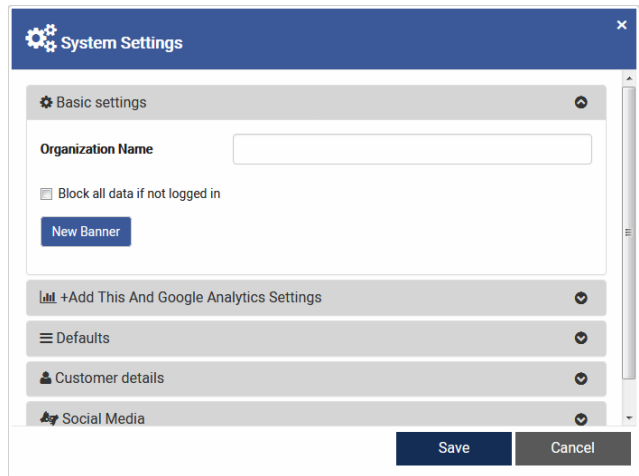
To enter System Settings:

1. Configure **Basic Settings**:

   - Click **Basic Settings** on the System Settings dialog to expand the data entry fields.

   - Enter the name of your library in the **Organization Name** text box.

     - ○ The **Organization Name** can be 50 characters maximum, including spaces.

   - If you wish data in the catalog to be available to authenticated users only, select the **Block all data if not logged in** checkbox.

     - ○ If the **Block all data if not logged in** checkbox is selected, users must provide a valid password to access the catalog.

   - If desired, click the **New Banner** button to add a new "blank" banner to your library's Home Page (see *Working with Banners* on page **30** for details).
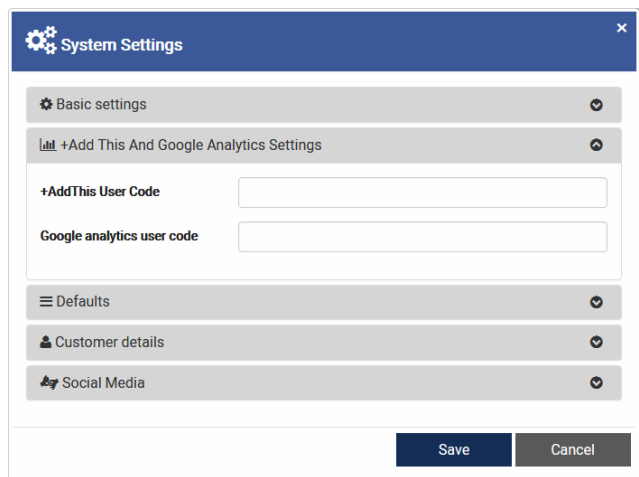
2. Configure **Add This And Google Analytics Settings**:

   - If your library subscribes to Oracle's AddThis service, enter your library's user code in the **+AddThis User Code** text box.

     - ○ When a valid user code is entered in the **+AddThis User Code** text box, Full Record Displays in the catalog include social media links, allowing users to share the content through their accounts on various social media platforms.
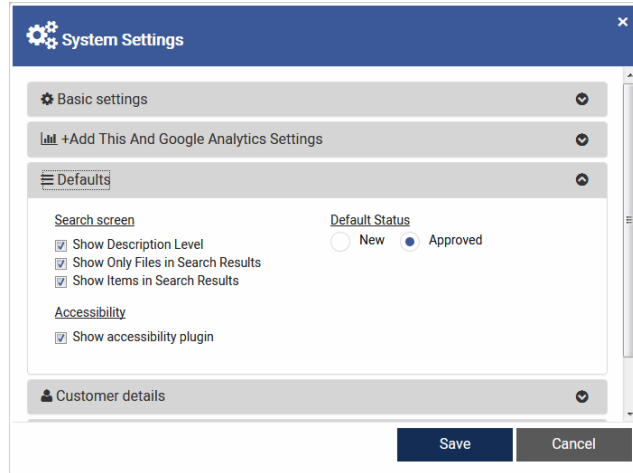
System Settings Dialog – Basic Settings Fields

