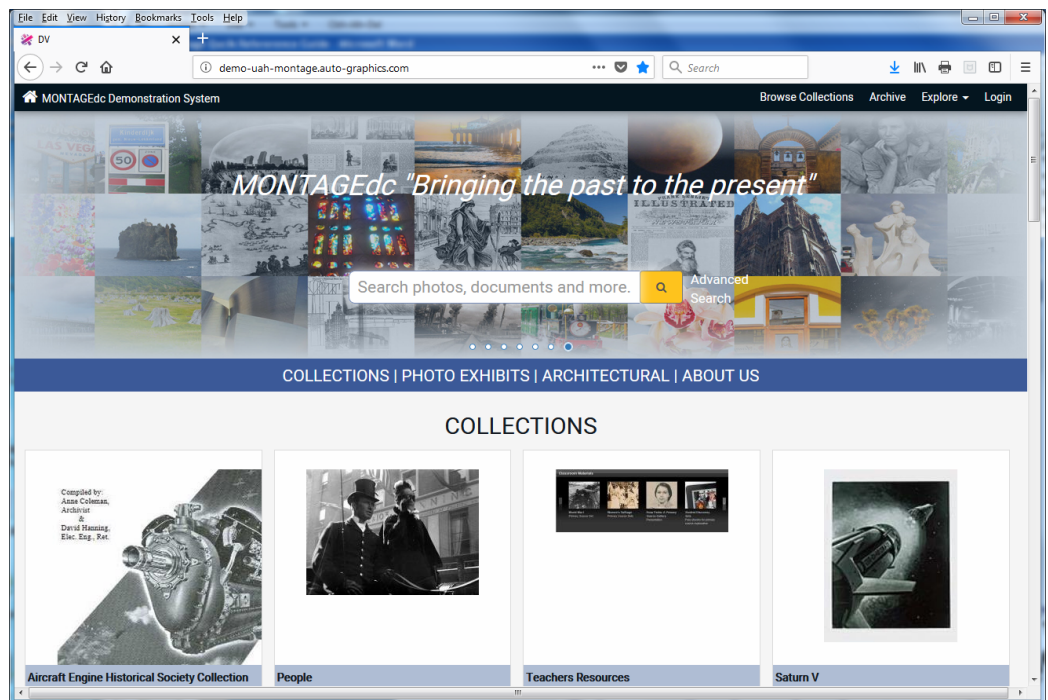
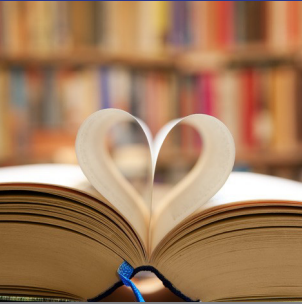


# M MONTAGEdc®



# User Guide

# MONTAGEdc

## Version 2.1.2

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# ***Montage Search Guide***

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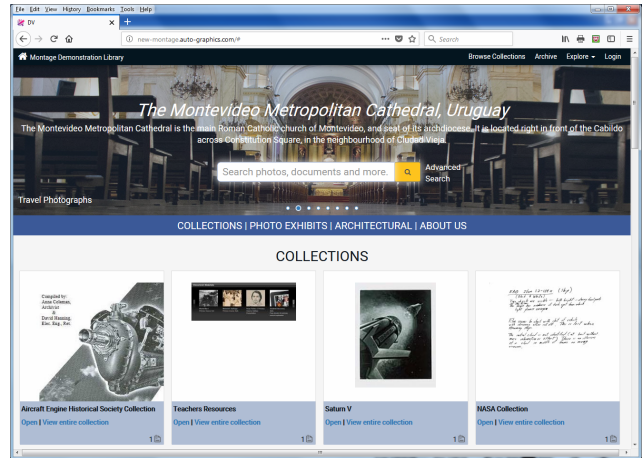
## THE HOME PAGE

### Overview

Montage Digital Collections provides four search options: Browsing, Exploring, Quick Search and Advanced Search.

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.

