

collections

MOSAIC *ic*

Version 10

Pictorial Update Guide

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collections Mosaic

Version 10

Update Guide

We Listened...

We owe a huge debt of thanks to you – our clients – for being so enthusiastic in the use of “Mosaic” (as you so fondly call it) and for keeping in touch with us to let us know what you feel Mosaic should be doing.

We responded...

There are many improvements in Mosaic version 10, some technical, some aesthetic and some which bring a whole new raft of features to excite you or just make life simpler for you.

Many of the improvements to Mosaic are best described in the context of the form that is used to exploit the functionality concerned.

To that end, the following pages take you on a logical journey through the Mosaic screens, explaining the improvements on the way.



However, some improvements are not related to any particular form...

“Behind the scenes”

1. Full Professional Functionality

In a move to simplify administration and increase value for money, there will no longer be Standard & Professional editions.

Every user of Mosaic will get full Professional functionality!

2. IST Code

To improve efficiency, your IST code is your key to free support. It is clearly displayed on key forms.

3. Efficient focus

After clicking on any top row button, the focus automatically returns to the data.

4. Efficient pop-ups

Pop-up confirmations all default to the most commonly used option, making a simple press on “Enter” sufficient.

5. Comprehensive setup

The folder structure is more organised, to make things more understandable.

In fresh installations, folders for exports, reports, web pages etc. are created automatically.

6. Smooth upgrade

Version 10 installs happily alongside previous versions, without affecting them at all. This enables you to familiarise yourself before making the switch. You can even migrate your version 9 data at a later date – when you are ready to start using version 10 with your existing data.

You can still keep version 9 installed and usable as long as you wish, to observe the two versions side by side.

When you are happy, simply stop using version 9 and when you are ready to do so, uninstall it.

7. Safer Backups and secure location

The files that change when you do your work are in a separate folder called “DATA”.

This makes backups even easier and quicker than before. Simply copy this one folder.

Restores will be safer and quicker too.

There is even a reminder upon exit to take a backup (this only arises if any data has changed).

The default location of the Mosaic software has been moved away from your computer’s critical software, for better security and to better suit corporate I.T. policies.

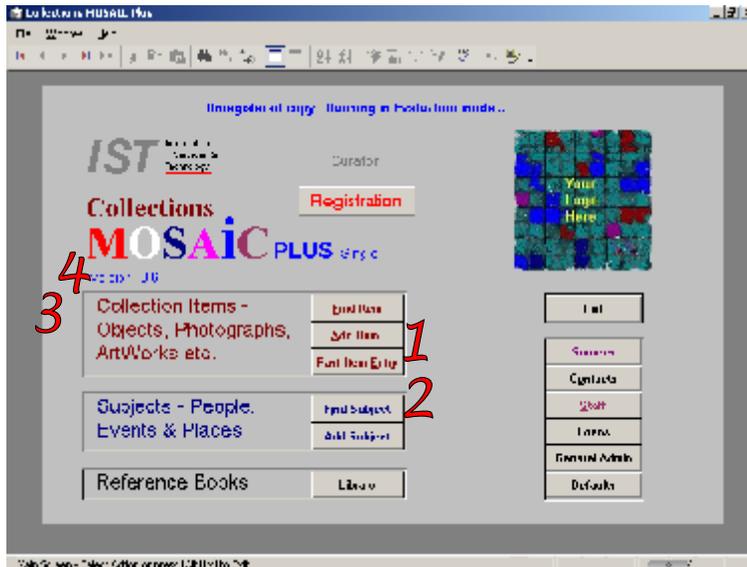
The default location of the Mosaic software is now;

```
C:\ISTechnology\MosaicPlus10
```

So your Mosaic data is now in;

```
C:\ISTechnology\MosaicPlus10\DATA
```

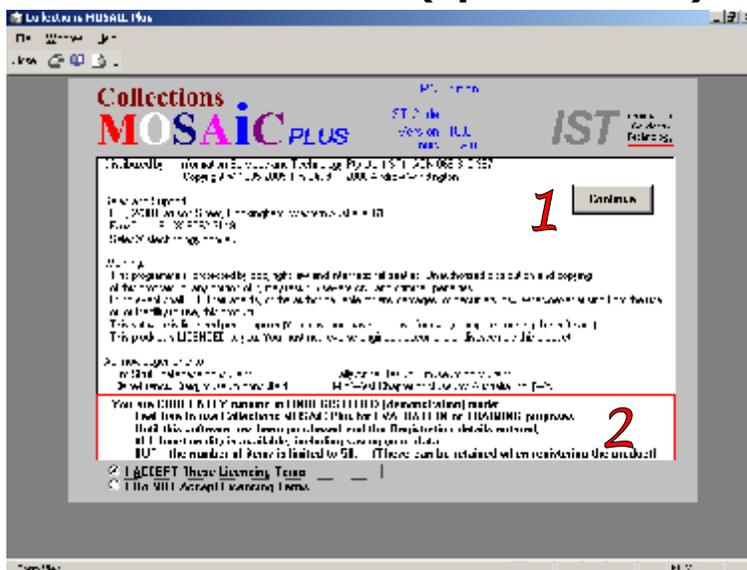
Entering Mosaic



Only minor changes to the main entrance have been made, to retain familiarity.

1. Longer button labels, to enhance the understanding and ease of use
2. Minimal Data Entry for new Items is now accessible directly from the front door
3. Your IST code – required for support calls.
4. A reminder of the program’s version number.

The License screen (Splash screen)



A few simple changes have been made to the Splash screen (License screen).

1. The OK button is now more accurately named “Continue” and is the default action, so simply pressing Enter is sufficient to move on into Mosaic.
2. For unregistered users, a reminder of the limitations until registered. This automatically disappears upon registration.
3. The License Screen is superfluous when in Training mode, so it automatically disappears after a few seconds and the program moves on to the main form.

Registration

The screenshot shows the 'Registration' form in the Mosaic application. The form is titled 'MOSAIC PLUS' and includes a 'Print or send your registration' button. The form contains several sections:

- 1**: A large text area on the left with instructions and a red box containing a warning: 'When registration, if you need to change your Institution Name or Town / City in the future, you will need a new I.I. code. The I.I. ID of change from I.I. Just not.'
- 2**: A 'Logo' field with a preview of the Mosaic logo.
- 3**: A 'Logo Position' field with a dropdown menu.
- 4**: A 'Logo Size' field with a dropdown menu.
- 5**: A 'Number of Licenses' field with a dropdown menu.
- 6**: A 'Save + Close' button at the bottom right.

More information is displayed and more information can be entered.

1. More extensive section on what to do when things change.
2. All Email addresses in Mosaic now hold up to 120 characters.
3. Space for technical information about the computer and/or technical support information (e.g. who looks after the computer) provides useful assistance to IST when support calls are required.
4. The Logo that appears on the Main form can now be placed on reports / letters, if desired. The position of the logo and the organization address are configured here. Either or both can be changed any time, by re-visiting this form.
5. The number of licenses purchased is entered, providing the means to automatically control usage of the system. One more step in helping the Curator monitor the system they are responsible for.
6. All Close buttons that automatically save any data changes upon closing the form are now more clearly labelled "Save + Close"

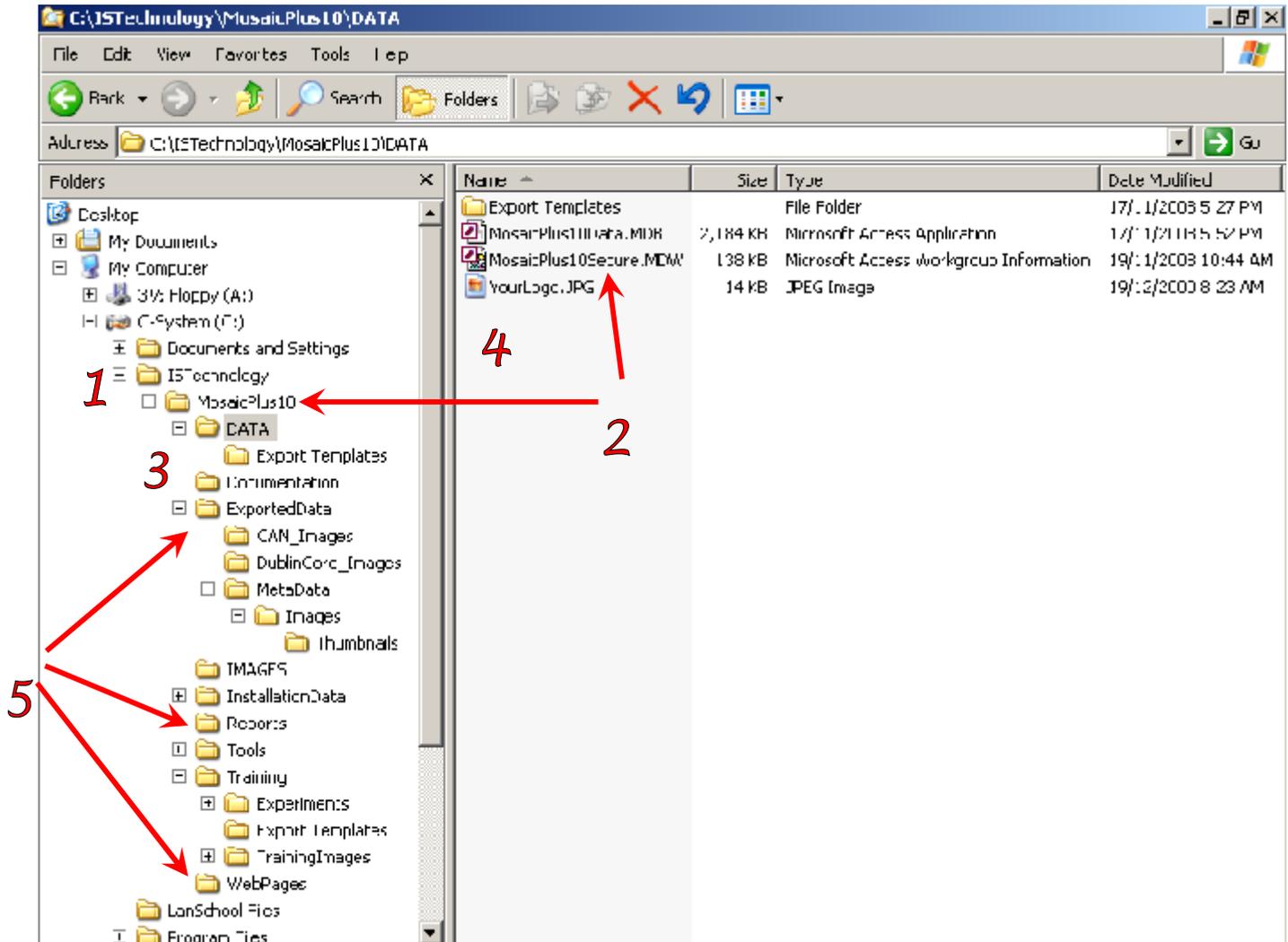
Leaving Mosaic

The screenshot shows the main menu of the Mosaic application. The menu includes options like 'Collection It Objects, Ph ArtWorks at', 'Subjects - People, Events & Places', and 'Reference Books'. A 'Curator' button is highlighted with a red box and the number 3. A warning icon with the number 1 is next to the 'Collection It' option. A red box with the number 2 is around the 'Collection It' option. A red box with the number 3 is around the 'Curator' button.

A minor, but important change to the exit from Mosaic.

