– HOW TO CREATE A NEW EXHIBITION RECORD IN TMS –
INSTRUCTIONS & STYLE GUIDE
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EXHIBITION DATA ENTRY IN THE OBJECTS MODULE

Create a new Exhibition

1) Navigate to Exhibitions Module.

2a) Select New Entry from the Exhibitions Query screen.
Or,
2b) if you are already in the module, click on File > New > Exhibition.

3) You may select an Object Package to populate your exhibition now, or add objects/object package later.

4) Complete this Basic Exhibition Info in the pop-up window and click next:

All of these fields are REQUIRED!

Verify that the Exhibition Record has not been created by someone else:

1) From the first Query screen in the Exhibitions Module, choose Query Assistant and click Next.
From the Select Search Field screen, choose Exhibition Title and click Next.
Enter a key word from your exhibition's title; choose the radio buttons to match 'at least one word' and 'match using approximate term'.
2) If no results are returned, you are free to create a new record for your exhibition. If results are returned, please scroll through them to check for existing records.

*** EXHIBITION TITLE**

Titles are assigned when first creating a new record. Change the title of an exhibition record by editing the Exhibition Title field on the General tab of the exhibition record. The title will be updated when the record is saved.

STYLE NOTE: Exhibition titles should be full and proper titles, and contain no abbreviations. Standard capitalization for English titles and foreign language titles (using that language's standards for capitalization; check the Chicago Manual of Style for reference, but in general the romance languages capitalize only the first word).

Rules for exhibition titles:

- Include leading articles or prepositions (i.e. The, An, Les, Le, In)
- Exclude quotation marks [implications for sorting]
- Spell out numbers and dates (i.e. Nineteenth Century)
- If there is a foreign language exhibition title or subtitle, include in parentheses after the title.

Examples:

Botanical Delights
A Day at the Races: Degas, Manet and Images of the Horse
Paolo Veronese: Versatile Master of Renaissance Venice
Nineteenth Century Masterpieces from the Walters Art Museum
Dei ed Eroi: Classicità e mito fra '800 e '900 (Gods and Heroes)

*** BEGIN & END DATES**

*** EXHIBITION MNEMONIC WILL AUTO-POPULATE**

*** DEPARTMENT**

COMPLETE THE DATA ENTRY ASSOCIATED WITH THE NEW EXHIBITION RECORD.
Fields marked with an asterisk (*) are required.

EXHIBITION NODE

When you select the main Exhibition Node on the left, you are presented with data entry tabs and fields on the right.

The static area at the top of the exhibition record shows the exhibition mnemonic and a summary table of the approved venues, dates and objects included in the exhibition.

GENERAL TAB

*** Exhibition Title**

See above for data entry guidelines.

SubTitle

Use this field for extended subtitles, or translations of foreign titles.

*** Exhibition-Related Constituents**

Important people or institutions must be linked to the exhibition record. Choose existing constituents whenever possible. The following roles are appropriate to link. You only need to add a constituent once, use their highest role.

Borrower	Lender
Conservator	Marketing
Contact	Project Manager
Curator	Organizer
Development	Unknown Role
Educator	Venue
Exhibition Designer	

Venues should also be linked on the Venue Tab. Some roles like Borrower and Lender will duplicate people or institutions linked to related loans.

NOTE: Select the name that identifies the institution *at the time of the exhibition*. Alternate names are available in the Name field. (Example: for exhibitions at the Walters before 2001, select "The Walters Art Gallery"). If the name is not available, add it in the constituent record as an alternate name or former name.

*** Exhibition Begin Date & Exhibition End Dates:**

Enter the exhibition's begin and end dates using the calendar picker. If you are missing the month, type in the year only (do not use the calendar picker). If you are missing the day, type in the month and year only (do not use the calendar picker).

*** Display Date**

Enter the exhibition's begin and end dates in the format: **Month Day, Year-Month Day, Year**
STYLE NOTE: Do not abbreviate months. Do not enter spaces around the hyphen.

January 30, 2010-January 2, 2011
September 16, 2009-August 15, 2010

If the exhibition has multiple venues, enter the begin date at the first venue and the end date at the last venue.

If you are missing part of the date, omit the missing part from both the begin and end dates.