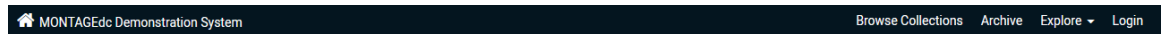
The Home Page includes a Navigation Bar, a scrolling Banner with a “Quick Search” field, “Featured Collections” and “Featured Items” showcases, and reference information for your library.



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.
- **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 7 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 7 for more information).
- **Explore** – The **Explore** menu lets you browse the Montage database according to a selected pre-defined heading (see [Exploring](#) on page 7 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.

# Montage Search Guide

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- **Advanced Search** – You can also access the **Advanced search** screen from the **Explore** menu (see [Advanced Search](#) on page 9 for more information).
- **Login / Logout** – The **Login** link displays the Login screen, which supports authenticated access to the system (authenticated access is available to library staff *only*).

## 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, you can use the scroll buttons to scroll the Banner manually.

## Quick Search

A “Quick Search” text box is provided in the Banner. “Quick Search” lets you perform a full text search of all content in the system (see [Quick Search](#) on page 8 for more information), and includes an **Advanced Search** link that provides access to the Advanced Search screen (see [Advanced Search](#) on page 9 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 contains up to eight Archives or Collections of special interest.

### 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 compiled by your library.

## About Us

In most cases, the **About Us** section of the Home Page includes general information about your library or your library’s digital collections. This section may include graphics and links as well.

## Contact Information

The “footer” shown at the bottom of every screen provides information to help you contact your library.

The **Visit Us** field shows your library’s name and address, and may include links to your library’s “social media” pages on Facebook, Twitter, YouTube and LinkedIn. Click an icon to open the associated “social media” page for your library. The selected page opens in a new browser tab or window.

The **Contact Info** field may include your library’s phone number, email address and website URL. Click the email address to open the default email client for your computer. Click the website URL to open your library’s website in a new browser tab or window.

# Montage Search Guide

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The **Contact Us** field lets you send questions, comments or suggestions to your library staff.

1. Enter your **Name** and **email** address, add a **Topic** line, then enter the content of your message.
  - The **Topic** line is required; all other fields are optional.
  - If you don't need a reply from the library, you can leave the **Name** and **email** fields blank.
2. Once you've entered the necessary information, click the **Send** button to send your message.
  - If you omit a required field, an error message shows briefly at the bottom of the screen. Enter the required information, then click the **Send** button again.
  - If your message is sent successfully, a confirmation message shows briefly at the bottom of the screen.

# ***Montage Search Guide***

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## SEARCHING

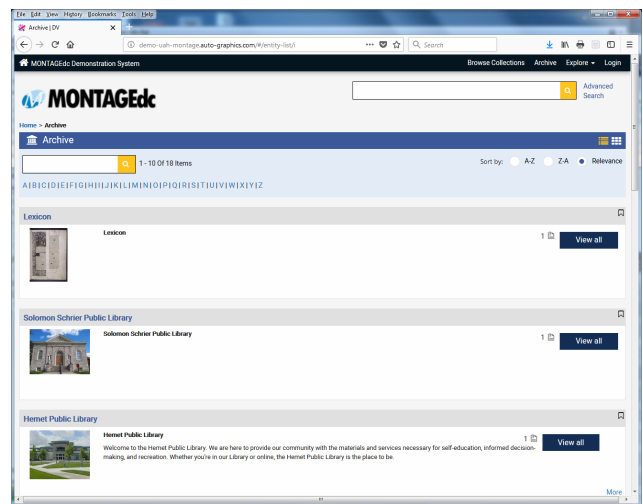
Montage Digital Collections provides three search options: Browsing and Exploring, Quick Search and Advanced Search.

### 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, mouse over the **Load more** button to load additional archives.