System Settings Dialog – AddThis and Google Analytics Settings Fields

- If your library subscribes to Google Analytics, enter your library's user code in the **Google analytics user code** text box.
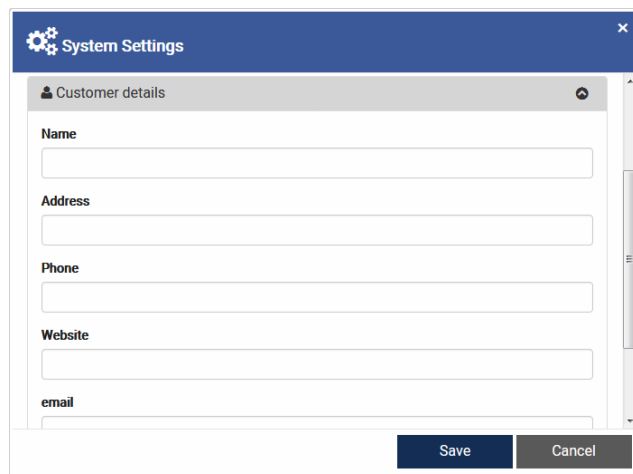
3. Configure system **Defaults**:

- Use the **Search screen** options to set default values for Brief Browse Lists as follows:

  ○ Use the **Show description level** checkbox to include the description level (**Institution**, **Collection**, **Record**, etc.) for results in Brief Browse lists when displayed in "Grid" view. When the **Show description level** checkbox is selected, the description level is shown at the top of each entry.

  ○ Use the **Show Only Files in Search Results** checkbox to limit search results to only

System Settings Dialog – Defaults Fields

those items with a description level of **Record**. When the **Show Only Files in Search Results** checkbox is selected, the **Show Files** checkbox in Brief Browse Lists is selected by default.

  ○ Use the **Show Items in Search Results** checkbox to include items in search results. When the **Show Items in Search Results** checkbox is selected, the **Show Items** checkbox in Brief Browse Lists is selected by default.

- Use the **Default Status** radio buttons to set the default status for new records added to the catalog; either **New** or **Approved**.

4. Enter **Customer details**:

- Click **Customer details** on the System Settings dialog to expand the data entry fields.

- Enter the name and address for your library in the **Name** and **Address** text boxes.

  ○ Your library's **Name** and **Address** will display in the **Visit Us** field in the system footer.

- Enter contact information for your library in the **Phone**, **Website** and **email** text boxes.
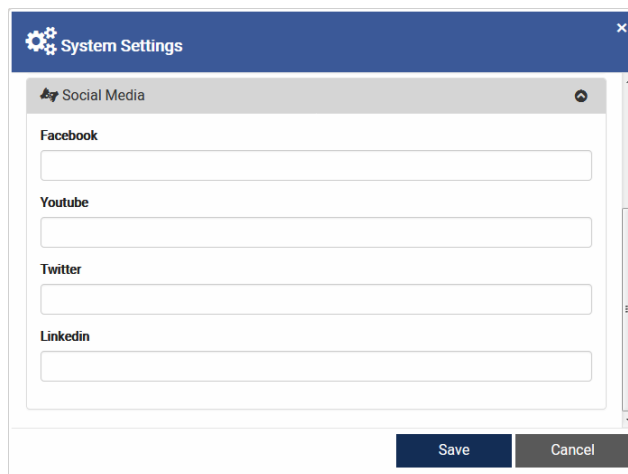
System Settings Dialog – Customer Details Fields

  ○ Your library's **Phone** number, **Website** URL and **email** address will display in the **Contact Info** field in the system footer.

- If applicable, enter the URL for your library's Terms of Use page in the **Terms of Use** text box.

○ When a **Terms of Use** URL is provided, a **Terms of Use** link is shown in the lower right corner of every screen. The Terms of Use page opens in an *additional* browser tab or window.

5. Configure **Social Media** links:

• Click **Social Media** on the System Settings dialog to expand the data entry fields.