1. Upon clicking on Exit, if (and only if) there have been changes made to the data, a mini-window pops up to emphasise the importance of backups. Also to help with backups, the data files are in their own folder with an emphasised name - DATA.
2. Popup mini-windows are now convenience-oriented. The default button is the one used most often, so simply pressing "Enter" is sufficient in most cases.
3. When using Training, the License screen automatically disappears as you login. And this backup reminder does not popup as you leave Training.

Location of Mosaic Data



The folders & files have changed for better security & easier maintenance.

Changes to the Mosaic Folders & Files

1. Better Security
 Whilst the location of the Mosaic system can still be placed anywhere, the default location is no longer under Program Files.
 This will better suit the usual security policies of enterprises and government organizations.
2. Distinct new Names
 The version 10 Mosaic folder uses a different name "MosaicPlus10" by default, so it can install and run alongside version 9 without clashing.
3. Separate Data
 The data is now in a separate folder – "DATA" to make backups easy.
 Simply copy the whole DATA folder periodically.
 Restores are simply a case of replacing this folder with the backed up copy.
4. Logo placed centrally
 The Logo file is located with the DATA.
 This ensures changes to the Logo also get backed up.
 This also means the Logo only needs setting up once only, not once per Mosaic computer.
5. Pre-created folders
 To make getting started even easier, folders are pre-created in preparation for creating Reports, Web Pages and other Exported Data (e.g. for Picture Australia & CAN).

Query (Find) forms

All Query (Find) forms have undergone significant improvement.

1. Find button is now renamed "Fetch..." to be more explicit and helpful & to remove confusion over the other "Find" button (that opens a Find form). NOTE – the Shortcut key is the same as before!
2. **Easier retrieval - the default is to retrieve ALL records, if no criteria entered.**
And - **All** text searches in all forms are performed regardless of the position of the text in the field. (i.e. the surrounding asterisks are implied for all searches)
3. A friendlier "Advanced Query" button replaces the SQL button. This Shortcut is also the same as before!
4. Many forms have been enlarged, with several fields larger too, whilst still retaining backward compatibility with existing computer screens.
5. The automatically-updated "Last Edit" fields are more clearly labelled on all forms.
6. Many improvements have been made to form titles, form footers, status bar help and tooltips.
7. All buttons on all forms now have "Hot Key" keyboard shortcuts & those hot keys are unique.
Many additions to tooltips and tags provide a better experience for the vision impaired.

Advanced searching

The Advanced Find form (used to be called SQL) is more helpful than before.

1. Improved button labelling clearly identifies their purpose.
2. A larger box for entering the search text, especially useful if you wish to use CTRL + Enter to put each clause on a separate line for readability (as above)
3. Useful hints and information to guide you through the most common tips & tricks, complete with examples.
4. Curators can choose to put ALL the retrieved records into edit mode, in preparation for a global edit.
NOTE – This action overrides the restriction that automatically puts "completed" records into read-only mode. Thereby enabling global edits, even on completed Items.
5. Larger font size in the search box makes it easier to edit the query text.

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Sources - finding

The Sources Find form has room for even more data.

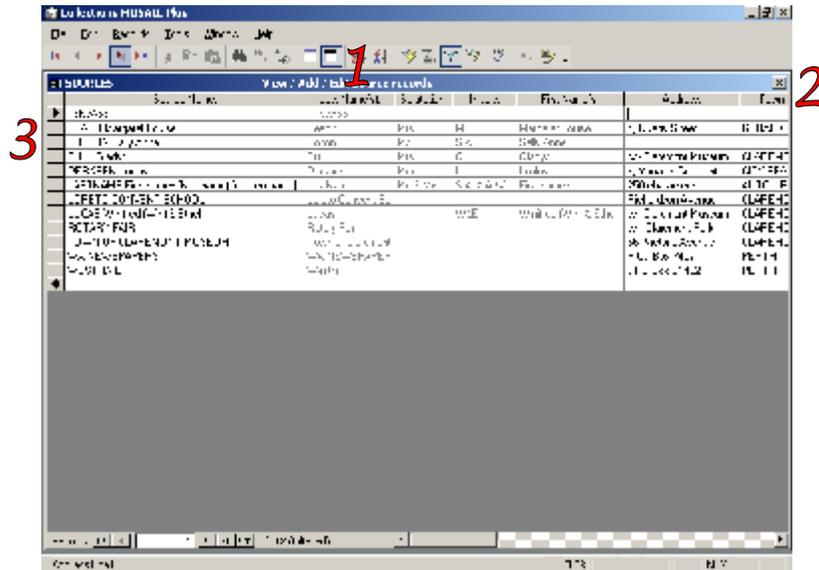
1. All Name fields in Mosaic now enlarged to hold up to 80 characters.
2. Up to 11 characters allowed for the Initials, to cater for joint donors.
3. Longer State & Postcode to cater for international addresses (revised on letters too).
4. Mobile phone number is a new field.
5. All Email Addresses in Mosaic are now enlarged to hold up to 120 characters.
6. As the Deceased field is not used until later (if at all), it has been sidelined out of the way.

Sources - viewing / editing

The Sources update form has had similar improvements to the find form.

1. Salutations list is editable, via the Defaults area.
2. Longer State & Post Code to cater for international Sources.
3. New Mobile Phone Number field.
4. All email addresses in Mosaic are now enlarged to hold up to 120 characters.
5. Notes field now allows up to 65,000 characters.
6. Skeleton (Template) letters are now edited via the Defaults area. The button has been removed from this form.
7. Records are now fetched in name order.
8. The confusing internal record number is now not shown on any form. (Used to be in the top left-hand corner).

Tabular views



All view/edit forms now have the option of switching to/from a tabular view.

1. A tabular view is available by clicking on the "Datasheet View" icon on the menu bar.

To switch back, simply click on the "Form View" icon to its left.

Although the view is different, the validation rules still apply and drop-down choices are still available.

NOTE – Some keys work differently in the Datasheet, e.g. Page Down jumps several records, not one at a time.

2. You can still safely "Save & Close" by clicking on the of the inner window.

Note - you cannot switch between read-only mode and edit mode once in the Datasheet view.

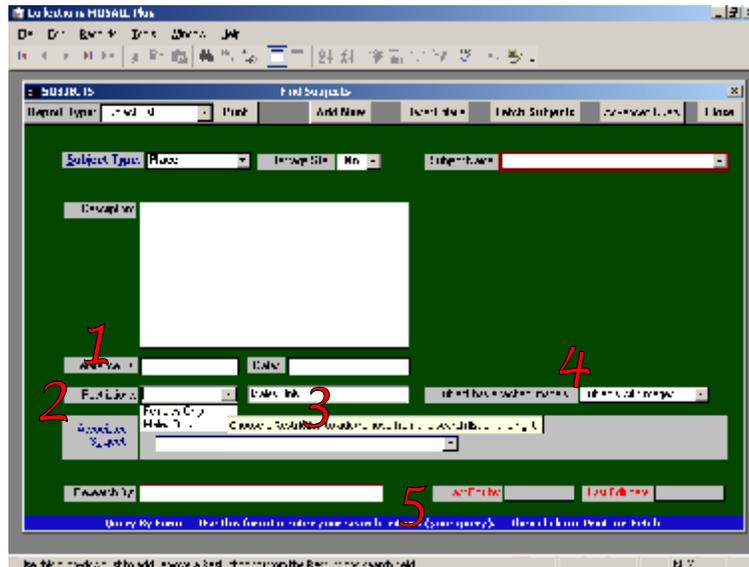
3. In a fresh Mosaic installation, the <<N/A>> (Not Applicable) Source record is not there by default. You may now create your own "N/A" or "Unknown" record using your own terminology.

TIP – The new default source for a new Item record is no longer <<N/A>>, it is simply the 1st Source record (alphabetically). So if you wish a particular Source to be the default temporarily, simply pre-pend their Last Name with an underscore (e.g. _Whittington).

When all their Items have been added, simply retrieve the Source record and remove the underscore.

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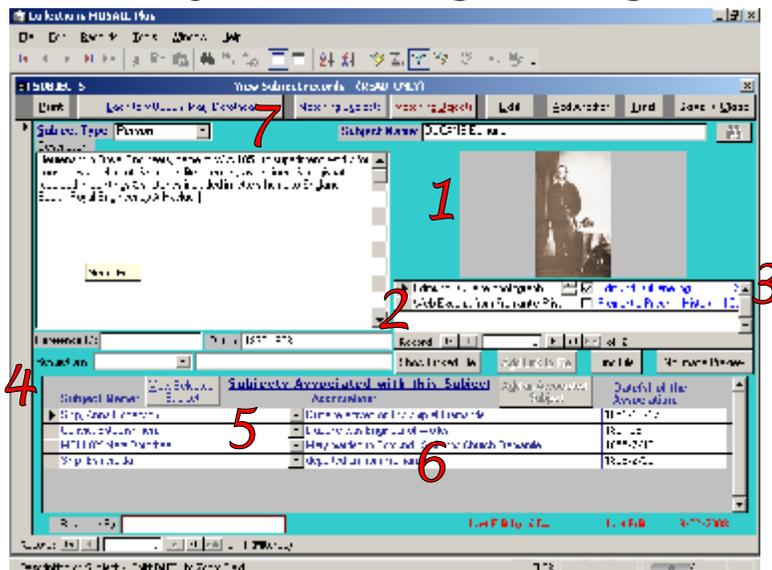
Subjects - finding



Clearer button text and larger fields are features of most of the forms.

1. The old "Number" field is relabelled "Reference ID" to more clearly emphasise the textual nature of the field and its purpose for assisting unique identification of a Subject.
2. The new Data Restrictions System applies to Subjects as well as Objects. It is enabled in the Defaults form.
3. You can use Restrictions "Keys" for searching as well as for restricting data access.
Choose multiple keys if you wish. Each selected key appears on the right of the list.
Selecting a key a second time removes it from the search criteria.
4. Subjects now have the same Multimedia capabilities as Items.
Whether or not a Subject has one or more attached images (or other files), can also be used as a search criteria.
5. Subjects (as with any data type) can be retrieved by the person or date of their last update.
Remember Dates can be entered using slashes (1/1/01) or dashes (1-1-01) or spaces (1 1 01) or even alphabetically (1 Jan 01 or 1 January 2001).
Remember you can use before and after tests easily and it works with dates too...
e.g. > 10-Oct-07 will retrieve Subjects that whose last edit was **after** 10th October 2007

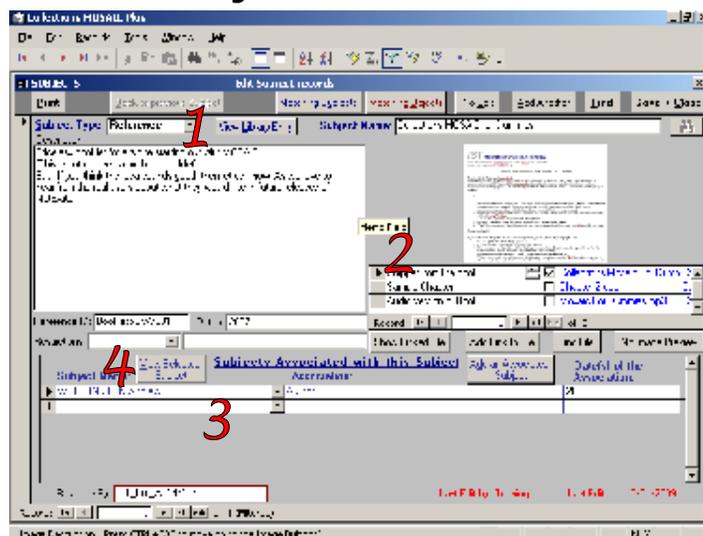
Subjects – viewing / editing



The stories behind the Subjects can now be even richer.

