

Collection Works User Guide

(DRAFT – 19/11/2020)

Overview

The Collection Works website allows you to store and retrieve information about any collections you may own. These may include CDs, DVDs, books, and much more.

The site is designed to be as customisable as possible, within reason, so that you can store just the information you want and not have to deal with mounds of irrelevant data.

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1. General

1.1. History

The main purpose of the site is to provide a place to store information about your collections, and to easily retrieve any of that information as required. The initial development of this site began in the early 2000s but the entire site was fully overhauled in 2019/20. It all came about out of a desire to have a way to find out if I already owned particular books when I was shopping. I am pleased to say that on many occasions using the first version of my site prevented me from doubling up on purchases.

1.2. Screen size and mobile use

The site has been designed to work on a desktop computer, although it will work on smaller devices also. Further versions of the site may expand the mobile aspect of things. If you use most mobile devices the site will automatically kick you into a cut down version of everything; this will allow you to log on and perform a search and nothing more. As this is all I really want when I am out and about and checking if I already own something it may stay like that for a while as it meets the stated purpose of the site. There is an option to switch to the full site should you wish to.

1.3. Operating system

These instructions are written assuming you are using a Windows PC. If you are using a Mac, or any other device, the specifics of how some pieces work may be slightly different but the overall operation of the site will be the same. An example of something that does behave differently is selecting an option in a list. On a Windows PC any existing selections are cleared when you do this, but on an Android device the new selection is added to the existing selections.

1.4. Time out

The site has a built-in time-out of 30 minutes after which your session on the site will close automatically. This is to prevent unauthorised access to your information. This time out may be reduced in the future.

1.5. Page layout

The screens are all designed to display information in a window that stays the same size. As long as your screen resolution is bigger than the display window on the site you should have no issues.

Almost every page has a status bar at the bottom, with buttons to control the actions you can take underneath. The colour of the status bar, and the text within, is useful in identifying if any problems have occurred. Then the text and status bar are green all is well, when red there were problems, and when purple information is being displayed.

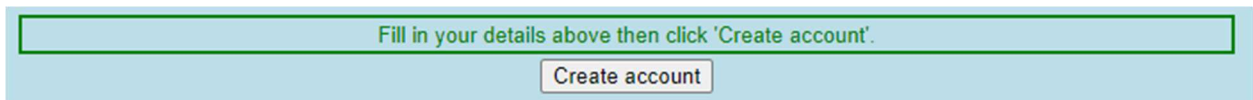


Fig. 1 – Example of status bar

To keep the pages as relevant to the data as possible the information given at the top of each page is kept to a minimum. For detailed information about the purpose of each page read through this manual.

1.6. Errors and messages

Errors will occur within any website no matter how much care is taken in its development. As much as possible this site will report all errors either to yourself, or to the dev team, or both. If you feel that you've discovered a bug please use the contact form, available on the Help menu, to get in touch.

When errors are displayed to you they will either appear in the status bar mentioned above, or they may be shown over the entire display window. The method used depends on the mechanics of the page that you were using when the error occurred. Errors shown in this way are generally – but not always – resolvable by yourself and the messages will give you information on what to try.

When the site encounters an error that you cannot resolve it will send an email to the dev team so they can take the appropriate action. This may mean you're not able to proceed with the changes you wanted to make but the issue will be resolved as soon as possible.

1.7. Help

In addition to this PDF manual help is also available on the site. Much of the information will be the same as given here but in a more concise form. You can access the online help via the Help menu. If you are on a page for which specific help exists when you select the 'Manual (online)' option the help page will jump to the section for the page you were on.

2. Overview of the site mechanics

The site is essentially a big database that you can, within reason, customise how you want.

2.1. Categories

The backbone of the database is categories. These are defined within the site as groups of objects within your collections. You can have as many categories as you like, and each category can have up to two levels of sub-categories associated with it. When you start using the site you will have no

categories at all and one of the first things you must do is create at least one. Without any categories you can do virtually nothing else on the site.