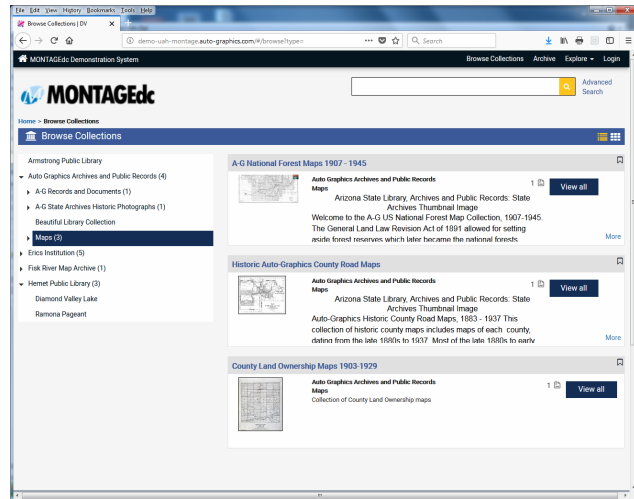
- If desired, use the “alphabet” links to narrow the scope of the list:
  - Click an “alphabet” link to display *only* those Archives that contain a word that begins with the selected letter.
  - To return to the *full* list, click the link again.
- If desired, use the “search” function to narrow the 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 11 for more information).

# Montage Search Guide

- Click the **View All** button for an archive to display a Brief Browse List of collections for the archive (see [Viewing the Brief Browse List](#) on page 13 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.



**Browse Collections Screen**

- Select an entry in the list to view a Browse List for the selected level.
- 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 13 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 12 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 11 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.



The image shows a search interface with a white text input box on the left and a yellow search button with a magnifying glass icon on the right. To the right of the search button is a blue link labeled "Advanced Search".

### To perform a Quick Search:

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

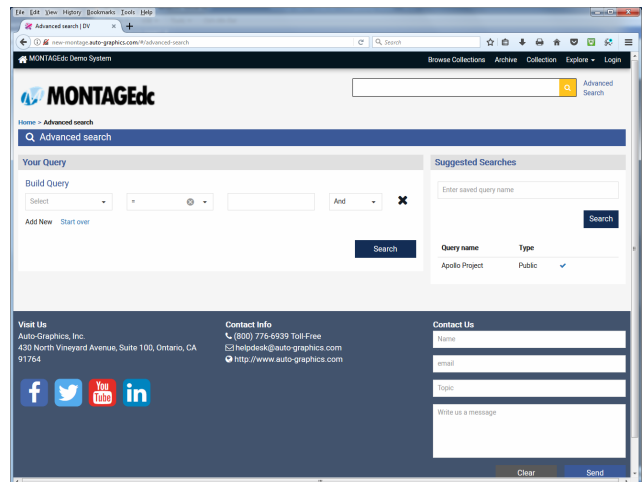
- Enter your search term in the Quick Search text box (you can use a complete or partial word as your search term).
- Enter your search term in the Quick Search text box. You can use a complete or partial word as your search term.
  - You can also use the wildcard character “?” in your search term.
- Click the  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 13 for more information).

## Advanced Search

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

### 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.



**Advanced Search Screen**

# Montage Search Guide

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- **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**.
    - A “blank” row displays for entry of the “second term” of your search query.
- 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 **13** for more information).