• Enter the URLs to your library's social media pages in the **Facebook**, **Youtube**, **Twitter** and **Linkedin** text boxes.

○ Icons for each of your library's social media pages will display below the **Contact Info** field in the system footer.

System Settings Dialog – Social Media Fields

6. When all desired information has been entered or edited, click the **Save** button to save your changes.

• The System Settings dialog closes, and the screen refreshes to display your changes.

Working with Lists

Montage provides a feature that lets you save selected records to online lists. Once you've created a list, you can email the list to yourself or to someone else, or you can save the list for recall at a later date, or for use in a Featured Items showcase. If you choose not to save your list, it stays active until you leave Montage or until you manually delete it.
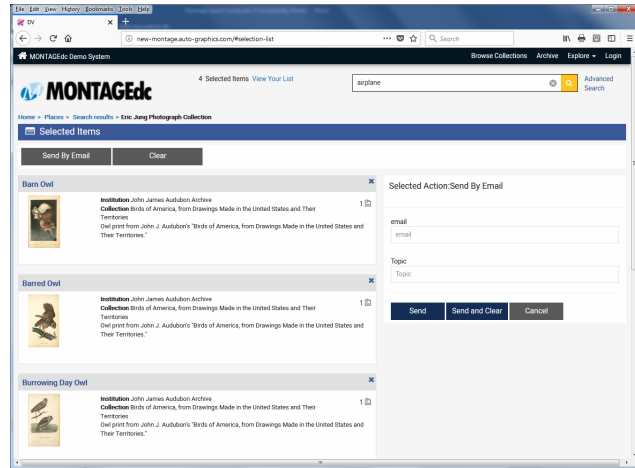
To create a list:

1. Search, browse or explore the database to access a Brief Browse List containing the records you wish to add to a list.

2. Select the 🚩 "flag" icon for each record you wish to add to the list.

• A 🚩 "hollow" flag means the record is not selected. A 🚩 "solid" flag means the record is selected. Clicking a flag repeatedly will toggle it on and off.

• A status message displays at the top of the page showing how many records are in the list.

3. Perform additional searches, as necessary, until all desired records have been added to the list.

4. Click the **View Your List** link.
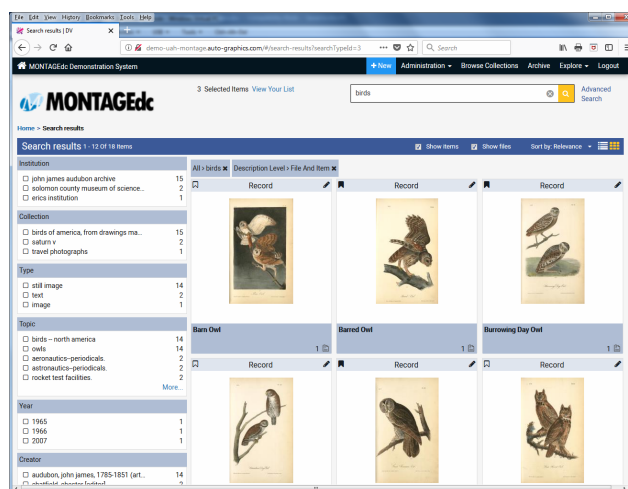
Brief Browse List

- The Selected Items screen displays. The screen lets you view the contents of your list.

- The left column of the screen shows the records in the list. Each entry shows the title of the record, the Institution and Collection where the record is located, a description, and a thumbnail of the item attached to the record.

5. If desired, remove any unwanted records from the list before saving or emailing.

    - To remove a *single record* from the list, click the ✖ icon in the title banner of the record.

    - To remove *all records* from the list, click the **Clear** button.

    The **Clear** button should be used only after you've saved or emailed the records, or if you decide you don't want to save or email the records.

Selected Items Screen

To email the list:

1. Click the **Send by Email** button.

    - The right panel of the screen refreshes to display the **Send by Email** fields.