- Subjects now have the same mechanism as Objects for linking to external multimedia files, providing a richer tapestry for Subjects and your Mosaic stories as a whole. Using the same mechanism as Objects, maximizes your existing familiarity with the way images work with Objects.
- As with Object records, you can link any file of any type, even saved web pages. Clicking on the Show button for a web page will automatically open up your web browser and – if your PC is connected to the internet – you are immediately in cyberspace.
- The path to a linked file is slightly exposed, to accentuate its existence,. You can view or edit the path if needed.
- If a Subject must only be accessible to certain people, add one or more Restriction “Keys”, ensuring the appropriate people (Staff logins) have the appropriate Keys on their Key-ring.
- Associations are the indispensable glue that binds all the individual records – into a whole story. Using them fully is paramount to the completeness & quality of the interpretations in your “Mosaic”. The purpose of the data and buttons in the Associations list have been made clearer on the form.
- Viewing associated subjects is even easier – just double-click anywhere on the association to be immediately taken to a view of that Subject.
- Keep track of where you’ve come from, by observing the button at the top. Click to return to the previous Subject.

Subjects – Reference

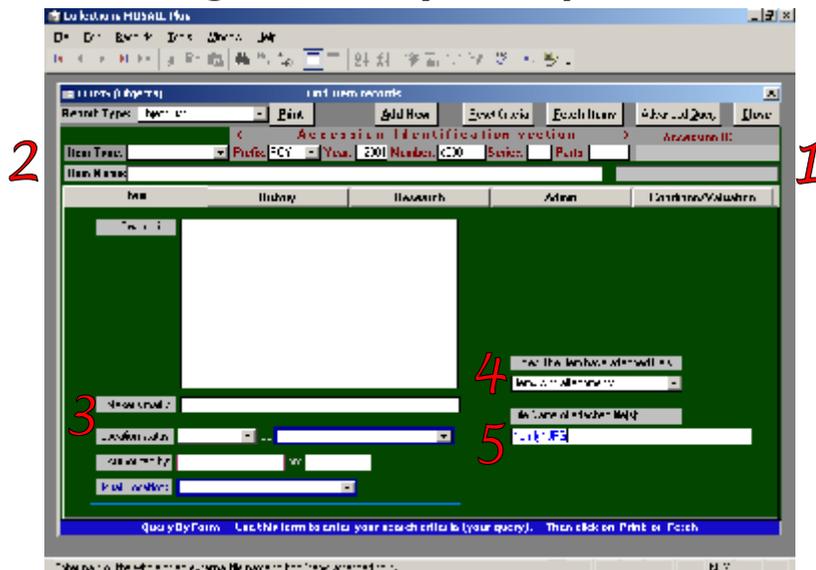


- A new “Reference” type of Subject allows a greater depth of background to be written about a publication in your Library. This new type of data also allows the publication to be searched for at the same time as other Subjects.
- As with Object records, you can link any external file, of any type, even saved web pages or multimedia files.
- The reference subject now allows the publication to be associated with Objects & other Subjects. This extra type of data and the extra glue it provides greatly extends the richness of your “Mosaic” of Heritage.
- Once glued together with Associations, finding related data is a one-click operation.

This type of Subject is only created via the Library. From the Library record, then simply click on “Add/View as a Reference Subject”. A Reference Subject record is created with some appropriate data (if not already there).

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Finding Items – by descriptive data

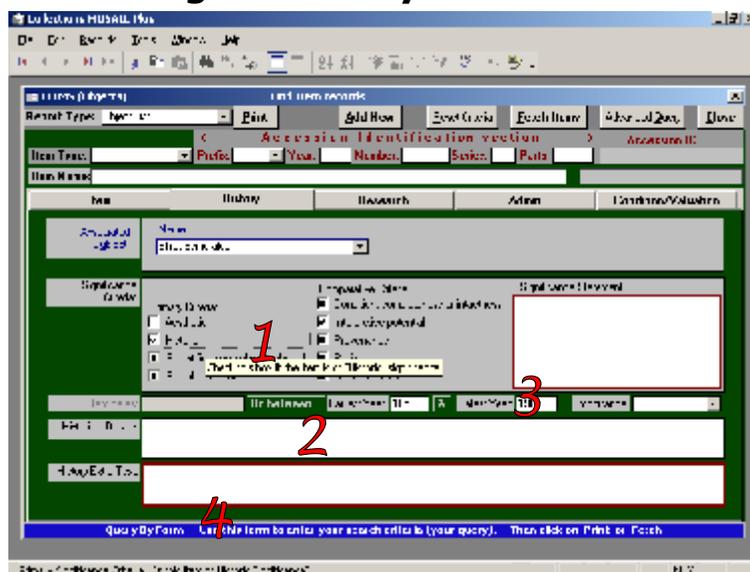


The changes are mainly aesthetic, but make searching even easier.

1. As an Item's unique identity is so crucial, the ID section has been accentuated and labelled more clearly
2. The form layout is determined by the first 4 characters of the Item Type. For example, add your own type starting with "Photo" and the form layout will change to suit Photographs.
3. The Maker's marks (maker's inscription) is clearly labelled
4. As Items may have attachments of ANY type, not just images, the search question reflects this.
5. You can now even use the name of an attached file to search for Item records.
And with the use of wildcards, this extends the search even more,
e.g. enter *.mov to retrieve all Items that have a movie attached!

Note – there is no longer a restriction on only fetching 32,000 items at a time. You can now retrieve 2,000,000+.

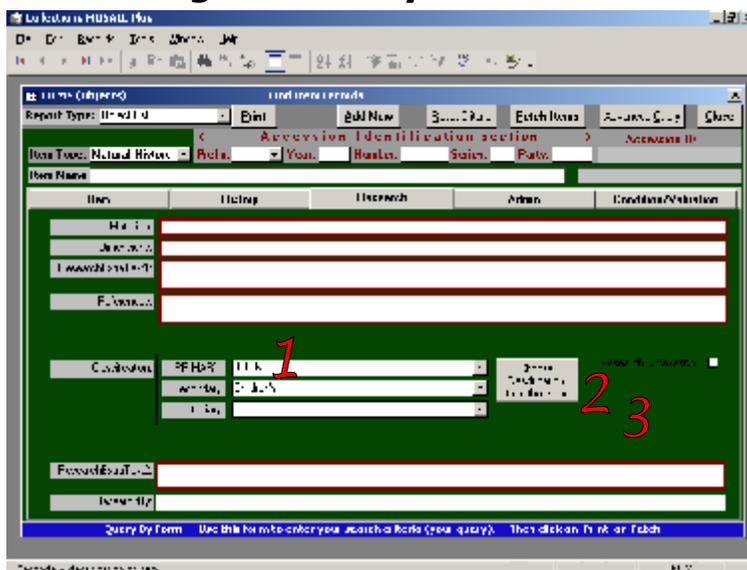
Finding Items – by historical data



The major change here is the optional "Extended Significance".

1. When the new "Extended Significance" is turned on (in the Defaults area), the Primary and Comparative criteria can be chosen by tick-box.
This makes searching by Significance even easier.
2. New search boxes make searching by Item Date within a range easy, without having to enter the Advanced Searching form.
3. All fields that have an Authority List attached now have a bolder outline.
This serves to remind you of the fields where you can press * to raise a list of suggestions.
4. Many forms and the fields within have been enlarged.

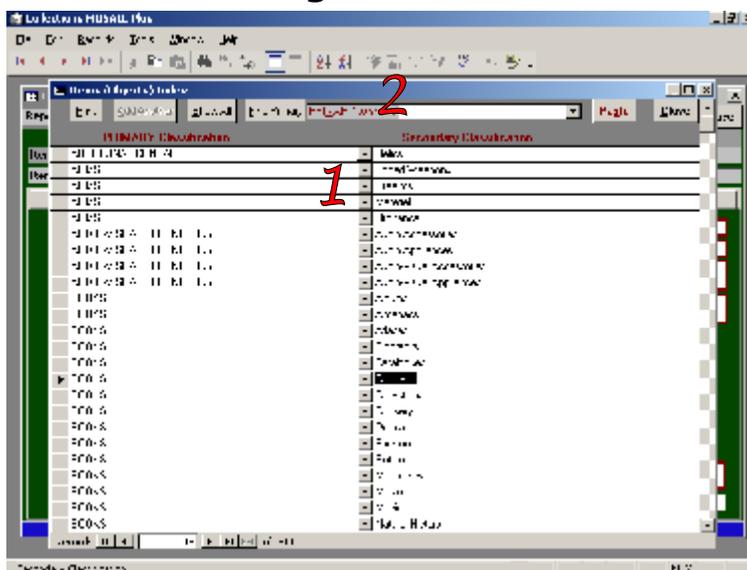
Finding Items – by research data



The major change here is the Classifications.

1. The Item Type is no longer tied to the Primary Classification, so searching for BOOKS will retrieve all items classified under BOOKS, regardless of their Item Type.
2. In addition to the easy drop-down lists, the "Choose Classification from the Index" button can be used to view the entire listing of Primary + Secondary Classifications, making classifying much easier.
3. All changes to the Classifications Index are now made via the Defaults area. So this button is for searching only.

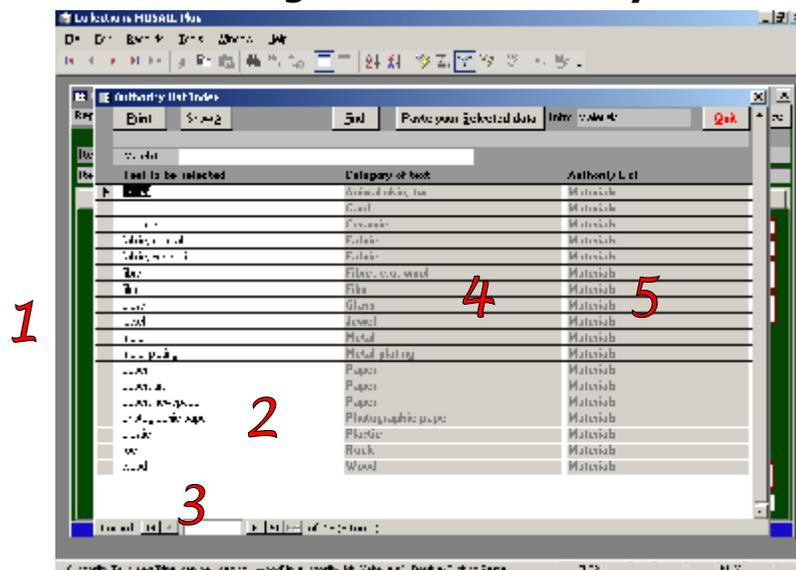
Choosing Classifications



Clicking on the button on the previous page raises the new combined Classifications form.

1. Both Primary and Secondary classifications are handled in the same form.
In this view, the form is read-only - for selecting the Primary & Secondary combination you desire. Simply click on the line with the Primary + Secondary combination you require, then click on "Paste".
2. There are controls at the top for assisting with your view. For example, you can "filter" the view and limit the visible list to just one particular Primary – choose the Primary using the "Primary to show" drop-down list, then press Tab or Enter.
Click "Show All" to view all Primary Classifications again.

