# Getting Started with Portrait Collections Mapping

## Introduction

The aim of the Portrait Collection Mapping project is to identify and provide an online directory of portrait collections in the UK that can be easily shared as 'open data' and accessed at http://www.britishportraits.org.uk/resources/collections/. To achieve this the *Understanding British Portraits* (*UBP*) network has partnered with *Collections Trust* to develop the directory as part of the *Culture Grid* of UK collections.

## First Steps

Contact us at http://www.britishportraits.org.uk/contact-us/ to get a user name and password

## How to create and edit portrait collection records

Once you have your access details go to http://www.culturegrid.org.uk/dpp/home

Click 'Login' on the left side of the screen and enter your access details.

You will come to a 'Welcome' screen - http://www.culturegrid.org.uk/dpp/user

Click 'Editor Home' on the left side of the screen.

This takes you to the 'Editor Home' screen (http://www.culturegrid.org.uk/dpp/edit/home)

On this screen you can either:

- 'Search for records by collection' to **edit an existing record** (near the top of the screen), or
- '**Create a new record**' (near the bottom of the screen)

Whether you are creating a new record or editing an old one you will have the same form to complete or edit.

Clicking on the 'tabs' on the left of the form will take you to different sections of the form and clicking 'submit' saves your record and gives you the option to continue editing it. (If there are any issues with the record being saved, such as missing information that must be entered, an alert should appear.)

Once a record has been successfully submitted it is published and can be found on the Portraits Collections search.

You should fill in as much of the 'identification', 'address' & 'contact information' sections as you can. The other section that is most useful to add information to is 'Lists' which describe the contents of the collection by subject, time & place etc.

Further information on completing specific parts of the form and how to search for records to edit is provided below.

# How to create a new record

First check that a record for the collection does not already exist – you can use the search at: http://www.britishportraits.org.uk/resources/collections/

Click 'submit' under 'Create a new record' (near the bottom of the 'Editor Home' screen) and a blank form will appear - http://www.culturegrid.org.uk/dpp/edit/createCollectionRecord

The form is split into different sections, accessed via the 'tabs' on the left of the form.

You save information by clicking 'submit' at the bottom of any section.

**Note** once you have saved any part of the record it will be published and can be found on the Portraits Collections search.

It is recommended to enter at least the information marked with an asterisk* below.

(All other information is optional and can be added at anytime by editing the record)

**\*Identification section – complete all fields in this section:**

This section is for the basic details to identify and describe a collection.  (The 'Identifier' field is auto-completed with a unique number)

**\*Title** – enter the name of the collection (This could be for the total portrait holdings of an institution or the name of one of several distinct portrait collections within an institution)

**Note**: If there are many collections from one institution being added, please also put the name of the institution after the collection name to identify where the collection is from, e.g. "Portrait Miniatures – Museum of Portraits"

**\*Description** - Clear and concise information describing the nature and scope of a collection: highlight the collection strengths and usefulness to its main audiences. E.g.
- Names of the main/significant people or organisations represented e.g. creators and subjects.
- The range of media in the collection e.g. 'photographs, paintings'.

- Dates covered by the collection, ideally with a start and end date
- Places the collection is about or most relevant to
- Major items/works in the collection

## *Address details section - complete all applicable fields

This section is for the main location of the collection.

## *Contact information section – complete fields with an asterisk*

This section is for the main contact details for the collection (ideally generic rather than personal contact information, as the latter may change more frequently)

**\*Email** – main email address to contact the collection e.g. portraits@organisation.org.uk

**\*Phone** – main phone number to contact the collection.  Only enter numerals e.g. 01234 123456

**\*Related Link** – the full web address of the collection if there is one for the collection, or the full web address of the organisation that holds the collection e.g. http://www.organisation.org.uk/portrait-collection  or http://www.organisation.org.uk

## Administrator information section – optional

This section is for entering a general contact email address for someone or a role at your institution that is responsible for the collection.

## Additional Information section – optional

This section is for entering further detail about the nature, provenance, access, rights and use of the collection

**Language** - The main language applicable to the collection, especially if it is NOT English e.g. Spanish or Hindi, for English please type 'en' in the language field.

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

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

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

**Locator** – DO NOT USE

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

**Owner** – the organisation or person that owns the collection.

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

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

**Access conditions** - Brief general access conditions e.g. 'open to all' or 'open to all on request' or 'restricted access to members only', this field can also include opening times, advice on how to make a booking and reprographic rules but if you can also add this information in the relevant fields below.