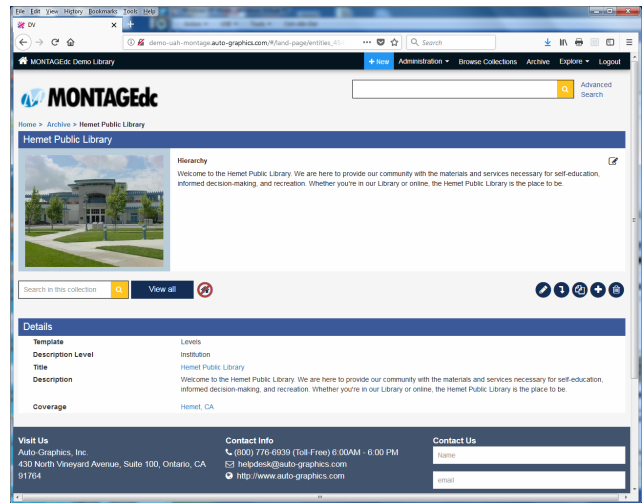


## VIEWING SEARCH RESULTS

### Viewing the Archive Detail Page

The Archive Detail Page is displayed when you select a “thumbnail” on an Archive List (see [Browsing on page 7](#) 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 a link in the **Details** section to perform a “follow on” search using the selected term or value.
- Click the **View all** button to open a Brief Browse List of collections and records associated with the archive (see [Viewing the Brief Browse List on page 13](#) for more information), or you can use the “search” function to narrow the scope of the list.
  - 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 records that contain your search term (see [Viewing the Brief Browse List on page 13](#) for more information).



Archive Detail Page

### 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

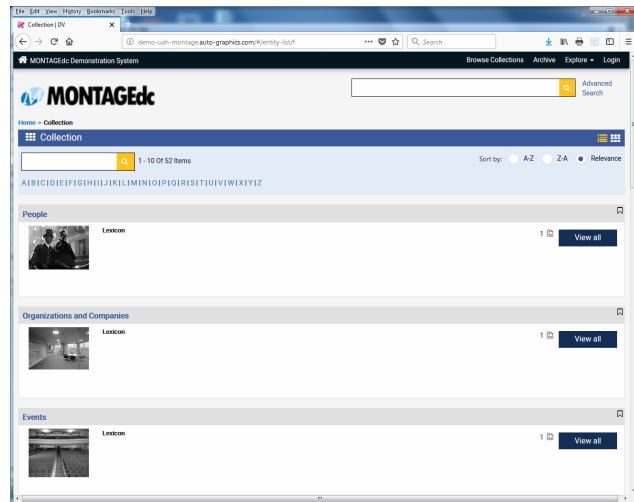
The Collections List is shown when you select **Collection** from the **Explore** menu in the Navigation Bar.

- 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.

# Montage Search Guide

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 13 for more information).
- Click a title in the list to view the Collection Detail Page for the associated collection (see *Using the Collection Detail Page* on page 12 for more information).
- Click the **View all** button for a collection to view a list of records and items associated with the collection (see *Viewing the Brief Browse List* on page 13 for more information).

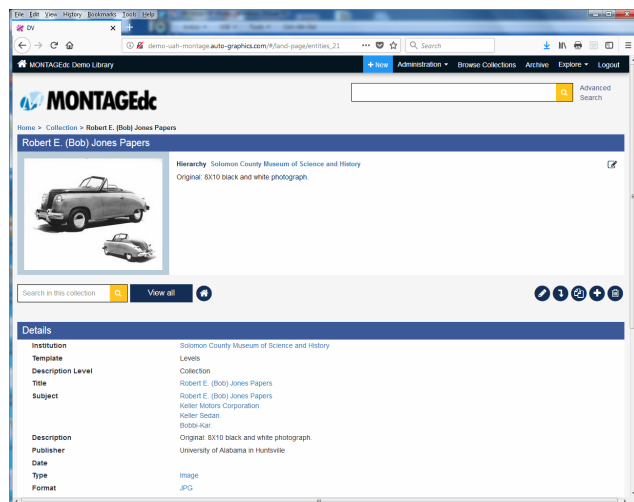


**Collections List**

## Using the Collection Detail Page

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

- The Collection 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.
  - Click a link in the **Details** section to perform a “follow on” search using the selected term or value.
- If desired, you can use the **Search** function to narrow the scope of the list (see *Narrowing Results* on page 13 for more information).
- Click the **View all** button to view a Brief Browse List of records and items included in the collection (see *Viewing the Brief Browse List* on page 13 for more information).



