

TMS 2010 New Features Web Training Outline

Prepared by Annie Van Assche, TMS Application Trainer, Gallery Systems
anniev@gallerysystems.com

General User Interface

1. Windows Resizing: Can resize TMS; can easily navigate between multiple applications.
2. Main Menu Redesign
 - New module icons added
 - New web interface (dbconfig setting for URL)
3. Tool Bars
 - New tool bars added to the List, List w/Images, Lightbox, and Label Copy display modes, Location and Movement assistant, and several Registration topics, for more consistent and flexible navigation.
 - Hierarchy display mode access increased to include List, List w/Images, Lightbox, and Label Copy display mode screens.
4. Light Box Display: TMS 2010 automatically optimizes the number of images that display on the Lightbox screen, based on your monitor's size. Can display 12, 24, 36, or 48 images on one screen, etc.
5. Listview Thumbnail Image Display Option: Can choose to display or hide the thumbnail (thus optimizing data display).
6. Tab order has been improved throughout.
7. Drag-and-Drop:
 - Can easily link a Media record (and a digital file) by dragging and dropping the file (from outside of TMS) onto a Media card in any record (any module) in TMS.
 - Can drag and drop HTML context, from a website directly into the Text Entries field.
 - Can drag-and-drop objects, from an Exhibition Objects list to a Loan Objects list, etc. (will look at in Exhibitions)

Object Management

8. Locations
 - Locations Authority now organized under two umbrella categories:
 - Internal (your storage units, galleries, in-house photo or conservation lab, etc.)
 - External (Venues, Lenders, Borrowers, etc.)

- Locations Authority now has 7 levels:
 - Internal or External
 - Constituent Name and Address
 - Site
 - Sub-Site
 - Unit Type
 - Unit Number
 - Unit Position
- Can batch add new locations: Quickly add a range of sites, sub-sites, and units (via 'Add Multiple Sites' feature) to quickly construct your location hierarchy.
- Can search on Locations in Locations Authority.

Move Transactions

- Can easily manage the movement of related objects (with multiple object records) via the new 'co-located objects' feature; helps to assure that all related objects will be moved together (i.e., not left behind).
- Shipping record Receipt Number (new field in Shipping) displays in the Object record's Location History.
- When moving objects w/multiple components, can 'select by location,' providing you the means by which to organize components/location, during a move transaction.

9. Crate Utility

- Improved container management; Crate Utility added to Objects Authorities menu for easier access.

10. Object Jurisdiction

- Can easily identify the objects for which your institution is currently responsible.
- These may include '*accessioned objects*,' Incoming Loan objects (currently on your premises), and other objects that you specify as being '*in [your] jurisdiction*.'
- "Accessioned Objects" have the '*In Jurisdiction*' box checked, by default.
- When Incoming Loan objects are moved to an Internal Location, they are automatically marked as being '*In Jurisdiction*.' When they move to an External Location, the '*In Jurisdiction*' status is removed.

11. Object Valuation

- Redesigned valuation control; additional fields added.
- New 'Obsolete Currency' function manages valuations in discontinued currencies such as Italian lire (those currencies replaced by the Euro, etc.). [Maintenance>Authorities>Currencies]
- Reports menu added to Valuation screen.

- Can hide or display valuations added in 'other' modules.
- Can LOCK a value (cannot be edited by any users).
- Can track 'risk adjustment percentage. (diff. between two appraisals).

12. Separable Objects:

- Can indicate that an object is 'separable' (as opposed to 'inseparable').
- New icon appears above Grp Info field for separable objects.
- TMS 2010 has 3 object associations: (1) 'separable,' (2) 'not separable,' and (3) 'inseparable.'

13. Inseparable Objects:

- Technically, NOT associated w/object association (not added to Obj. Association authority)
- Can catalogue related object records as being 'inseparable,' as one entity (canvas painted on one side; drawing on other side; the recto/verso of a two-sided print; the obverse and reverse faces of a medallion/coin), etc.
- Can manage obj. components and location/movement info within the 'physical parent' record; this info is applied to all objects in the group that are linked as 'inseparable.'
- 'intellectual children' are always 'co-located' with the 'physical parent'; helps to avoid unintentionally leaving behind one sheet of a 100-sheet portfolio (when moving the entire portfolio), for example.

14. Rights and Reproductions

- Can link constituents related to the object's 'ownership rights'
- Can define Con Xref role(s) (copyright holder, legal representative, designated printer, rights agency, etc.).

15. Object Bibliography Link

- Can link Bibliography records directly to an Object record (from within the Object record).

16. Attributions (current and historical)

- Can track the current and historical attributions for an object via the new 'Attributions Label' feature on ConXref Assistant screen.
- Can describe complex, multiple-maker relationships for object constituents: "*In the style of John Mix Stanley,*" "*Laurent Cars after Antoine Watteau,*" "*American School after Gilbert Stuart,*" "*Copy after Michelangelo,*" "Formerly attributed to..." etc.
- Displays in ConXref window.