**Access Controls** - any access restrictions placed on the collection, including allowed users, charges, etc.

**Accrual Status** – the accrual policy (closed, passive, active, partial/selective), accrual method (purchase, deposit) and accrual periodicity (closed, irregular, periodic) of the collection

**Accumulation Date Range** - The range of dates over which the collection was gathered

**Legal Status** - the overall legal status of the collection, e.g. rights governing use of the collection and the items within it

**Custodial History** - any changes in ownership and custody of the collection that are significant for its authenticity, integrity and interpretation

**Notes** - general information about the collection not covered elsewhere


## *Lists section - recommended

This section is for adding keywords, mainly about the coverage of the items within the collection.

You add a keyword at a time by clicking "Add" after you enter each term.  **Note you will still need to click "submit" at the end of this section to save the changes you've made**.

**Spatial** - Geographic coverage information about the collection e.g. Country, region; city/town, post-code, geo-coordinates.

**Audience** - The types of people who would be most interested in the collection, or most expected to make use of the collection, e.g. teachers, learners, researchers, local or family historians. It is not compulsory to add to this field if you feel that your collection has a wide appeal.

**Formats** - The types of material in the collection, for example, drawings, paintings, photographs, works on paper

**Other identifiers** – Only use if a collection has another identifier associated with it e.g. an identifying number or code given to the archive/institution/collection or a DOMUS number, enter the name of the ID scheme e.g. DOMUS, and the actual identifier e.g. 12345. You cannot enter an identifier without entering something in the ID scheme field.

**See also** - any related collection(s) or catalogue(s), preferably as a web address (URL).

**Subject** - subjects associated with the collection as well as people connected to it should be added here. Set terms can be found on the UKAT website (http://www.ukat.org.uk/thesaurus/term.php?i=2400) or the Library of Congress website (http://authorities.loc.gov), but this is a free text field so any words and names relating to the collection should be added.

**Type** – The type of items in the collection e.g. Portraits, Miniatures.

**Creators** - People who created the items in the collection, (only the main/most significant creators need be listed)

**Temporal** - The dates the collection covers. Put the range of dates e.g. 1870/1930 if a specific date is not known

## Institution section – optional

This section can be used for identifying the institution which owns the collection and where the collection is located.  Start typing a word in the institution's name and a list will display on the screen.  Click on the institution you want to select.  (If the institution you wish to add does not appear contact culturegrid@collectionstrust.org.uk with details of the institution and it will be added.)

## Searches section – optional

Only use this section if there is information about items from the collection within *Culture Grid*. Click 'add search' when completed.

**Title** – a name for the search

**URL** – the web address of the search results from Culture Grid e.g. http://www.culturegrid.org.uk/search/#!culturegrid;hasThumbnail=true;query=portrait+photograph

**Thumbnail** – browse for a small image to represent the search results (e.g. one of the images from the search results)

## Thumbnail section - optional

This section is for associating a small image with the collection.

Enter a web address (URL) for a small image that represents the collection or institution as a whole e.g. a logo or other image, to ensure that appropriate branding of the collection is shown

## Agents section - optional

This section is for contact details of people or organisations associated with the collection.

More than one agent can be entered by clicking 'add agent'

## Relationships – optional

This section is for details about other collections or publications associated with the collection being described. More than one entry can be made for each field by clicking 'Add'. Note you will still need to click 'submit' at the end of the form to save all changes.

## Metadata Information - optional

This section is for details about the collection-record you have created or edited

# How to edit a record

If you wish to edit a record (e.g. to revise some detail or add more information) click 'submit' near the top of the 'Editor Home' screen – http://www.culturegrid.org.uk/dpp/edit/home.

You will then need to search for the record you wish to edit.

You may search by 'Title' or you can use the drop down list under the search box to search by 'post code' or 'identifier'.

**NOTE: The Title search is case sensitive, so 'Kent' would need to be searched for with a capital 'K'! Also it is always best to put the word you are searching for between percentage signs as that finds the term anywhere in the title e.g. "%Kent%" would find records that have 'Kent University' and 'University of Kent' in the title.**

Click 'submit' to do a search – the results appear beneath the search box.

Click 'View' to display a record more fully and check it is the record you wish to edit. If it is the right record click 'Edit this record' at the bottom of the screen and the form will appear for you to change or add details.

To change details, go to the field(s) you wish to change and simply write in the new details, remembering to click 'submit' at the bottom of the form to save each change you make.

If it is new information you are adding simply go to the correct place in the form, enter your information and click 'submit' to save it.

## Deleting a record

If you wish to delete the whole of a record this can be done by clicking on 'Delete this record' in the edit screens. Deleting records cannot be undone, so you will be prompted to confirm.

**Note** an example record can be seen at: http://www.culturegrid.org.uk/dpp/view/4505372