2. Enter the email address to which you wish to send the list in the **email** text box.

3. Enter a subject line for the email in the **Topic** text box.

4. Click the **Send** button to send the list and retain the current **email** and **Topic** values. or, click the **Send and Clear** button to send the list and clear the contents of the form.

Send By Email Fields

- Each entry in the email includes the title and description for the associated record, along with a permalink to the record location within Montage.

To save the list

1. Click the **Add to List** button.

    - The right panel of the screen refreshes to display the **Add To List** fields.

2. To add the records to an *existing* list:

    - Select the desired list from the drop-down menu.

    - Click the **Add to List** button to add the records to the selected list, or, click the **Add and Clear** button to add the records to the selected list *and*

Add To List Fields

clear the records from the Selected Items screen.

3. To add the records to a *new* list:

- Click the **Create New List** link.

  ○ The Create New List dialog displays.

- Enter a **Name** and **Description** for the list.

- Use the **Visible to** menu to determine the user type to whom the list will be visible; **Public**, **Staff** or **Private**.

The **Customize Home Page** section is used to configure the list for use in a Featured Items showcase (see *Managing Featured Items Showcases* on page **44** for more information).

- Click the **Save** button to save the new list and close the Create New List dialog.

Create New List Dialog

- Select the new list from the drop-down menu.

- Click the **Add to List** button to add the records to the selected list, or, click the **Add and Clear** button to add the records to the selected list *and* clear the records from the Selected Items screen.

**To clear the Selected Items screen:**

- Click the **Clear** button.

  ○ All records are removed from the Selected Items list, and the system returns to the most recent Brief Browse List.

Managing Synonyms

The **Manage Synonyms** feature lets you create lists of synonyms for a given "parent" term. For example, the parent term "aircraft" might include "plane," for the "parent" term or any of its defined synony parent term or *any* of its synonyms.

To manage synonyms:

- Select **Manage Synonyms** from the **Admini**

  ○ The Manage Synonyms screen displays. defined synonyms for each term.

- The header shows the number of currently d associated in the list (e.g., 1 - 12 of 12 Items
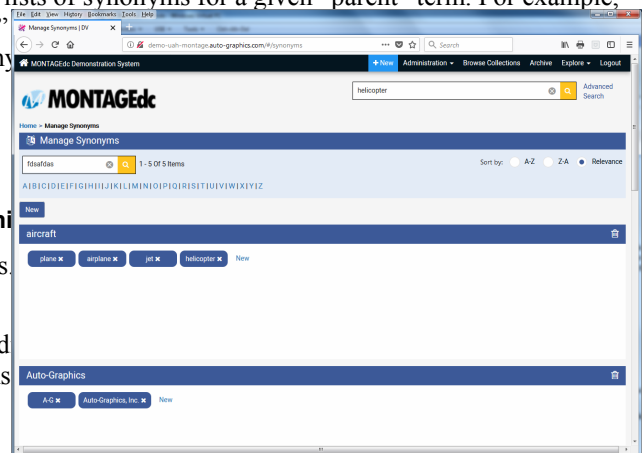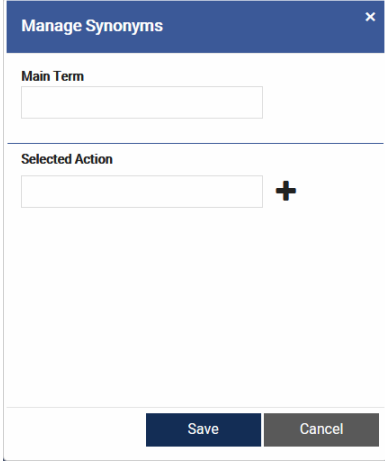

Manage Synonyms Screen

○ Use the scroll bar to view the entire list. When you reach the bottom of the screen, the system adds additional items to the list *automatically*, if available.

○ If desired, use the **Sort by** options to re-sort the list alphabetically (**A-Z**), in reverse alphabetic order (**Z-A**), or by **Relevance** (alphabetically). **Relevance** is the *default* sort order.