Correct:	1974-1975
Correct:	January 2001-June 2002
Incorrect:	January 21, 2001-2002
Incorrect:	June 2005-January 10, 2006

Search Dates will populate automatically. Please verify that TMS interprets the start and end year of the exhibition correctly from your display date.

Remarks

This field contains miscellaneous information and is not widely in use.

*** Department**

Select the curatorial department that is organizing the exhibition, or the department that best reflects the genre of the exhibition. If there is no appropriate match, choose Special Exhibitions from the drop-down.

*** Exhibition Mnemonic**

The Exhibition Mnemonic field will auto-populate when you are creating a new exhibition record. If the title of the exhibition is subsequently changed, the exhibition mnemonic field will have to be *manually* updated. This field should contain the exhibition title in all capitals with no spaces. There is a character limit, do not be concerned if your mnemonic title is truncated. The purpose of this field is being evaluated at this time.

Exhibition Title:	William Birch: Picturing the American Scene
Exhibition Mnemonic:	WILLIAMBIRCH:PICTURINGTHEAMERICA

NOTE: This field does not update when you copy an exhibition, or change an exhibition title in the Title field. It must be manually entered, or it will remain as the exhibition mnemonic of the copied exhibition, or previous title.

Installation Date

Installation period at WAM.

Next ExhObj Number (auto assigned)

Auto-assigned when objects are added to the exhibition.

*** Exhibition type/Public Information checkboxes**

Designate the exhibition type by clicking in the appropriate checkbox. You may select more than one if applicable.

Outgoing Loan Only (Non-WAM Exhibition) – Check for outgoing loans of WAM objects for purpose of exhibition.

Active on Schedule – Check for exhibitions which should appear on "WAM Long-Range Project Schedule" report.

Is Virtual - Check for exhibitions which are virtual.

Is Online/Public Access - Check this box after an exhibition record has been fully vetted, catalogued and completed. This checkbox will signify that a record can be published online.

DOCUMENTATION TAB

NOTE: Text entered in the Credit Line fields in the Documentation section will appear with the Exhibition Title and date when the Exhibition node is selected.

Exhibition Public Description

Enter description of exhibition. This field may one day appear online.

Long-Range Schedule Notes

Notes which will appear on "WAM Long-Range Project Schedule"

In-house Location

For use with exhibitions which are displayed at WAM. Appears on "WAM Long-Range Project Schedule" report.

Sponsor Credit Line

Not in use at this time, do not populate

Estimate Attendance & Actual Attendance

Not in use at this time, do not populate.

Entrance Fee

Not in use at this time, do not populate.

Definable Object Field Labels

These are reference fields that can be adjusted per exhibition. Do not populate unless instructed by TMS Administrator or Exhibition Registrar

INDEMINITY TAB

Indemnity

To be used by Registrar's office. Not in use at this time

Statuses

Statuses are custom Thesaurus terms that are used to catalog records. These fields are presently used to store Exhibition Tasks that were converted pre-TMS. Statuses are not currently in use, do not populate.

***Attributes**

Attributes are custom Thesaurus terms that are used to catalog records. The following attributes need to be added to each exhibition record.

<u>Cataloguing</u> (used for tracking exhibition cataloguing for the NEA grant project)

Choose Add > Choose Attribution Type = Cataloguing

Choose Browse… > Double-click on appropriate term the left hand navigation pane (terms have key icons).

Terms:

Missing Objects: use to indicate that there are WAM objects missing from the exhibition

Missing Venues: use to indicate that there are venues missing from the exhibition

Not present on Comprehensive Exhibitions List: use to indicate that this exhibition does not appear on our Comprehensive Exhibitions List document maintained by the Exhibitions Department here at WAM.

Present on Comprehensive Exhibitions List: use to indicate that this exhibition does appear on our Comprehensive Exhibitions List document

Irresolvable Objects from Checklist: use to indicate that the paper documentation/checklist used to catalog this exhibition had unknown objects on it

COMPLETE: use to indicate that exhibition record is complete with venues, objects, bibliographic information (where applicable) and all sources have been consulted to flesh out the record.