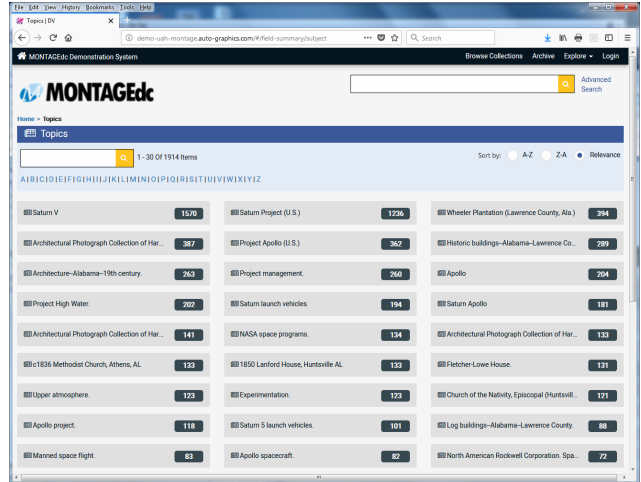
**Collection Detail Page**

- Click an item in the showcase to view the Full Display for the item (see [Viewing the Full Display](#) on page 15 for more information).

## Using the Term List

A Term List is shown when you select a heading from the **Explore** menu.

- The Term List banner shows the selected heading.
- The Term List header shows the number of currently displayed terms along with the total number of terms associated with the selected heading (e.g., **1 - 50 Of 270 Items**).
- 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.
  - 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.
  - If desired, use the **Sort By** options to re-sort the list alphabetically (**A-Z**), in reverse alphabetic order (**Z-A**), or by **Relevance** (greatest to least number of items). **Relevance** is the *default* sort order.
  - In the case of long (truncated) titles, position the cursor over a title to view the complete title.
- 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* Term List, click the link again.
- If desired, use the “search” function to narrow the scope of the list (see [Narrowing Results](#) on page 13 for more information).
- Click a term to view a list of archives, collections, records and items associated with the term (see [Viewing the Brief Browse List](#) on page 13 for more information).






Term List

## Narrowing Results

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




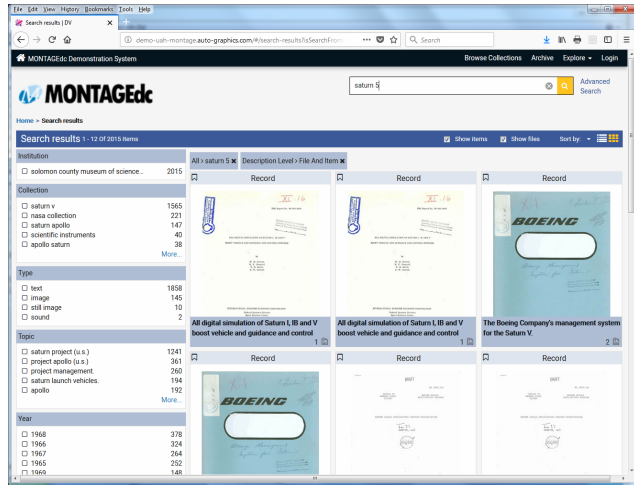
# Montage Search Guide

- 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.

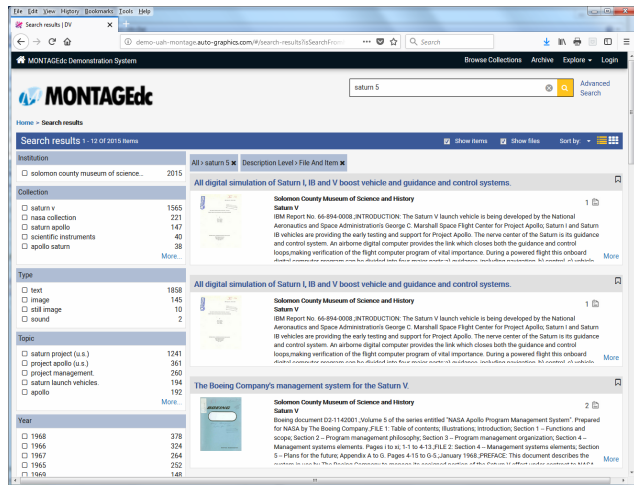
## Viewing the Brief Browse List

A Brief Browse List is shown following a Quick Search (see [Quick Search](#) on page 8 for more information) or Advanced Search (see [Advanced Search](#) on page 9 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 11 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 “filter” string 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)**.
- 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.