• If desired, use the "alphabet" links to narrow the scope of the list:

○ Click an "alphabet" link to display *only* those "parent" terms that begin with the selected letter.

○ To return to the *full* list, click the link again.

• If desired, use the "search" function to narrow the scope of the list to only those entries that contain a specified term.

○ Enter your search term in the search box in the banner (you can use a complete or partial word as your search term), then click the 🔍 button.

○ The list refreshes to show only those "parent" terms that contain the search term.

○ Click the ⊗ button to clear the search box, then click the 🔍 button to return to the full list.

• From the Manage Synonyms screen, you can:

○ Add a *new* "parent" term and related synonyms

○ Add new synonyms to an *existing* "parent" term

○ Delete synonyms for an *existing* "parent" term

○ Delete an *existing* "parent" term

To add a *new* "parent" term:

1. On the Manage Synonyms screen, click the New button.

• The Add Term dialog displays.

2. Enter the "parent" term in the **Main Term** text box.

3. Enter the first synonym for the "parent" term in the **Selected Action** text box.

• Click the ➕ icon as needed to add *additional* synonyms to the "parent" term.

4. When all desired synonyms have been entered, click the **Save** button to save your changes.

• The Add Term dialog closes, and the Manage Synonyms screen refreshes to display your changes.

Add Term Dialog

To add a synonym to an *existing* term:

1. Locate the term to which you wish to add a synonym.

2. Click the **New** link to display the "Add Synonym" fields.

3. Enter the desired synonym in the text box.

4. Click the 💾 **Save** button to add the synonym to the associated "parent" term. (Click the ✖ **Cancel** button to cancel the addition.)

• The "Add Synonym" fields close, and the screen refreshes to display your changes.

To delete a synonym from an *existing* term:

1. Locate the term from which you wish to delete a synonym.

2. Click the ⊠ icon for the synonym you wish to delete.

    *   The synonym is removed from the list.

To delete an *existing* "parent" term:

1. Locate the "parent" term you wish to delete.

2. Click the 🗑 icon for the term.

    *   A confirmation dialog displays the message "Delete entire list will delete entire list records, are you sure you want to delete?"

3. Click the **OK** button to continue with the deletion. (Click the **Cancel** button to cancel the deletion.)

    *   The confirmation dialog closes, and the screen refreshes with the selected "parent" term removed from the list.

Viewing Statistics

The **Statistics** function provides you with database and usage statistics for your Montage system.

To access Statistics:

*   From the **Administration** menu, select **Statistics**.
    *   The Statistics screen displays.
    *   The Statistics screen is divided into two sections; **Current Statistics** and **Statistics by Date**.

To view Current Statistics:

The **Current Statistics** section provides general statistics for your Montage system.

*   **Collections** – shows the **Total** number of collections in the database, along with a pie chart and accompanying list that provides a breakdown of collections by level (**Institution**, **Collections**, **Subcollection**, etc.).
    *   Click a level in the list to "hide" the associated level in the pie chart. Click a "hidden" level to "show" the associated level in the pie chart.

*   **Records** – shows the **Total** number of records in the database, along with a pie chart and accompanying list that provides a breakdown of records by type (**Item** or **Record**).
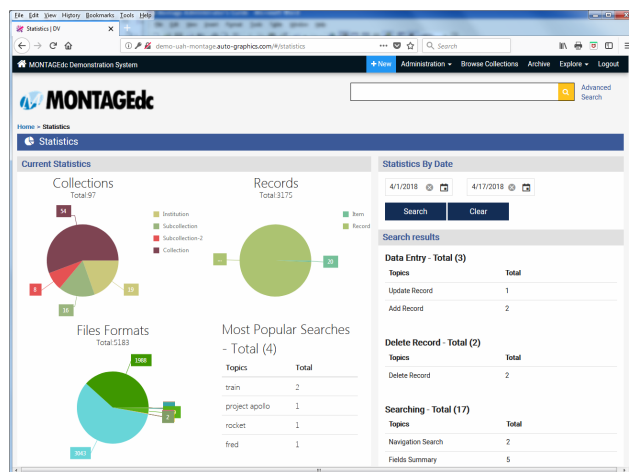
Statistics Screen

○ Click a record type in the list to "hide" the associated record type in the pie chart. Click a "hidden" record type to "show" the associated record type in the pie chart.