*NOTES TAB

Registration Notes

This field houses data that was converted pre-TMS. The contents, if any, of this field can be reassigned across the appropriate tabs of the exhibition record and its contents can be deleted.

Other Notes Fields

These fields house either converted data or miscellaneous notes. Their contents should be reviewed and relevant information should be reassigned to the appropriate fields in the exhibition record. These fields are not currently in use.

Text Entries

In use to track changes to the exhibition checklist.

For all Text Entries:

Enter date, author of change, enter note in Edit Text field
Format example: Removed from WAM venue: object number; Removed from checklist: object number, object number).

Text Entries defined:

Checklist changes: use to document objects which have been added or removed from checklist or venues.
Layout or Placement Changes: use to record when an object has moved from one section or case on the checklist.
Notes: use for general notes about an exhibition
Object information updated: use to record when object information has been updated in the objects module
Press Release:
Venue Notes: use to record information related to exhibition venue.

MEDIA TAB

Not in use.

BIBLIOGRAPHY TAB

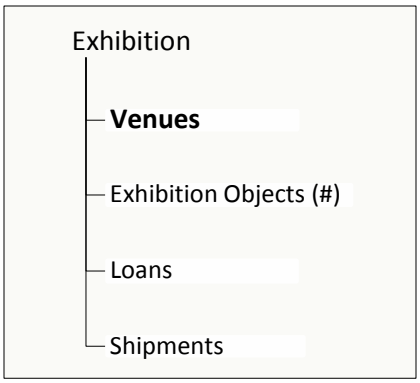
Link an exhibition's catalogue record by clicking "Add" and locating the bibliography record.

<ENTER INFORMATION INTO THE OTHER NODES>

VENUES, EXHIBITION OBJECTS, LOANS, SHIPMENTS

An exhibition is broken down into **nodes** on the left side of the screen. To add information to any of the nodes, right click on the node and an "add" item will appear to allow you to add information.

***VENUES node**



*** GENERAL TAB**

To add a venue, right-click on the Venue node and highlight "Add Venue" and follow the prompts in the dialog box.

STYLE NOTE 1: Each exhibition must have at least one venue. If the exhibition is at the Walters and not traveling, enter the Walters as a venue and list the dates equal to the entire exhibition dates. If there are multiple venues, list them and list their individual exhibition dates.

Check the appropriate venue status box (Approved, Storage Venue, Display Venue Name + Mnemonic).

The Display Venue Name + Mnemonic checkbox allows you to enter a sub-heading or qualifier for the venue (i.e. Rotation 1 or Temporary) into the Mnemonic field and have it appear on reports and checklists. This is very useful when assigning different rotations at the same venue.

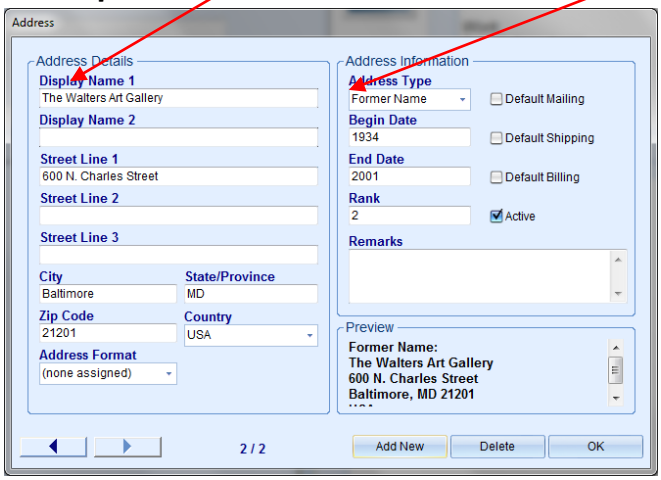
Approved venues will appear in the static area at the top of the exhibition record with the exhibition dates. To change the order of the venues in the table, right-click on the venue name in the Venues node > Order > select 'first,' 'next,' 'previous,' or 'last.' Save the exhibition record to view the changes.

STYLE NOTE 2:

1) Each venue must have a default mailing address selected from the venue address dropdown list. If no address is listed, add one in the constituent record.

2) For venues that have changed names (i.e. The Walters Art Gallery > The Walters Art Museum), select the name of the institution at the time of the exhibition. The *former name* of the institution must be included in the constituent record in Display Name 1. In Address Type, select Former Name.