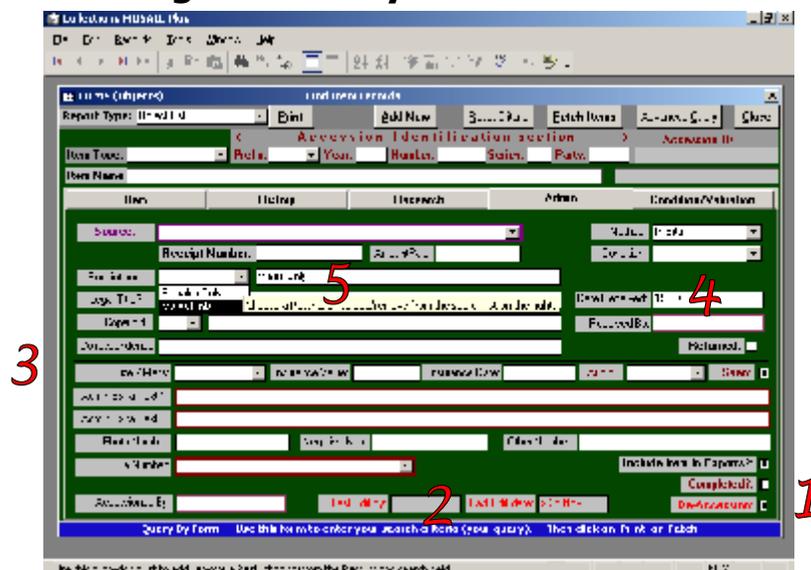
Choosing from an Authority List



The view of the Authority lists has been improved for better readability.

1. The form is larger.
2. Increased content is possible, with up to 40 characters in each entry.
3. The default content has updated entries.
4. You can now see the category of each entry (as defined by the Curator) and the name of the Authority list. The sequence is Category, then the entry within the Category.
5. User-defined fields each have an Authority list and the chosen name for the field appears here in column 3.

Finding Items – by administrative data

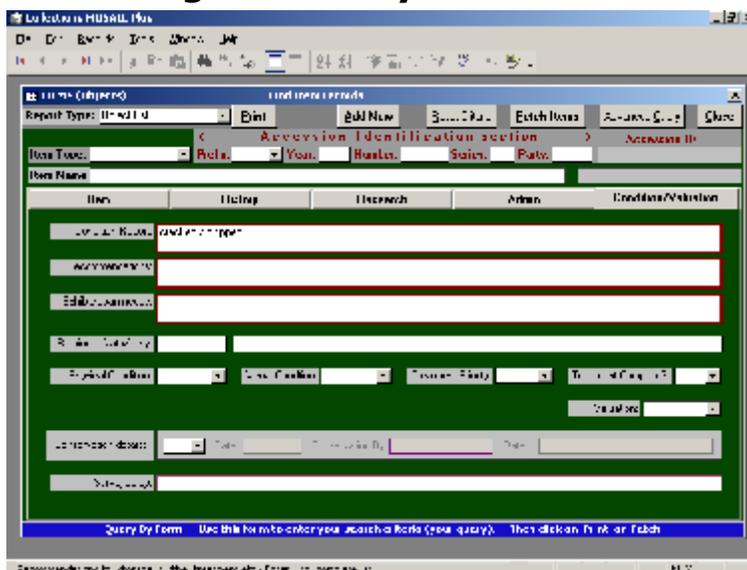


Apart from a bit of enlarging & tidying up, the big change is the new Restrictions System.

1. The status tick-boxes are relabelled and re-aligned.
2. The Edit tracking fields are more clearly labelled for easier searching by person or by date.
3. Various fields are relabelled for better clarity and ease of use.
4. The "Date Received" is often not precisely known. This field is now textual, so a precise date can be entered, or an approximation such as "Early 1980" or just 1970s
5. The main purpose of the new "Restriction Keys" are to limit the access to sensitive records to only staff with an appropriate key.

But an extra side-effect is that one or more keys can be selected and used as search criteria.

Finding Items – by condition data

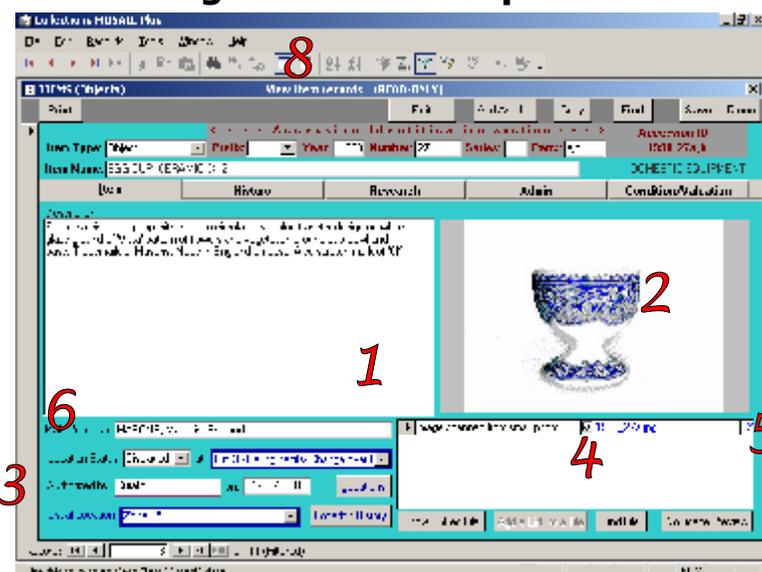


1

A little tidying up.

1. Minor relabelling and accentuation of the fields with Authority Lists are the only changes here.

Viewing Items – descriptive data



8

7

2

1

6

3

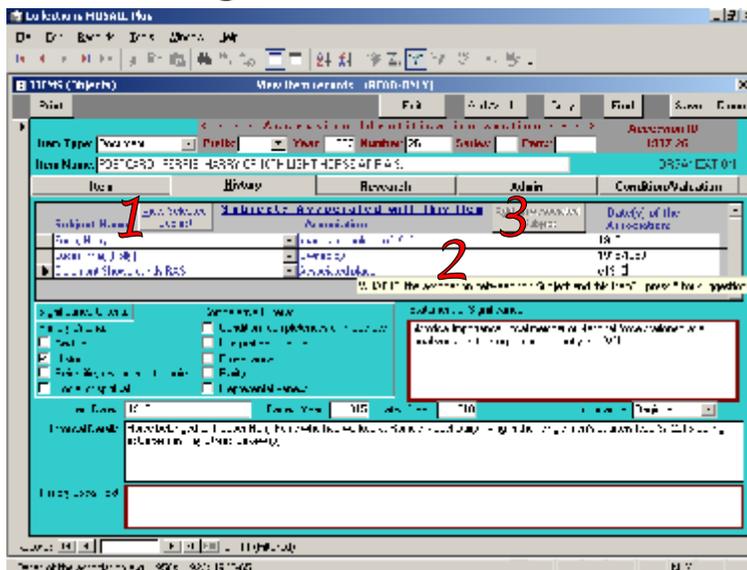
4

5

More space, more information, clearer labelling.

1. More room to see more information. The Description can take more than 65,500 characters.
2. With the better technology of today and the incidence of attached images becoming more common, the Image Preview is ON by default.
3. Several fields have clearer labelling, especially the Location fields
4. Change which of the images is the default easily, with just a click in the box next to the desired image. As well as changing the tick, the new default will automatically move to the top. This is the image which will be present on Reports and web pages. NOTE – only previewable images will accept promotion to “default”
5. A peek of the path is visible, to remind the viewer of its presence - just out of full view.
6. Marks is renamed “Maker’s Marks” to clearly emphasise it’s purpose (as opposed to blemishes).
7. Items are now retrieved in Accession ID order.
8. They can , of course, be re-ordered once you have retrieved them. Simply click in the field you wish to use for the sequence of the records, then click on the ascending or descending sort icon on the Menu Bar.

Viewing Items – historical data

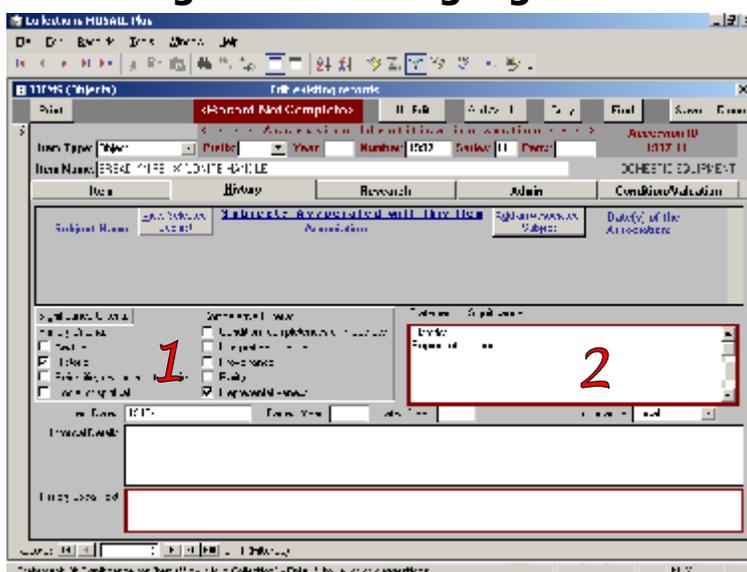


Easier to follow the "story".

1. The "View Selected Subject" has been relabelled to emphasise the need to "select" the Subject before clicking the view button.
2. Or just double-click **anywhere** on an association line, to open up the appropriate Subject Record. This facility works identically in the Subjects form too.
3. The titles and notes around the Associations have been improved to assist in the understanding of this section and how to use it.

For example, the "Dates" column has been re-titled "Dates of the Association" to emphasise these are the dates of the association, **not** the dates of the Subject.

Editing Items – using Significance



There's even more help now with the Significance Statement.

1. Tick boxes for Significance Criteria, grouped under the standard Primary & Comparative Significance sections, makes it easier for staff to start identifying the significance of the artefacts. Whilst this is not intended to replace or circumvent the Significance Statement in full, it will at least start the process and make the Statement completion a little easier.
2. Automatic Statement prompts - as the tick boxes are selected, the phrases are automatically inserted into the Significance Statement, giving a start to the Statement process. Pressing * in the Statement Of Significance still opens the Authority List as before.

Editing Items – adding details

The Significance Statement is still highly important.

1. At some point after the prompting criteria phrases are in the Significance Statement, the statement should be completed in full, perhaps with each criteria on a fresh line (remember Ctrl+Enter to get new lines).
2. Even after a Statement has been entered, more criteria can still be appended by simply clicking more criteria tick-boxes and / or adding more detail to the Significance Statement.
3. The Significance Statement can now hold up to 65,000 characters.
4. The General Notes have been aptly renamed "Historical Notes" and are now always present, even when History & Research tabs are combined.

Fast Item Entry

As well as easier access to this form, the form has been simplified.

1. The "Returned" flag & the "Completed" flag are irrelevant at this "initial" item entry stage.
2. With the removal of unnecessary fields, the Description and Significance have become larger.
3. The Last Edit fields are automatically filled in during Item Entry, and serve no purpose on this form as their initial values are obviously the current user and the current date. They are still, of course, present on all other forms.
4. The default Source is now flexible – the initial suggestion is no longer fixed, it is simply the record with the lowest (alphabetical) Source Name. This is the same in the full Item Entry too.