Brief Browse List – “Grid” Format



Brief Browse List – “List” Format

# Montage Search Guide

- 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 15 for more information).
- Click a title to view the Full Display for the associated item (see [Viewing the Full Display](#) on page 15 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. Multiple facets can be applied 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.

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

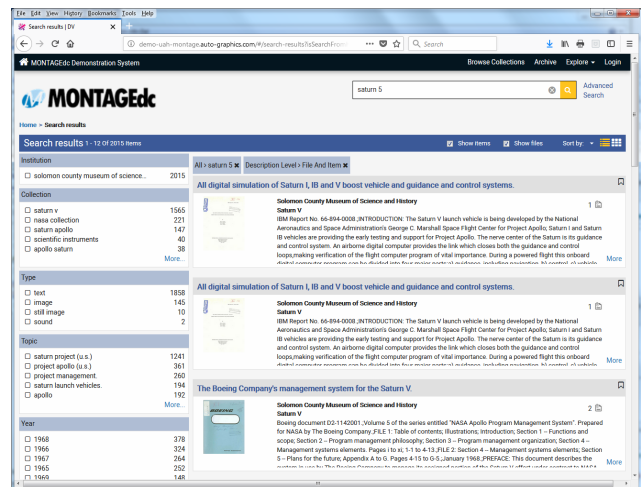
A logical OR is applied to filters *within* a category. A logical AND is applied to filters *between* categories.

- The Brief Browse List refreshes to show only those entries 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 ✕ 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 is a multi-pane display that provides complete information about the selected record.

- 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.



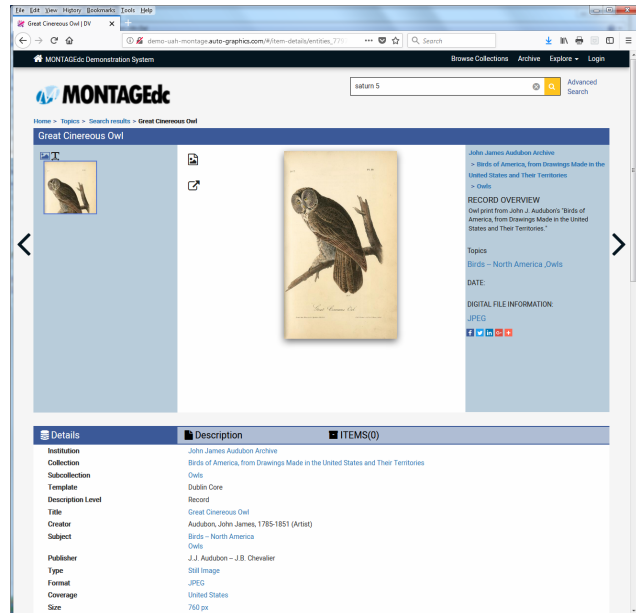
**Limit Your Results Panel**

# Montage Search Guide

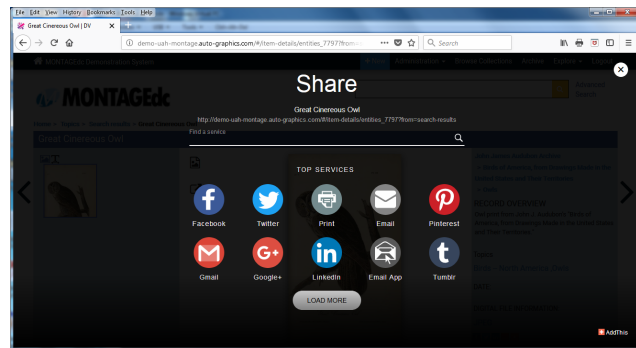
- Click the **T Transcript** button in the left panel to view a transcript for the currently selected file, if available. Click the **Thumbnails** button to return to the thumbnails display.
- The right panel shows the archive and collection in which the record resides, and includes a **RECORD OVERVIEW** 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**, **T 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.
- 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.