[from Constituent module]:



Venue Objects
- **Included (#)**
- **Excluded (#)**

Exhibition
- Venues
- **Exhibition Objects (#)**
- Loans
- Shipments

Then, in the exhibition record, venue tab, you can select that name/address in the Venue Address field, and type it in the Venue Mnemonic field.

VENUE STATUS TAB

Not in use.

INSURANCE/INDEMNITY TAB

Not in use.

*VENUE OBJECTS SUB-NODE

Expanding a venue's node will show you the objects included in the exhibition at that location. Leave all objects in the Included node if a checklist for each venue is not available or there is no documentation to suggest which objects did not travel to which venues. Objects can be Excluded from Venues on the Venue node that they did not travel to. To exclude objects from venues, click on the "venue object"' node within the venue. A list of the objects will appear at the right. Highlight the objects to be excluded and drag them to the "excluded" node.

*EXHIBITION OBJECTS NODE

Selecting the Exhibition Objects node will display a list of ALL objects related to the exhibition. Selecting an individual object will display information about the object as it relates to the exhibition. Information on this node is entered on the object level, meaning each object linked to the exhibition has its own set of fields; however, **most data entry about the object as it pertains to the exhibition is entered in the Objects Module. See Appendix A of this document for information.**

***Exhibition Objects**

Objects are a required component of a complete exhibition record.

Right-click on the Objects node to add objects or an object package to an exhibition record. This action creates links to existing object records (it does not create the actual object record). To remove an object from an exhibition, right-click on the object and select "remove object."

Link all Walters Collection objects included in the exhibition. Sometimes object records for objects loaned to the exhibition have been created. Where possible, link those objects. You do not need to create object records for loaned objects where none exist. If using TMS to create an exhibition checklist, create object records for all lender objects in the exhibition.

An object package can be added to the exhibition record through the Objects tab. Right-click on the objects node and select Add object> Query Assistant > Object Package Name … {select package from list}

NOTE 1: When adding manuscripts to the objects list, include the folio that was displayed, as well as the parent manuscript record. If no folio record exists, include the parent manuscript record, and enter the folio number in the "Installation Notes" field. Contact the Data Entry Assistant if new records are needed for folios.

NOTE 2: When adding objects or loans to an exhibition be sure to edit the objects list on the venue node to made sure objects were added to the correct venues.

CATALOGING TAB

Information entered in this tab relates to the object that is highlighted in the Exhibition Objects list on the left.

Section /Sub-Section

This field is used to designate the area or component of the exhibition where the object was or will be displayed. Section Format example: 01: section title. Subsection format example: A: subsection title

NOTE: Text entered in these fields creates a 'drop-down-on-the-fly' list for the exhibition. It aids in data-entry when assigning different objects to the same sections and sub-sections.

Case Number

This field can be used to record a unique identifier for an object's case. This is a free-text field and number sequences are not automatically updated.

NOTE: If the number includes a section and case number, include 2 decimal places after the decimal. This is for report sorting purposes. Example: case number 2.1 should be entered as 02.01

Checklist Order

Use to denote placement of object in section, subsection or case on object checklist.

Note: Auto-assigned by TMS. Checklist order number can be edited. Subsequent numbers must be updated manually.

Exhibition Object Number

Catalogue Number

This field stores the figure or illustration number in an associated exhibition catalog.

Use as Exhibition Thumbnail

Select an object that has an image to use as the exhibition thumbnail. When possible, attempt to match the exhibition thumbnail with the graphic identity of the exhibition (i.e. use objects featured in promotional material or on a publication cover).

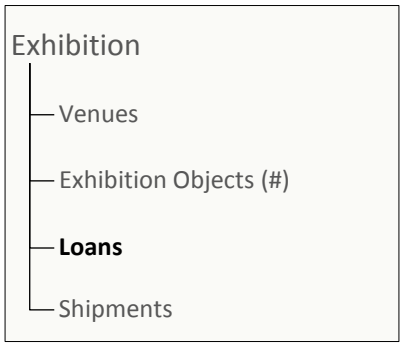
Checklist Notes

This field contains miscellaneous information relating to the exhibition object and design notes that relate to all venues. It can be used to record the folio number(s) displayed in an exhibition if the record(s) do not exist in TMS. The following format should be used to record opening information:

Openings: "opening title", #v-#r (venues); "opening title", #v-#r (venues)

Installation Notes

This field contains miscellaneous information relating to the exhibition object and design notes for related to WAM installation only.