If an "<<N/A>>" Source (or similar) is present, it will perform as before.

But if a particular Source is required to be the default temporarily, whilst all their Items are added, their Last name can be temporarily prefixed with a non-alphabetic character e.g. "_Smith" (or similar).

Once the Items are all added, the Source record can then be retrieved and the "_" removed.

5. When a location name is changed, an option is provided to update all affected Item records.

Item Listings

The screenshot shows the Mosaic software interface with a list of items. The list has several columns with headings. A red '1' is placed over the column headings, and a red '2' is placed over the print icon in the toolbar.

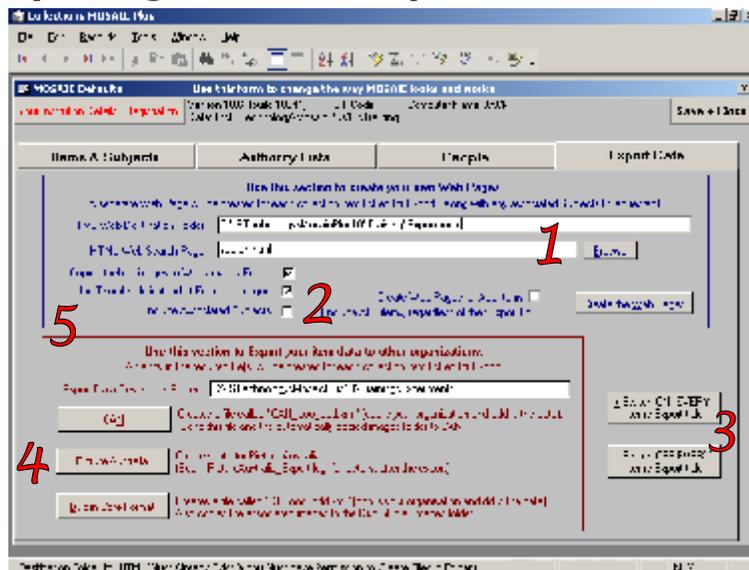
Item ID	Title	Author	Subject	Call Number	Location	Status
1001
1002
1003
1004
1005
1006
1007
1008
1009
1010

Heading appear on "lists".

1. List-style reports now have column headings.
2. All print actions still preview first, but they now automatically open in "maximized" view. The view can of course be changed once open. The normal view is returned upon closing the print preview.

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Exporting Item data – pre-defined formats



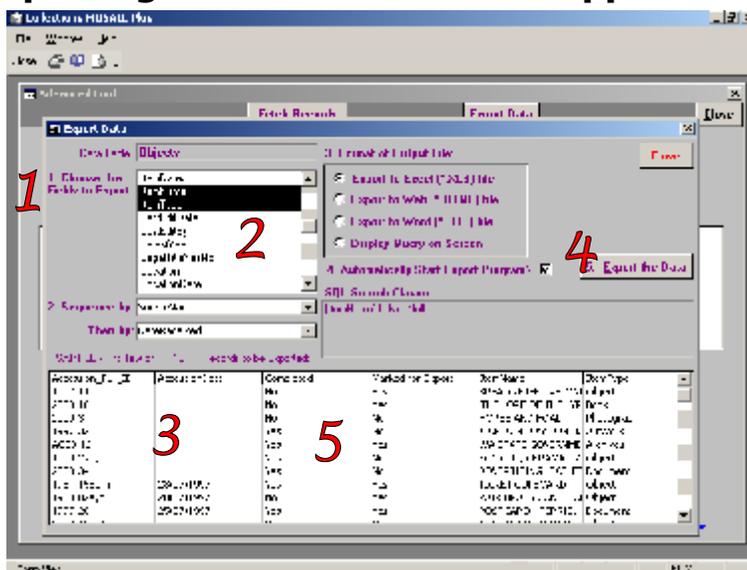
The Exports tab of the Defaults has undergone major renovations.

1. The Name of your Pre-formatted web pages now match the Accession ID (or Subject Name).
2. Images can be kept separate (instead of being embedded **inside** the web page) – this is the default. Thumbnails can be created and used to reduce the web page size - this is also a default. Only relevant (associated) Subjects are exported, Subjects are omitted by default. There is a new option to produce web pages for ALL Objects, regardless of their export tick.
3. Buttons facilitate the removing or adding of the Export tick on ALL Object records at once.
4. Create Pre-defined Exports for external organizations – CAN, Picture Australia, even the international standard “Dublin Core” format (XML), for sending anywhere that supports the standard. Folders to receive the data are created as necessary and an export report is produced.
5. The “TNGen” Thumbnail Generator is included in this release with no need for a separate license. Thanks go to Stefan Huber for his cooperation.

TNGen is user-friendly and can be used independently of Mosaic.

To do so - use Windows Explorer to find the MosaicPlus10\Tools\TNGen folder, then right-click on TNGen.exe, choose “Send To” > Desktop (Create Shortcut). In future, you can simply use your new Desktop icon. (For the techno-phobes – the TNGen tool does not require installation)

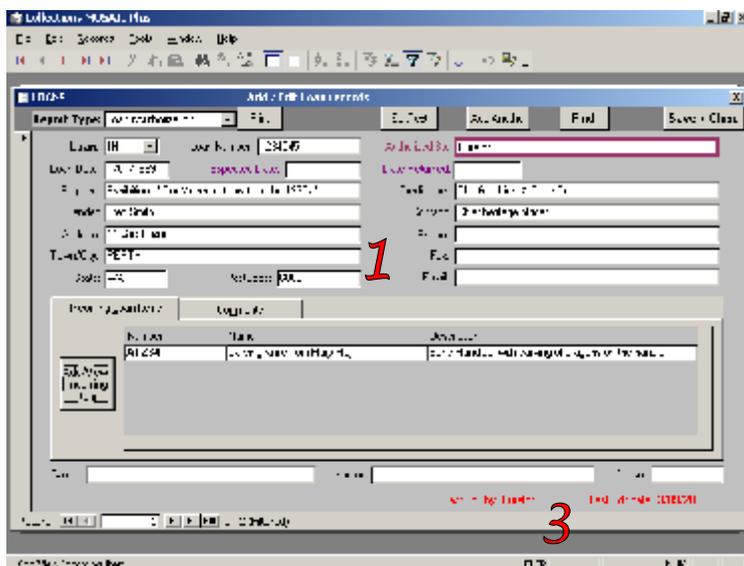
Exporting Item data – to other applications



Choosing your own data to export, in your choice of format, is even easier than before.

1. Changes to the labelling + numbering of the steps make the process even easier and clearer.
2. Many of the internal database column names have changed to make them easier to understand. In the Objects table, all the parts of the object identity start with "Accession", with the field that holds the entire combination being renamed "Accession_Full_ID". **New** - these fields are sorted alphabetically, to help you find what you want.
3. A larger form makes more fields visible and provides a bigger area for your sneak preview (of the actual data).
4. The Automatic opening of the appropriate application, for display of the exported data, is now ON by default, making the usual process even easier.
5. Although tick-boxes are usually held internally as zeros and ones, the export process changes them all to "Yes" or "No" to make the output more friendly and readable.

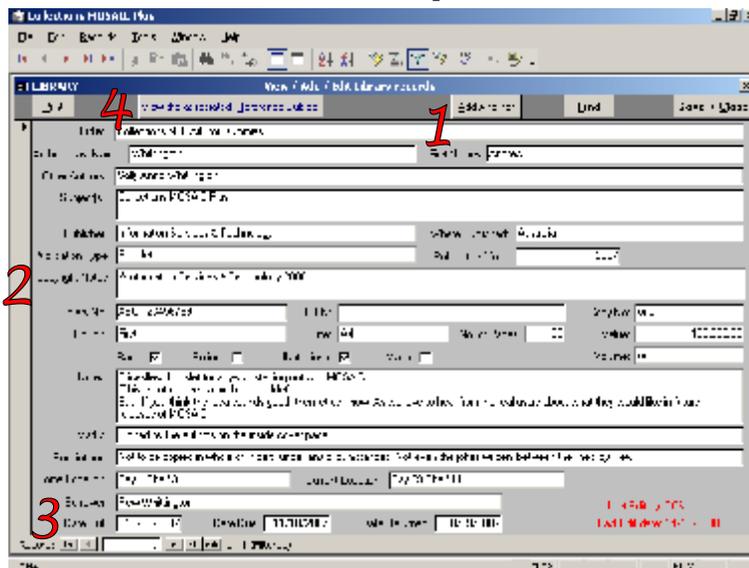
Audits & Loans



The changes to the Audits forms and Loans forms have been minor cosmetic improvements.

1. As with all the forms, the size is increased and fields re-aligned.
2. The Close buttons have been relabelled to "Save + Close" on all edit forms, as a reminder of the automatic saving of data.
3. The Last Edit fields have been re-labelled for better clarity. Where possible, the Last Edit fields have been moved to a common place – bottom right-hand corner.

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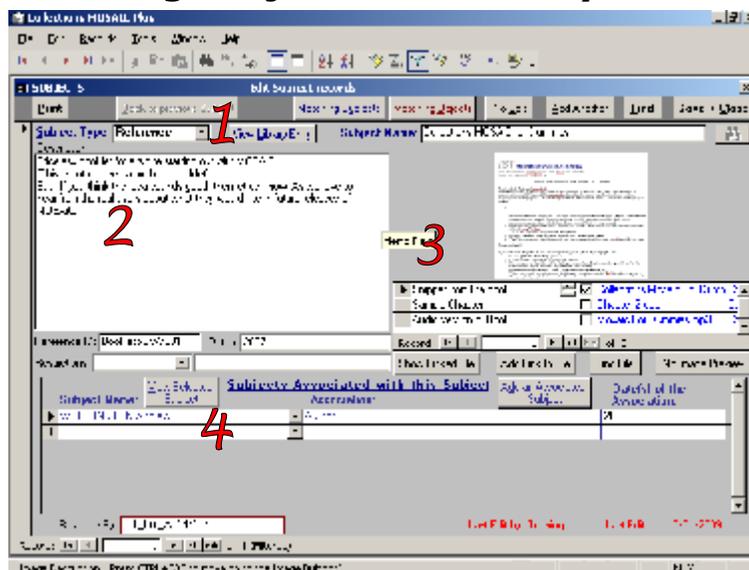
In addition to cosmetic improvements, there are functional improvements behind the scenes.

1. All Staff can now add Library records.
2. A new Copyright Notes field has been added for copyright information.
3. The Date Out, Date Due & Date Returned are more flexible.
All three are optional and are independent, to cater for any situation.
4. Library publications can have related Reference Subjects.

Clicking on the "Add an associated Reference Subject" button on will create a "Reference" type of record in the Subjects table and link this publication to that Subject record. (See next page below)

In future, when viewing this publication, the button will read "View the associated Reference Subject" & Clicking on it will simply open that Subject record for viewing / editing.

Creating Subjects from Library entries



A "Reference" type of Subject can be created from a Library record.

1. When first created, the "Reference" Subject is immediately opened for viewing / editing.
This will enable further reference information to be written about this publication, to further enhance the global information accessible via this Library record.
2. The data in the Reference record is initially pre-populated using the data in the Library record, giving a good starting point and immediate information available when searching Subjects.
3. remember - Subject records can have unlimited multimedia files attached to them (of any type), enhancing the potential to enrich the information accessible via the library publication.
For example, a recording of a book reading could be attached. It could then be played without leaving Mosaic.
4. Having a Subject record for the Reference information also provides the opportunity to link that reference Subject to other Subjects (and Objects if desired), taking the reader / researcher even further!
The boundaries are unlimited!