Full Display



Available Platforms

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.
- The **Items** tab lets you view items associated with the record.
  - 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 13](#) for more information).
  - The remainder of the **Items** tab is similar to the left and center panels of the Full Display, as described above.

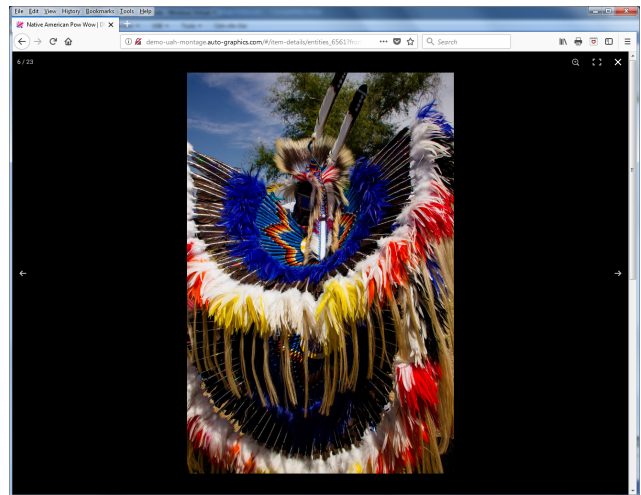


# Montage Search Guide

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

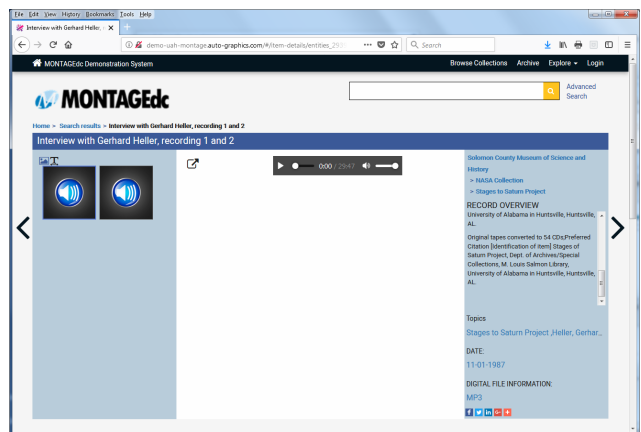


*Image Viewer*

## 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.
- Use the  Speaker button to mute or un-mute the speakers. Use the “volume slider” to set the playback volume to the desired level.







*Audio Player*

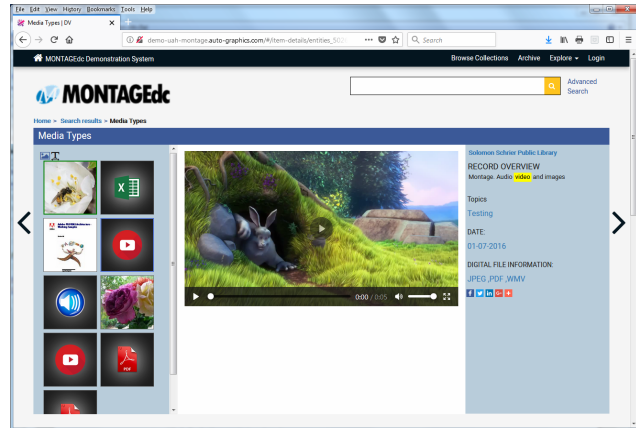
# Montage Search Guide

- 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 un-mute 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.

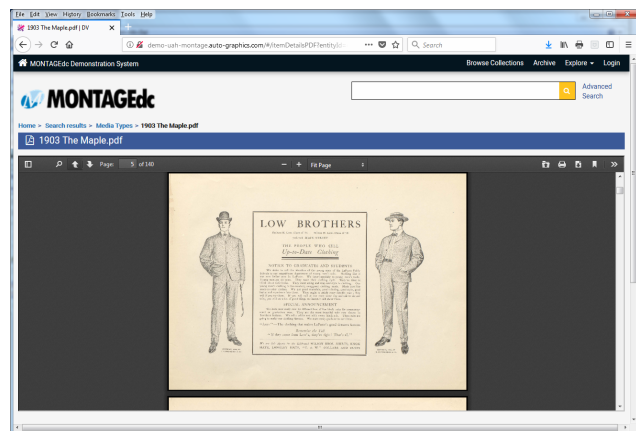


*Video Player*

## 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.
  - 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.



*PDF Viewer*




- 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**.