17. Accessioning

- Can better track ‘partial accessioning’ of objects (new % ownership field).
- Enhanced valuation control added to ‘Accession Value’ feature.

Constituents Management

18. Constituent Packages

- Can group, rank, and save lists of constituents via a Constituent Package.
- Constituent Packages has all of the same features as Object Packages; give the package a name, save it, share the package among users, or mark the package @ ‘private’ etc.
- Constituent Packages to group artists of the same school, or consortium groups.

19. Constituent Anonymity

- Can mark an (a) Acquisition-related, (b) Ex-collection related, and (c) Incoming Loan-related constituent as being ‘anonymous’ (i.e., individual or organization has requested to remain anonymous).
- Anonymity can be managed at the user and the departmental levels; specific users can be granted the rights to view anonymous constituent info. associated with one department but not in another department.

20. Alternate Constituent Names

- While linking a constituent to a record in another module, you can choose the appropriate name (and role) for each linking instance.
- When linking an artist’s Constituent record with the role of ‘donor,’ can choose to not display the ‘bio’ string (nationality, birth/death dates) via ‘Alternate Names’ feature.
- For contacts at museums/institutions/corporations, can now track all of the individual contact constituent info. in one Constituent record (via Alternate Names).

21. Constituent Addresses

- Select the appropriate address (Exhib. Venues and Shipping) for the event; pick from a drop-down list of addresses to assign the appropriate address for each use.

22. Enhanced Constituent Searching

- **Keyfields** on ‘Find Constituent’ screen now designed to search via *equals*, *starts with*, and *contains*.

23. New “Private Collector” checkbox on Constituent data entry screen.

Media Management

- 24. Can drag-and-drop a digital file (image, video, audio, document, etc.) from outside of TMS onto a Media card (in any record) in TMS.

25. New Media icons - new icons for non-image media added to db (ex., MSWord icon, Adobe pdf icon, etc.
26. TMS 2010 uses external media players for video, audio, etc. (instead of internal). User can 'register' the various external players in Windows.

Exhibition Management

27. Integrated User Interface (tree hierarchy)

- Exhibition, Exhibition Objects, Venue Constituents, Loans, Loan Objects, and Shipping information displays in one tree hierarchy on left side of main screen.
- Highlight a node in the tree to view info. (to the right); a List View or Data Entry cards display to the right.
- Tree has various right-click menus, depending on what is highlighted.
- "Find" feature simplifies navigating between lists of objects in the tree.

28. Contextual List Views

- There are many new List Views in TMS 2010 (Venues, Venue Objects, Exhibition Objects, Loans, Incoming Loans, Outgoing Loans, Shipments).
- Can export data to Excel (or other applications) from any List View in an Exhibition record.
- Some List Views have active checkboxes (e.g., ExhibObj>Venues and Notes card).

29. Exhibition Dashboard (upper right Data View, exhibition data entry screen)

- There are many new Data Views in TMS 2010.
- Can get vital summary statistics and statuses at a glance for an exhibition -- venue names, vital display dates, and object counts/venue.
- Data View can be customized to meet your specific display/reporting needs (in List View Designer).
- Can print and copy Data Views.

30. Exhibition Record Data Security: Can manage granular security access (per user) to Exhibition records via Exhibition Departments.

31. Can link Bibliography to Exhibitions now.

32. Drag and Drop Objects (in Exhibition record)

- Can batch drag-and-drop objects, from Loan Objects to Exhibition Objects and/or Venue Objects (or vice versa).
- Defaults IIR settings for drag-and-dropped objects copy over to objects in 'new' context.

33. Venues

- Many new data entry fields added.
- Can easily recalculate related loan dates, when venue dates are changed ('Update Related Dates' button in Venue record).
- Can display (or not display) multiple locations for a venue. [think Guggenheim]
- Can track venue statuses (field added).
- Can drag and drop venue objects, from 'Included' to 'Excluded' (and vice versa).
- Integrated List View offers venue checklist for each object with Multiple-Column sorting for in-depth reporting (Exhib. Object>Venue and Notes card).

34. Insurance and Indemnification (IIR)

- Track who is responsible for insurance/indemnification to/from ea. venue.
- Tracked at the Venue, Exhibition Object, and Loan Object levels.
- Can manage insurance limits and indemnification to match the requirements of each exhibition
- Avoids over-coverage (insurance) or duplicate coverage.

35. Overlapping Commitment: You get a warning message when Exhibition Objects have a date conflict with another exhibition, venue, or loan (helps to avoid double-booking an object for multiple commitments).