The Defaults form

The screenshot shows the 'MOSAIC Defaults' window. At the top, there are tabs for 'Items & Subjects', 'Authority Lists', 'People', and 'Export Data'. The main area is titled 'Accession Identification section'. Red callouts are placed as follows: 1 points to the top right corner; 2 points to the 'Accession ID' field; 3 points to the 'Combine History & Research?' field; 4 points to the 'Default Path to Images' field; 5 points to the 'Correct Path' button; 6 points to the 'Natural History' checkbox in the 'Add New Item' list; 7 points to the 'Auto-Capitalisation' checkbox; and 8 points to the top left corner.

The Defaults area is one of the most important areas within Mosaic – where **you** control the way that Mosaic works for you. You could compare it to the Ship’s Bridge.

The area has undergone massive improvements - for extra simplicity & for extra functionality.

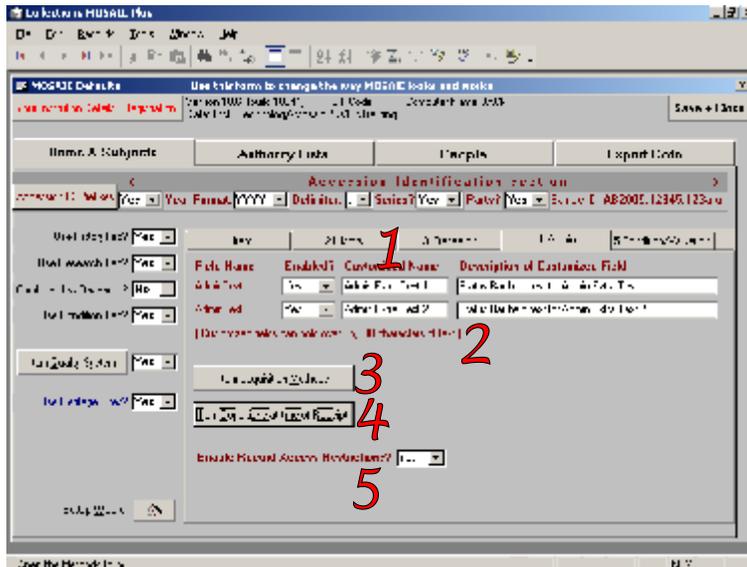
1. The Accession Identification section is outlined for accentuation and it exactly matches the Item form.
2. Fields in the accession ID have Clearer labelling + bigger labels.
3. A new Yes/No field makes it easier to choose whether to combine History & Research.
4. Where possible, labels are less terse and are clearer, especially the Default Path to Images.
5. The ability to correct the path has always existed, but is now easier due to the new button.
6. A new Item Type is included – Natural History.
7. A new facility, ideal for Living Museums etc., allows the auto-capitalisation of Item Names to be turned off. It is still ON by default (as before).
8. Ever wondered what the name of your computer is?

When contacting IST for help with anything, the information at the top of the Defaults area will help enormously.

It will also help your own IT person to be able to quote your computer name and the location of your Mosaic data.

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The Defaults form – Admin sub-section



More customisation available and an extra level of access control.

1. Your chosen Label for a Customised field is now up to 18 characters) & the help text can be up to 120 characters.
2. **All** 5 Customised fields can now hold over 65,000 characters each, providing even more flexibility.
3. The drop-down list for choosing Item Acquisition Methods can be completely customised.
4. The drop-down list for the Condition Upon Receipt can also be customised.
5. There is a new (optional) Record Restrictions facility;

This new facility exists to control who can access selected Item records.
Ideal for sensitive records...

A "Key" word or phrase can be entered for one or more Item records.

An Item record can have multiple "Keys" (like a set of padlocks).

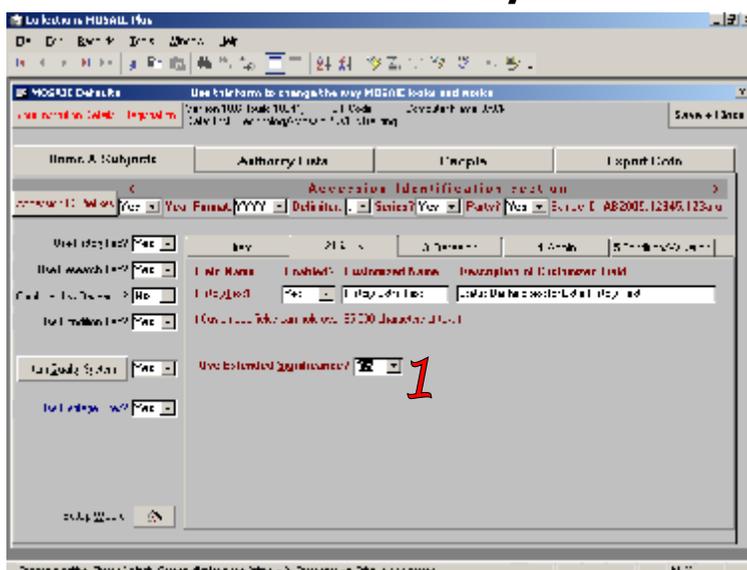
"Keys" can be added / removed at any time.

"Keys" can only be created by a Curator, but are then available in the drop-down list for all staff to allocate.

Staff records are allocated one or more "Keys" by the Curator (like a key ring).

Only staff with **all** the **keys** to unlock **all** that record's **padlocks**, are allowed to access that record.

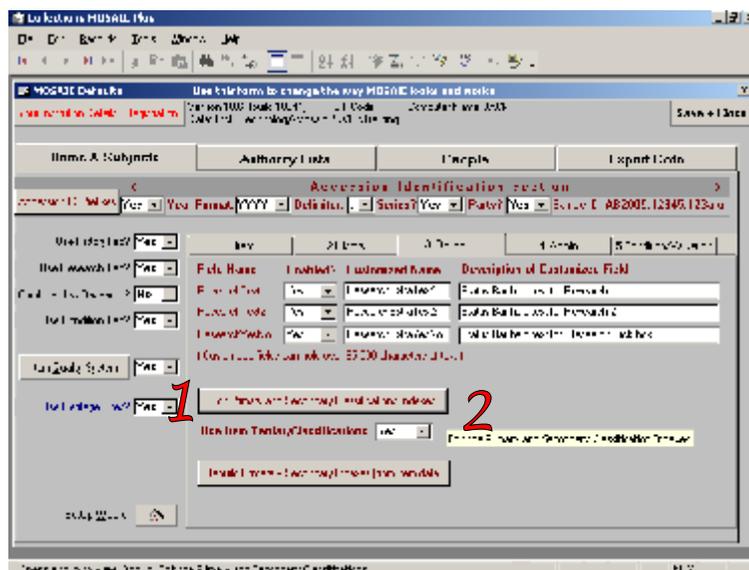
The Defaults form – History sub-section



Extra help for Significance is another new feature.

1. Enabling the new "Extended Significance" activates a set of checkboxes for helping the significance assessment. The checkboxes list the standard Primary & Comparative Significance Criteria. These boxes can then be ticked to give a starting point for significance assessment. Also – when this facility is enabled and the checkboxes used, it will greatly enhance the searchability of Items via their significance.

The Defaults form – Research sub-section



Classifications tuning is now in a safe place.

1. Classification System editing now in the Defaults form

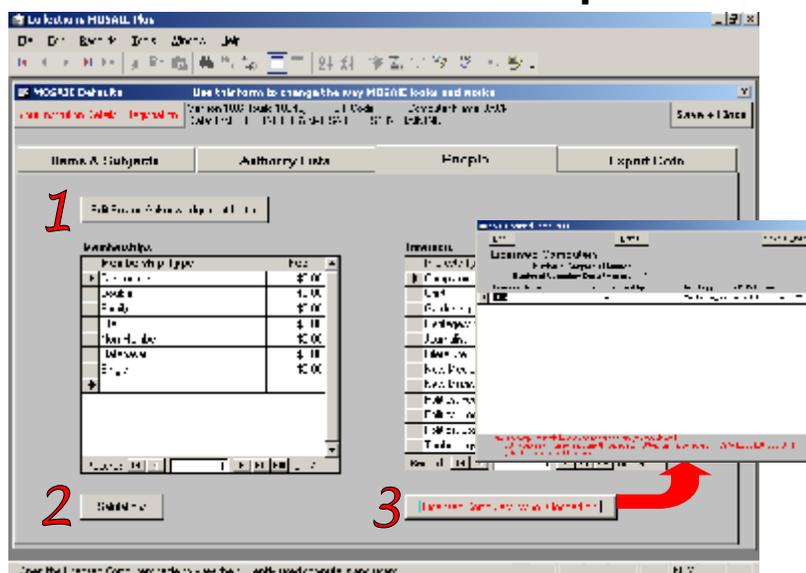
Classification System is now configured using the same form for Primary and Secondary levels.

As before, the lists can be printed for inclusion in tailored documentation / staff procedure manual.

2. Classifications now independent

The Primary Classification is no longer tied to the Item Type, to give greater flexibility and re-use of the same classification across Item Types.

The Defaults form – People



Even more customisation possibilities + extra control for the Curator.

1. Letter templates editing, e.g. the skeleton for acknowledging Items received, is no longer on the Sources form.
2. The list of Salutations for use in editing Sources or Staff records can be fully edited.
3. At the click of a button, the curator can easily see who is logged in and who is using which computer.

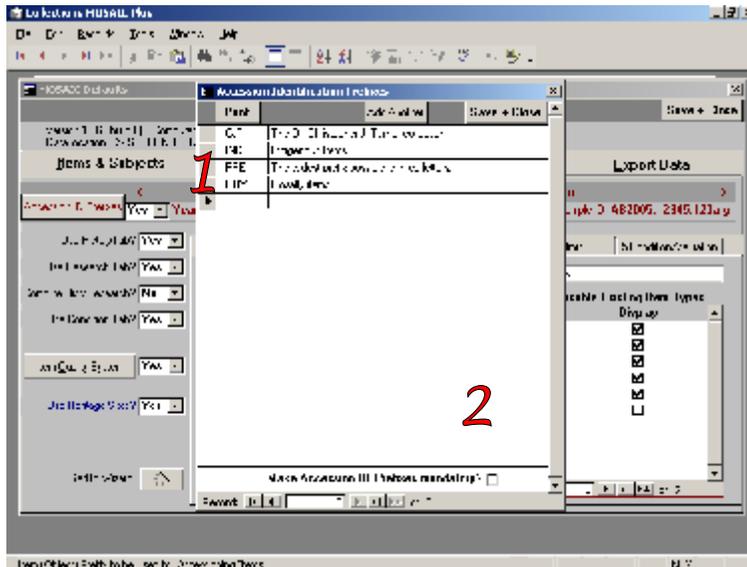
Ideal for networked Mosaic systems.

A user can also be logged off by the Curator (but not before their work is saved).

Use the Reset button to refresh the list of users without leaving the form.