• **Files Formats** – shows the **Total** number of files in the database, along with a pie chart that provides a breakdown of file types by format.

• **Most Popular Searches** – shows the five most popular searches of your Montage system, along with the **Topics** and **Total** number of searches for each topic.

To view Statistics by Date:

The **Statistics by Date** section provides usage statistics for your Montage system for a specified date range.

• Use the **From** and **To** text boxes to specify the starting and ending dates for the report period.

○ If desired, click the 📅 icon to enter **From** and **To** dates using the Date Entry Calendar (see *Using the Date Entry Calendar* on page **42** for more information).

○ Click the **Search** button to retrieve statistics for the specified report period.

• The **Search results** section shows usage statistics for your Montage system for the specified report period.

○ **Delete Record** – shows the **Total** number of records deleted during the report period, along with separate totals for deletion type (**Delete Record**).

○ **Searching** – shows the **Total** number of all searches performed during the report period by all user types, along with separate totals for each search type (**Navigation Search**, **Fields Summary**, **Advanced search**, **Key Word Search**).

○ **Media** – shows the **Total** number of all media transactions (additions and deletions) performed during the report period, along with separate totals for each transaction type (**Delete Media**, **Media Upload**).

○ **Data Entry** – shows the **Total** number of all data entry transactions performed during the report period, along with separate totals for each transaction type (**Add Record**, **Update Record**).

○ **Access Activity** – shows the **Total** number of times the system was accessed during the report period by all user types, along with separate totals for each user type (**Guest Access**, **Staff Login**).

Using the Date Entry Calendar

Statistics by Date functionality (see *Viewing Statistics* on page **41** for more information) requires you to specify **From** and **To** dates for the report period. If you wish, you may use the Date Entry Calendar to select the report period **From** and **To** dates.

**To select a date from the Date Entry Calendar:**

1. Click the 📅 icon in the date entry text box.

• The Date Entry Calendar displays. The calendar shows the current day, month and calendar year.

2. To scroll the calendar month-by-month:

• Use the ‹ and › buttons to scroll backwards and forwards one month at a time. Click a date to select the desired day for the currently displayed month.
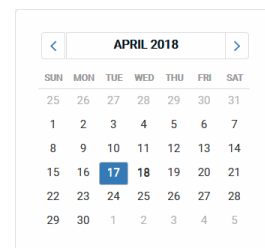
○ The Date Entry Calendar closes, and the selected date is automatically entered in the associated text box.

3. To scroll the calendar year-by-year:

- Click the year in the calendar header.

  ○ The calendar refreshes to display a calendar of months for the current year.

- Use the ‹ and › buttons to scroll backwards and forwards one year at a time.

- Click a month to select the desired month for the currently displayed year.

  ○ The calendar for the selected month displays.

- Click a date to select the desired day for the currently displayed month.

  ○ The Date Entry Calendar closes, and the selected date is automatically entered in the associated text box.
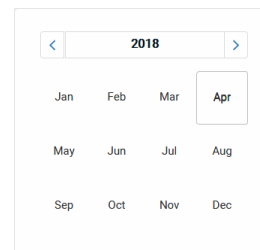
4. To scroll the calendar in 12-year increments:

- Click the year in the calendar header.

  ○ The calendar refreshes to display a calendar of months for the current year.

- Click the year in the calendar header.

  ○ The calendar refreshes to display a grid of 12 years, beginning with the current calendar year.

- Use the ‹ and › buttons to scroll backwards and forwards in 12-year increments.

- Click a year to select the desired year for the currently displayed 12-year range.

  ○ The calendar refreshes to display a calendar of months for the selected year.