VENUES AND NOTES TAB

Use this tab to view included, approved and displayed checkboxes

Included: if checked object will physically be at the venue

Approved: Object has been approved for venue by exhibition conservator (WAM objects only) or by lender.

Displayed: object will be on view at venue. If not check means object may be in storage at venue.

Flex Fields: Use of Flex Field can be determined for each exhibition, such as Registrar crate information.

INSURANCE TAB

To be determined.

STATUS TAB

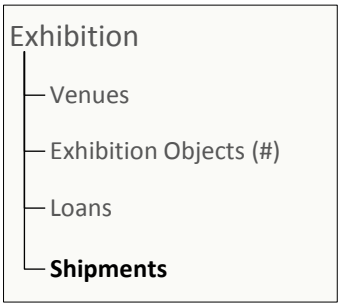
Not in use.

LOANS NODE

Right-click on the Incoming Loan or Outgoing Loan nodes to link existing loan records to an exhibition. Loan links are required where applicable. Special exhibitions where The Walters Art Museum is the only venue and there are no loaned objects from other institutions will likely not have an associated loan record. Exhibitions that pre-date 1995 may not have an associated loan record.

To remove a loan from an exhibition, right-click on the loan in the Loans node and select 'remove.' You will be asked to confirm your choice to remove the loan. Then, you will be asked if you want to remove the loan objects from the exhibition. (Click YES. We have not determined why you would want to leave the objects in the exhibition if the loan is removed from the exhibition).

SHIPMENTS NODE



Right-click on the shipments node to link existing shipment records to the exhibition. This node may be completed by the Registrar's office.

APPENDIX A:

EXHIBITION DATA ENTRY IN THE OBJECTS MODULE

All object level data entry is completed in the object module. This includes changes to title, medium, and dimensions. Please see object style guide for standards.

Conservation requirements, crating and mounts information is also recorded in the objects module on the Notes Tab as a text entry.

Conservation Requirements for display and loan (WAM and other Venues): On Notes Tab, use text entry type: **Loan Conditions**
Enter date and name of conservator, in remarks enter loan number or exhibition title. Enter requirements in the edit text box. Requirements should be in the following format (use function keys for auto-entry):

Temperature: 70 ° F +/- 5° (21° C +/- 3° C)
Relative Humidity: 50% +/-5%
Light Level: not to exceed 15 ft candles
Silica Gel (dry 40%) must be installed in case with airflow to object display area
Silver Cloth must be installed in case with airflow to the object display area
WAM Mount required (deck mount)
Must be installed in case/vitrine

Mount and Cradle information: On Notes Tab, use text entry type: **Mount and Cradle Information**
Enter date and name of conservator registrar or designer, in remarks enter loan number or exhibition title. Enter requirements in the edit text box. Requirements should be in the following format:

Example:
Wall mount
H: 19 11/16 x W: 25 13/16 in. (50 x 65.5 cm)
Example:
Cradle with 10 degree tilt
Example:
New Mount Needed
Deck at 10 degrees

NOTE: Overall Dimensions of object in mount or cradle (use object dimensions format).
NOTE: Field will also be used to track new mounts that need to be made or mounts that exist, which can be used for exhibition.

Handling requirements: On Notes Tab, use text entry type: **Handling Requirements**
Enter date and name of conservator, Art Handler or Registrar, in remarks enter loan number or exhibition title, if applicable. Enter requirements in the edit text box.

Example:
Proper left front corner has old damage; please avoid handling in this area.

<u>Crating Requirements</u>: On Notes Tab, use text entry type: **Crating requirements**
Enter date and name of conservator, in remarks enter loan number or exhibition title. Enter requirements in the edit text box.

Examples:
Cavity pack in tyvek lined cavity.
Object may be packed horizontal or vertical
Wrap object in plastic bag.
Silica gel (50%)
Silver Cloth