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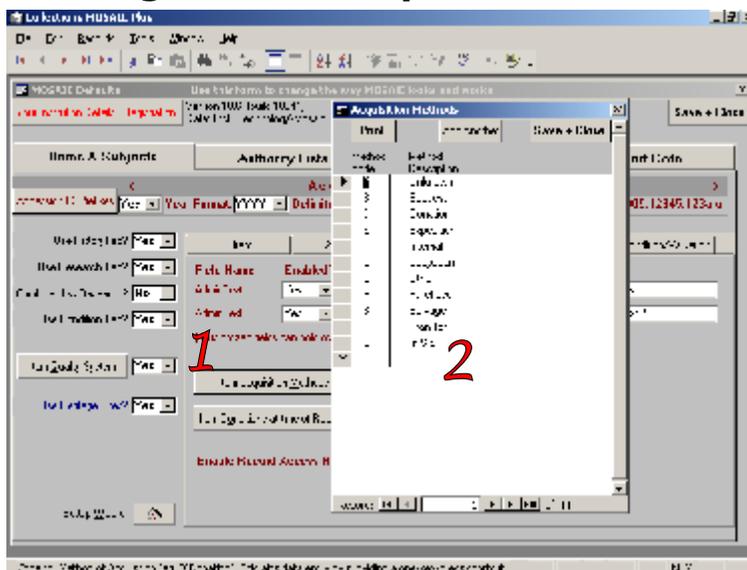
Configuration - Prefixes



Even the Item Prefixes form has been renovated.

1. A 3-character prefix easily fits in its wider box.
(Remember the Prefixes can be less than 3 characters)
2. To cater for clients who want ALL Items to have a prefix, the tick-box here will remove the blank option and enforce Mandatory Prefixes.

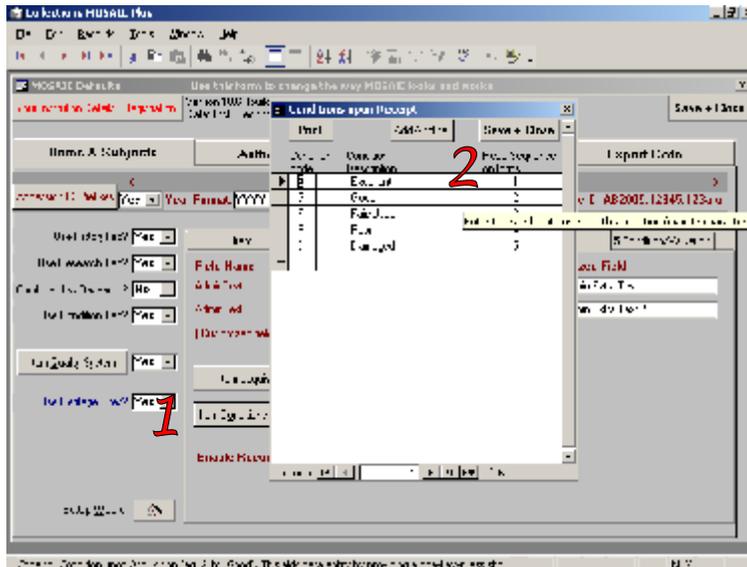
Configuration – Acquisition Methods



1. Methods of Receipt is now editable via a button in the Item section of Defaults.
2. A new Acquisition Method is included in the default list – “In-Situ”, to indicate the item was found on the premises. Nobody knows how or when it arrived.

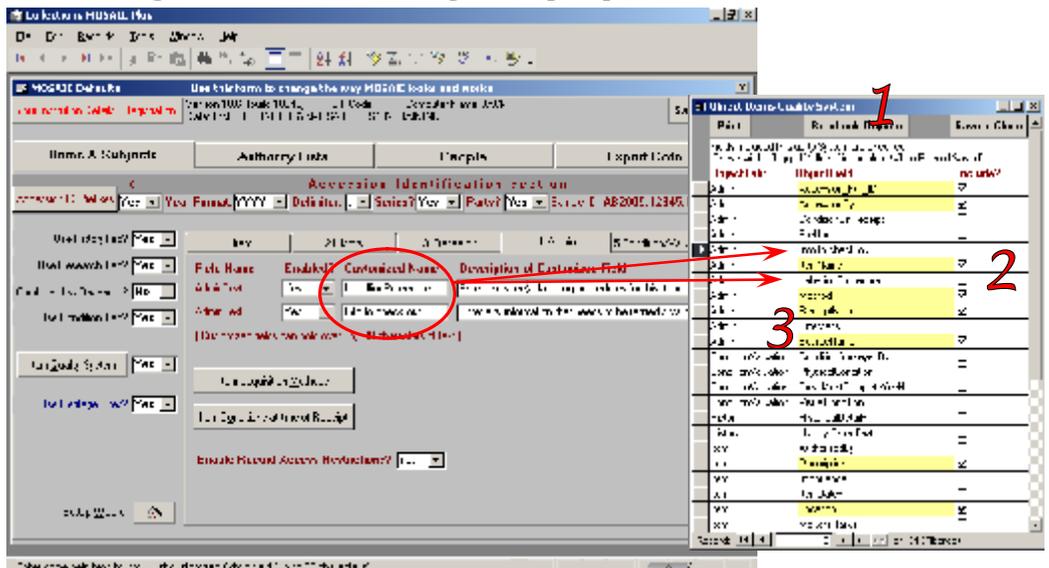
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Configuration – Receipt Conditions



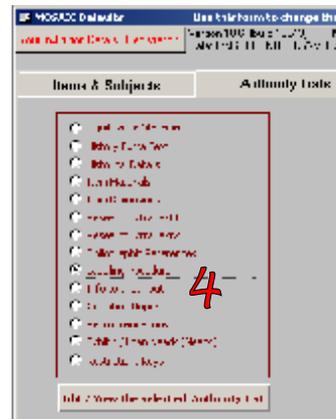
1. The initial Item Condition is now editable via a button in Defaults.
2. To make Item entry even more efficient, the order of the entries in the list can be changed by simply editing the ranking on the right.

Configuration – The Quality System



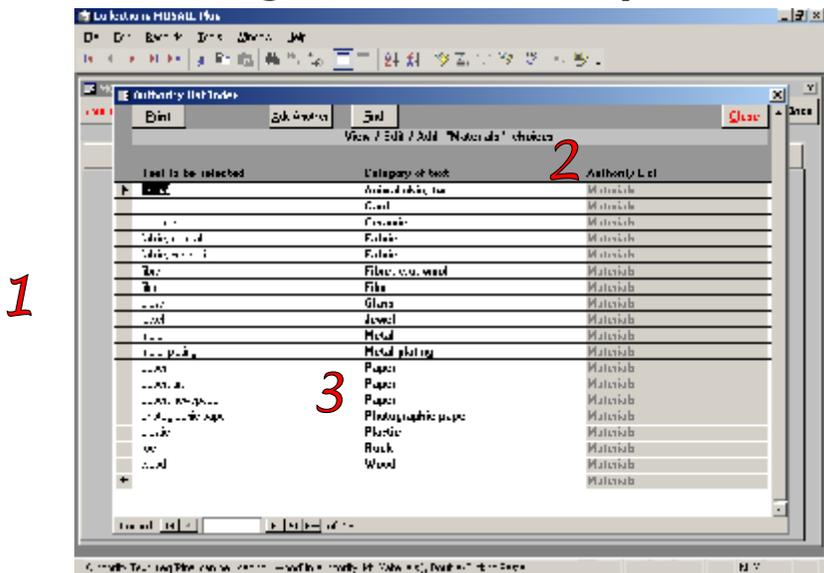
The Quality System has been made more robust.

1. An extra button provides the ability to re-check all the Items immediately to see if they pass the quality check. This is recommended after changes to the selection of fields that constitute a “quality” object record. Note – As the Item Quality System is only applied when an item is marked as “completed”, when any item’s completed status is un-ticked, the quality status is removed from that item.
2. The User-defined fields in the list are labelled using the name the Curator chose when defining the fields.
3. The Size/Mass field can now be un-ticked.
4. N.B. The Curator’s chosen names for the Customised fields are also reflected in the Authority lists, tab, where the Curator can pre-define values for completing these fields.



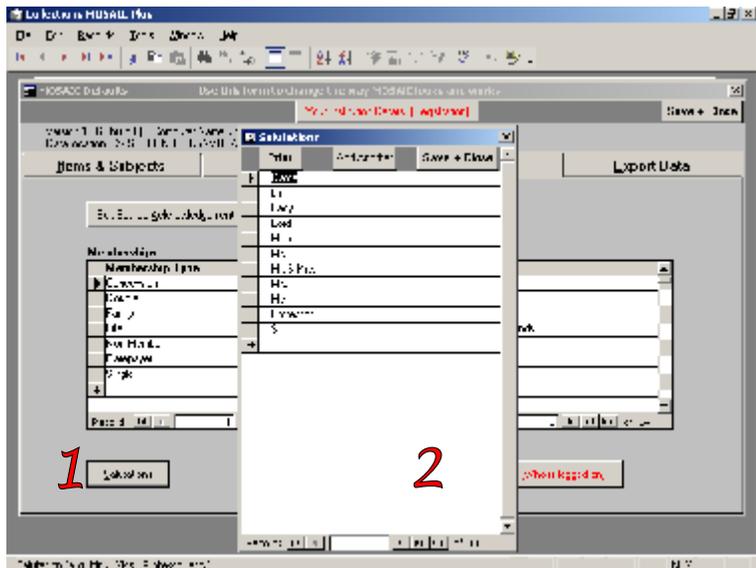
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Configuration – Authority Lists



1. The content and appearance of the Authority Lists has been updated.
2. A reminder of which list is being updated appears at the top and as an extra column.
3. The list is sorted by Category, and the Entry within that Category.

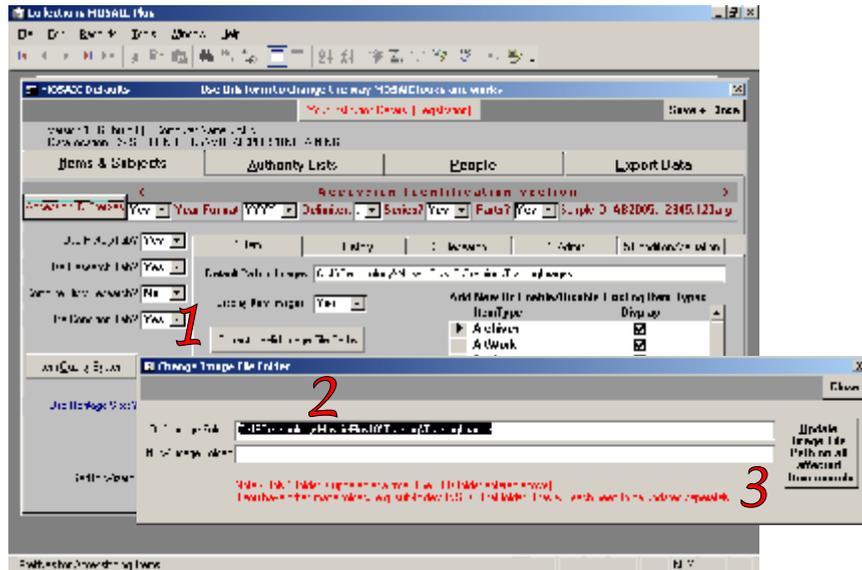
Configuration - Salutations



- Salutations can be tailored to your needs.
1. The "Salutations" button on the People tab of the Defaults now enables Salutations to be edited.
 2. The "Salutations" form is the same, familiar style of edit form used for other drop-down lists.

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Configuration – Correcting Image Paths



When an images or multimedia folder is moved or simply renamed, multiple Objects & Subjects could be affected. The Default Image Path only provides a “Start from here” facility when adding more Images.