- Click a month to select the desired month for the currently displayed year.

  ○ The calendar for the selected month displays.

- Click a date to select the desired day for the currently displayed month.

  ○ The Date Entry Calendar closes, and the selected date is automatically entered in the associated text box.
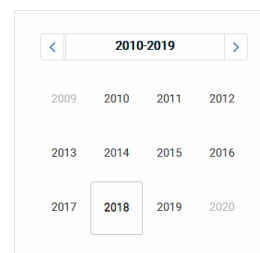
Managing Showcases

The Home Page includes a Featured Collections showcase, and (optionally) one or more Featured Items showcases. The Featured Collections showcase can be configured to display up to eight Archives or Collections of special interest to your library's patrons. Featured Items showcases are populated using saved lists of records. Featured Items showcases, and their labels, are initially configured for your Montage system by Auto-Graphics. They cannot be added or deleted locally. The content of the showcases, however, is completely under local control.
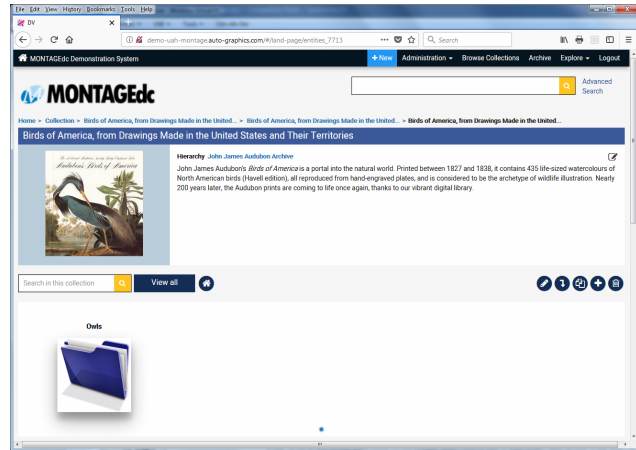
Managing the Featured Collections Showcase

To add an Archive or Collection to the Featured Collections showcase:

1. Search, browse or explore the database to access the Detail Page for the desired Archive or Collection.

2. Click the 🏠 **Add to Home** button to display the **Add to Home** fields.

3. Enter a display sequence number to specify the order in which the Collection should be displayed.

    Collection Detail Page

    -   The system provides a default sequence number of "**1**."

    -   You can enter any number from "**0**" to "**999999999**" as the sequence number.

    -   You can enter a *unique* sequence number for *each* Collection, or, you can use *the same* sequence number for *multiple* Collections.

    > If *the same* sequence number is used for *more than one* Collection, the associated Collections are displayed with the most recently added (or edited) Collection last.

    -   You can enter sequence numbers in *numeric order* (1, 2, 3, etc.), or, you can *skip numbers* (10, 20, 30, etc.) to allow for insertion of added Collections between existing Collections without the need to re-sequence the entire showcase.

4. Click the 💾 **Save** button to add the collection to the Featured Collections showcase. (Click the ✖ **Cancel** button to cancel the addition.)

    -   The **Add to Home** fields close, and the 🏠 **Add to Home** button changes to a 🚫 **Remove from Home Page** button, indicating that the Collection has been successfully added to the Featured Collections showcase.

To remove an Archive or Collection from the Featured Collections showcase:

1. Access the Detail Page for the Archive or Collection you wish to remove from the Featured Collections showcase.

2. Click the 🚫 **Remove from Home Page** button.

    -   The 🏠 Add to Home button displays, and the Collection is removed from the Featured Collections showcase.

Managing Featured Items Showcases

Featured Items showcases are populated using saved lists of records.

To add a List to a Featured Items showcase:

1. If necessary, create a list of records you wish to add to a Featured Items showcase (see ***Working with Lists*** on page **37** for more information).

2. Select **My Lists** from the **Administration** menu.

- The My Lists screen displays.

3. Locate the desired list in the left panel of the screen, then and click the ✏ **Edit** icon.

- The **Edit list** dialog displays.