36. Object Tombstone information (6 fields) can be tracked at the Exhib. record level:

- ExhibObj. Title (+ can define default Type in dbconfig)
- ExhibObj. Credit Line
- ExhibObj. Attribution
- ExhibObj. Dimensions
- ExhibObj. Display Date
- ExhibObj. Medium
- The data in these fields can be edited in the Exhibition record.
- Newly edited ExhibObj. Title and ExhibObj. Attribution also displays in Object record.

37. Extra Exhibition fields: Three additional fields can be labeled and used for whatever (e.g., *main lender's number*, *object checklist sequence number*, etc.).

38. Many additional data entry fields added to Venues, Exhibition Objects, and Loan Objects.

39. Exhibition ID now displays in Exhibition record.

40. Object Valuations (Exhib Loans)

- Can track the insurance value for each object at the Loan record level (from w/in an Exhibition record).
- Can view all valuations thus far added to each specific object record, and pick the appropriate value for the loan record.
- Can edit existing Obj values for Loan Objects.
- Can update Obj values based on currency exchange rates and inflation rates (to keep Loan record total valuations in synch with current global economic changes).

Loan Management

41. Many new data tracking enhancements in Loan record

- Loans Dashboard: New interface display provides vital stats/statuses at a glance; can customize in List View Designer.
- Track all dates associated w/Loan -- original dates, renewal dates, etc; qualify date as being pending, approximate, etc. [Update Related dDates]
- Track the overall status of a loan.
- Object Loan Class (*Object record, Other card*) now displays in Loan record.
- Improved multiple fee tracking, payment status, etc.

42. Loan Record Data Security: Can manage granular security access (per user) to Loan records via Loan Departments.

43. Track special loan needs/requirements - *lender's requirements/requests, photo requests, courier requirements, etc.*

44. Object Valuations (Loans)

- Can track the insurance value for each object in Loan record.
- Can view all valuations thus far added to each specific object record, and pick the appropriate value for the Loan record.
- Can edit existing Obj values for Loan Objects.
- Can update Obj values based on currency exchange rates and inflation rates (to keep Loan record total valuations in synch with current global economic changes).

New Fields and Field Enhancements

45. Flex Fields (aka 'User-Defined Fields')

- Besides Objects (on 'Other' card), Flex Fields are available in Exhibition Objects (Venues and Notes + Statuses cards) and Loans (Insur/Indemnity card).

- Allows you to better track exhibition project workflows.
- Flex Fields can be check-boxes, drop-down lists, or free-text fields.
- Can group Flex Fields together (based on list of tasks/workflow), and assign dependencies.
- Can configure a field (or a field group) to automatically display in all records.
- New 'Advanced Query' search feature for searching on Flex Field data.

46. HTML Text Entries Field

- Field is compatible with HTML Markup Support.
- Can format text to create bold, underline, or italic fonts.
- Can insert HTML text created in any external editor.
- Can drag-and-drop (i.e., copy/paste) webpage context directly into Text Entry field; copies images + hyperlinks w/text, etc.
- Field is fully Unicode compliant; can enter Greek, Chinese, Hebrew, or any other Unicode text/symbols into Text Entries field.

47. Unicode field searching

- Can search on data entered in any Unicode field (in TMS 2010).

Reporting Improvements

48. Crystal Reports

- LOTS of new 'canned' Crystal Reports (over 100).
- Report Design: Clean.
- Report Security: Can manage access to data provided in Public Reports per new 'Report Groups' feature.
- Report Groups: Can organize reports into manageable groups.
- Reports are Anonymity-Aware: All new TMS 2010 reports are designed to honor anonymity requests from donors, previous owners, and lenders.
- Users only see the information they have permission to see (via Constituent Anonymity Rights in Configuration).
- Native Crystal Reports Parameter: TMS now supports dynamic, static, free text and drop-down parameter controls in Crystal Reports; you have greater flexibility when creating reports (can design reports to appear exactly how you want them to appear).
- Report Header: Can add your institution's logo to any report; must set the path to your logo 'image' file in Configuration.

49. Can load/organize Conservation reports in each module (Objects, Media, Bibliography, Sites).

System Administration Management

50. SA Rights:

- No longer need SA rights on server (and in TMS) for access to Dimensions authority.
- TMS admin can now view/has access to all Object Packages (incl. 'Locked' packages).

51. Security: Can manage access to Data Views (on Label Copy screens, and here and there throughout Exhibitions record) per security group and/or specific user(s).

52. Max. character limit increased in several fields (Obj.Title, ObjTitle Remarks, several short-text fields, etc).

53. DBconfig enhancements

- Can lock calculated shipments.
- Can grant/deny right to maintain anonymity for roles.
- Can grant/deny right to maintain report groups.
- Can define default Title Type for 'ExhibObj. Titles.'
- Can add path to institutional logo image file (for reports).
- Can add path to reports header image file (for reports).
- Must add default file path for drag-and-dropped media (Media card)
- Can display (or hide) venue locations card.