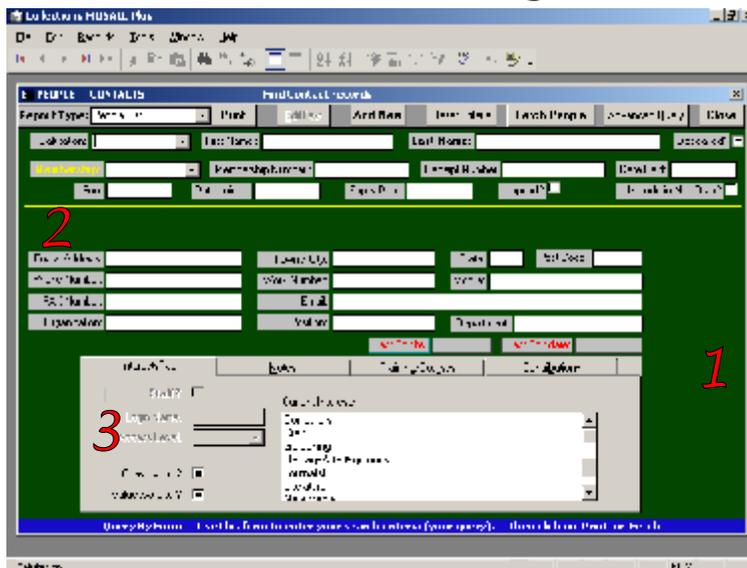
When an entire folder has been moved or renamed, all the images in that folder need to be re-connected to their Mosaic records.

There is a form which will enable you to re-connect all the Objects & Subjects records that refer to that moved or renamed folder.

1. A new button – “Correct Invalid Image File Paths” makes it easier to open the form to help correct the problem.
2. The “Change Image Paths” form makes it easy to correct all affected records. Opening the form is easy – via the button on the Item tab of the Defaults form.
3. The labelling and notes on this form have been improved to ensure the right actions are taken.

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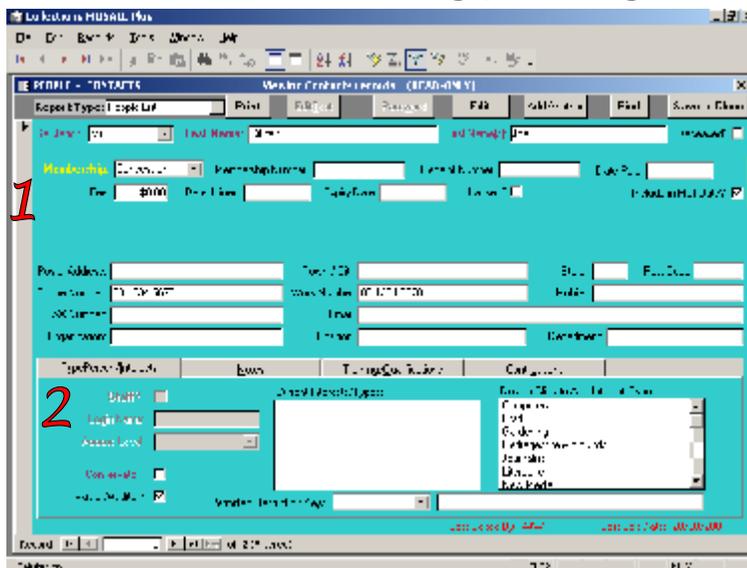
Contacts - finding



The Contacts name and address book is now distinctly separate from the Staff book, although they share the same forms.

1. The Contact & Staff forms open in "find" view, to be consistent with all other forms.
2. The Membership information is clearly defined with a yellow box. This box automatically expands when double or family membership is selected.
3. The fields for Staff data are not appropriate for Contacts and are therefore inactive.

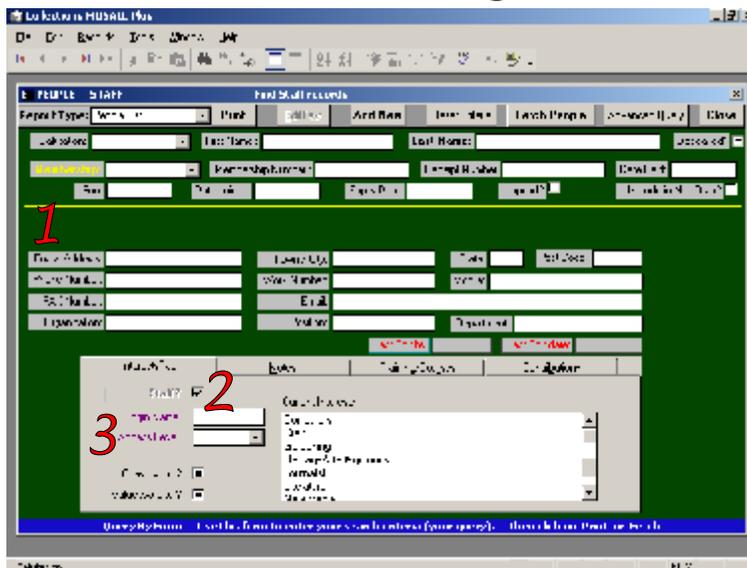
Contacts – viewing / editing



Same changes as the Contacts Find form.

1. The Membership information is clearly defined with a yellow box.
2. The fields for Staff data are not appropriate for Contacts and are therefore inactive, even when the rest of the form is editable.

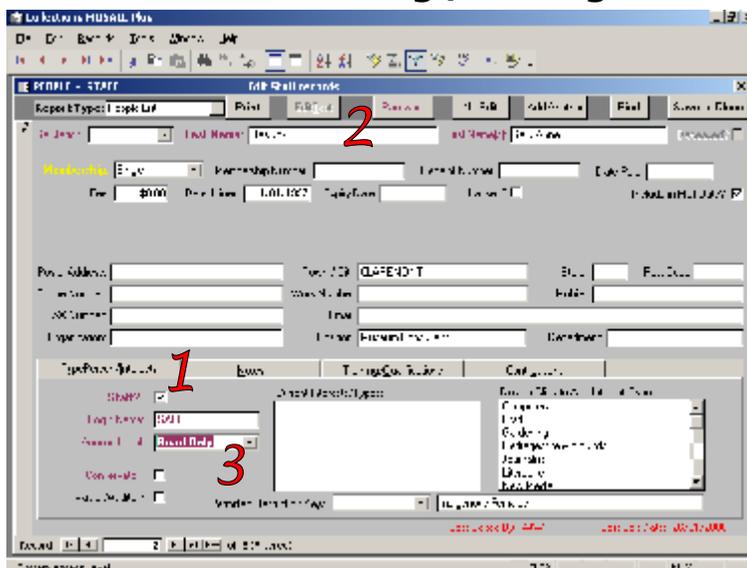
Staff - finding



Finding Staff is similar to finding Contacts.

1. Even Staff can be members of the organisation's membership scheme. The facility is identical to Contacts.
2. The Staff tick-box is automatically turned on for you when searching for Staff records. Staff have login information and an access level, so these can be used in your searching.
3. The Identification box is relabelled "Login Name" to clarify its purpose.

Staff – viewing / editing

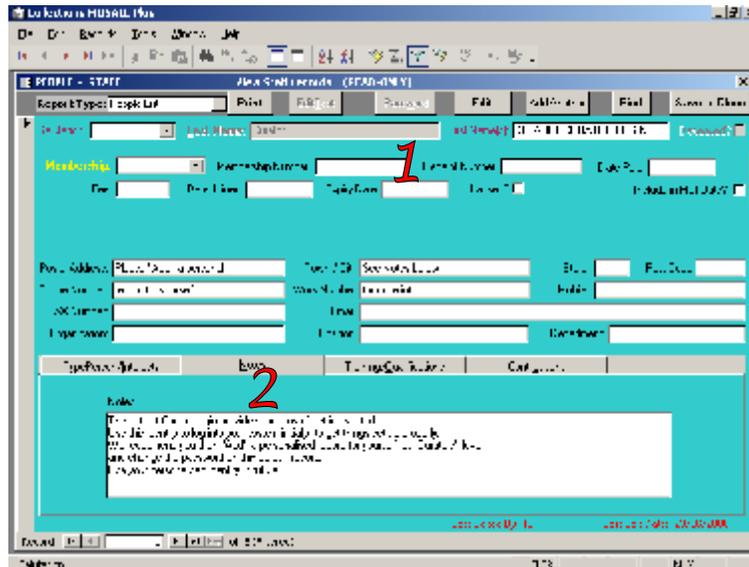


The major changes here are to do with the Login information.

1. Although the Staff tick-box is ON by default (as with the Query form), it can be changed here. This would change a Staff record into a normal Contact, still present in the address book, but unable to log into Mosaic. (Note – as a security measure you must first demote the person to "Visitor" Access Level)
2. The Password button is now at the top, with the other buttons. Remember a Staff member can only change their own password. Failed attempts to change the password raise an error message.
3. An extra level of login user is now available - Read-Only - ideal for reviewers or researchers. A Visitor level user cannot change data and they can only see public data, whereas a Read-Only level user can see **all** the data that a Staff level user can see. But a Read-Only user cannot change anything other than their own personal details.

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Staff – Built-in entries



The 3 anonymous “built-in” Staff records (Curator, Staff, Visitor) are there simply to provide a starting point for new Mosaic installations.

They cannot be removed and should only have their password changed.

A personal Staff record should be created for every user (at the appropriate access level) so they log into Mosaic as themselves, not anonymously.

Even your Curator should have a personal login created, with the Access Level set to “Curators”.

Changes have been made to eliminate confusion and to avoid accidentally treating these 3 existing built-in records as new records.

1. The built-in records are now accentuated by:
 - Inactive Last Name
 - CAPITALISED First Name
 - Comments in various fields, explaining the purpose of these built-in records
 - Inactive Login Name & Access Level
2. As you will see above, when opening a built-in Staff record, the initial view opens the Notes section at the bottom, instead of the Identification section (on the “Type Person / Interests” section).

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Accessibility

Many improvements to Mosaic are will increase usability for those with poor eyesight.

Usability enhancements

1. All buttons have unique captions.
2. All buttons have unique Keyboard Shortcuts.
3. The wording on buttons has been made clearer.
4. "Find" buttons open find forms, "Fetch" buttons fetch records.
5. Many field labels have been made clearer.
6. The tab sequence now follows the natural reading sequence on all forms.
7. Tab successfully cycles from bottom to top and vice-versa.
8. Lookup buttons are also included in the tab order.
9. Increased balloon help (ToolTips).
10. All dummy fields have been removed.
11. After activating a control button (e.g. Add New), the focus immediately returns to the first field on the form.
12. Fields that have Authority Lists have accentuated borders.
13. Pop-up confirmations have the most common choice as the default. So pressing "Enter" becomes the default action.
14. Subject records can have any number of any type of file attached. This will allow multimedia files to be attached to Subjects, providing alternative ways of reading the Subject stories.
15. Improved ALT tags on images.
16. Changes have been made to improve consistency across forms.

Footnote

We thank our industry contacts and consultants for their invaluable help in identifying and evaluating the best improvements to an already popular Collections Management system. It is essential for a Collections Management system to ease the work burden at the same time as guiding the quality of data captured and administration, to ensure high standards in our cultural collections. The goal is quality as much as quantity of data.

We are also extremely grateful to many of our customers for their feedback. It is **your** feedback that guides us in making the software suit your needs and perform as a useful tool to help you do your job easier and quicker.

Thanks and please continue to provide your feedback.