4. If desired, edit the list **Name**, **Description** and **Visible to** setting.

5. Click **Customize Home Page** to expand the **Customize Home Page** options.

6. Select the **Show in Home Page** checkbox to enable the list for display in a Featured Items showcase.

- The **Customize Home Page** fields display.

7. Select the showcase to which the list will be added from the **Home Page Section** menu.

8. The **Home Page Section** menu lists *all* Featured Items showcases defined for your Montage system.

9. Enter a display sequence number in the **Order** text box to specify the order in which the List should be displayed.
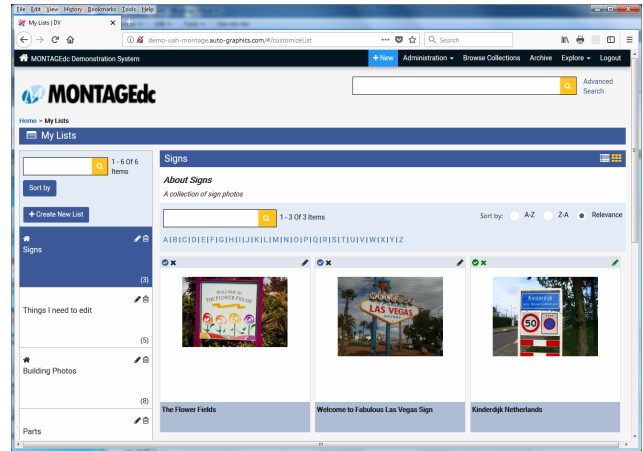
- The system provides a default **Order** number of "**1**."

- You can enter any number from "**0**" to "**999999999**" as the sequence number.

My Lists Screen

Edit List Dialog

- You can enter a *unique* **Order** number for *each* list, or, you can use *the same* **Order** number for *multiple* lists.

  If *the same* **Order** number is used for *more than one* list, the associated lists are displayed with the most recently added (or edited) list last.
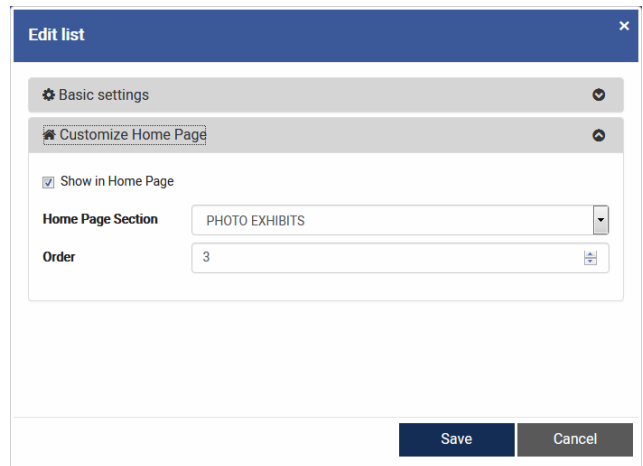
- You can enter **Order** numbers in *numeric order* (1, 2, 3, etc.), or, you can *skip numbers* (10, 20, 30, etc.) to allow for insertion of added lists between existing lists without the need to re-sequence the entire showcase.

10. Click the **Save** button to add the list to the selected showcase. (Click the **Cancel** button to cancel the addition and leave the showcase unchanged.)

- The **Edit list** dialog closes, and a 🏠 **Home** icon is added in the upper left corner of the list entry to indicate the list is included in a Featured Items showcase on the Home Page.

To remove a List from a Featured Items showcase:

1. Select **My Lists** from the **Administration** menu.

   - The My Lists screen displays.

2. Locate the desired list in the left panel of the screen, then and click the ✏ **Edit** icon.

   - The **Edit list** dialog displays.

3. Unselect the **Show in Home Page** checkbox, then click the **Save** button.

   - The **Edit list** dialog closes, and the 🏠 **Home** icon is removed from the list entry to indicate the list is no longer included in a Featured Items showcase on the Home Page.

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