## Working with Lists

Montage provides a “lists” feature that lets you save selected records to an online list. Once a list has been created, you can email the list to yourself or another party. The email includes the title and description for each record saved to the list, along with a “permalink” to the record location within Montage.

**BE SURE** to email your list *before* you exit the catalog. Once you exit Montage, your list is automatically cleared by the system.



## Creating a List

You create a list by selecting records from Brief Browse Lists.

#### To create a list:

1. Access a Brief Browse List containing records you wish to add to your list (see *Viewing the Brief Browse List* on page 13 for more information).

# Montage Search Guide

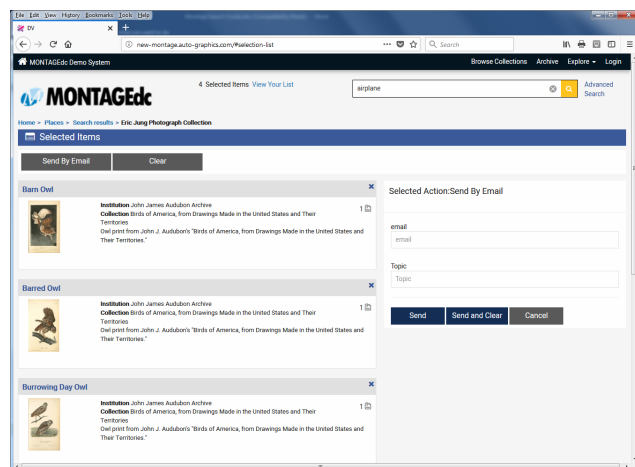
2. Select the “flag” icon in the top bar of each record you wish to add to your list.
  - A *hollow* flag  indicates the associated record *is not* selected.
  - A *solid* flag  indicates the associated record *is* selected.
  - Clicking a flag repeatedly will toggle it on and off.
3. When *one or more* items have been added to your list, the message “# Selected Items” is shown at the top of all system screens (except the Home Page), along with a **View Your List** link.
  - The quantity in the “# Selected Items” message updates each time you add or remove an item from the list.
4. Repeat steps 1 and 2, as necessary, until all desired items have been added to your list.

## Viewing and Managing Lists

The Selected Items screen lets you view the contents of your list, remove one or more items from the list, email the list to yourself or another party, and clear the contents of the list.

### To view the contents of a list:


- Click the **View Your List** link at the top of any system screen (except the Home Page).
  - The Selected Items screen displays.
- The left column of the screen shows the records in your list.
  - Each entry in the list shows the record title, the **Institution** and **Collection** with which the record is associated, the item description, and a thumbnail of the item attached to the record.
- The right column of the screen contains the **Selected Action** panel. The **Selected Action** panel displays the **Send By Email** fields by default.
  - If desired, click the **Cancel** button to clear the contents of the **Selected Action** panel.



*Full Display*

### To remove records from the list:

Once a record is removed from the list, it can only be returned to the list by reselecting the record from a [Brief Browse List](#).

- To remove a *single record* from the list, click the  in the title banner of the record you wish to remove.
  - The selected record is deleted from the list.
- To remove *all records* from the list, click the **Clear** button.

## Montage Search Guide

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### To email a list:

1. If necessary, click the **Send By Email** button to display the **Send By Email** fields in the **Selected Action** panel.
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 values in the **email** and **Topic** text boxes, *or*, click the **Send and Clear** button to send the list and clear the contents of the **email** and **Topic** text boxes.
5. If desired, click the **Clear** button to remove *all records* from the list.

## ***Montage Search Guide***

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