You should put some thought into the categories you create before you start entering data. While you can add, edit, and delete categories at any time, once you've started to enter data it will become harder to make changes to them.

Each item you add to the site can be linked to just one category, but it can be a top, second, or third level category.

Some examples of categories, based on my own collections, are:

Top level category	Second level category	Third level category
Books		
	Novels	
	Non-fiction	
		Large books
		Regular size books
	Graphic Novels	
	Humour	
Visual Media		
	Discs	
		DVD
		Blu-Ray
	Video	

When you look at DVD you can see that its full category set is 'Visual Media – Discs – Blu-Ray'. In this way I can identify just my Blu-Rays, or all my disc-based items, or everything that is visual media.

2.2. Series

Series are optional but it is highly recommended that you make use of them if you want to be able to group things together across multiple categories. A series is the topic, if you like, of a particular item in your collection. Some examples here may be 'Batman', the TV show 'Friends', the 'Evil Dead' movies. These are all series of things where you may own items from multiple categories - books, DVDs, Blu-Rays, but want to keep track of the series each item belongs to.

As with categories a series can have up to two-subcategories, and there are no limits to how many series you can create.

An example from my collection of a series with a sub-series are the 'Shannara' books. I have a main series called 'Shannara' and then a sub-series for each set of books that Terry Brooks wrote. This allows me to find everything I have related to Shannara in one go, or to just find the items related to one of the smaller sets if needed.

Each record you add to the site can be linked to up to three series, although none are mandatory. This feature is useful if you have items that span multiple series. In my collection I have a lot of cross-over graphic novels so I may have an item that is linked to series 'Judge Dredd', 'Alien', and 'Batman'. When I do a search for any of those series that item will show up. The order the series appear in does not matter for the purposes of searching so you can add them in any order.

2.3. Linking series to categories

When you start to add your items on the site you will see the full list of categories from which to select. By default you will also see a full list of all your series, and if you are like me you will have many more series than categories. While you can start typing the letters of the series to find the one you want this can still take a while.

To limit the list of series that you see when adding records you can restrict the series to just the categories they apply to. By doing this, when you are adding items, you will see a much-reduced list of series which can speed up data entry significantly.

While this is not a required thing to do the time it takes to create these links will certainly pay off in the long run.

For an example of using this feature let's say you have categories 'Books', 'Movies', and 'Music', and amongst your series you have 'Asterix'. You know you have books about Asterix but nothing in the other two categories. You would therefore link the Asterix series to the category Books. When you are adding items later Asterix will only appear in the series list when you have selected Books as the category.

You do not need to add the series to any sub-categories, they will automatically be included.

2.4. Fields

When talking about a database a field is a place where you can enter data. Whenever you have signed in to a website and entered your username, for example, the place where you put your name is a field.

Fields are another key item within the site and you must have at least one field defined for each category you use. Fields are one of the most customisable pieces of the site as not all categories require the same information. For example, for a book you may want to store the names of the author(s), but for a CD it would likely be the name(s) of the artists. If you are keeping track of your dresses you may want to know who designed them.

For each category you can utilise up to 10 text based fields, 5 number based fields, and 3 date based fields. These numbers were chosen as they seemed to be sufficient for most purposes.

It is up to you to choose which of the fields to use, and what headings to enter. For books you may choose to use the first three text entries for Author 1, Author 2, and Author 3, the first number field you may designate to record the number of pages, and the first date field as the date you bought the book. For CDs the options may be completely different.

You can only define fields for the top level categories and all sub-categories will inherit the settings.

You do not need to include a field for 'Title' yourself as that is a mandatory field that is set elsewhere within the site.

2.5. Lookups

Using lookups is optional but they will help you tremendously in keeping your data consistent. A lookup consists of a list of data, e.g. authors, who you may want to enter on your items over and over again and do not want to re-type all the time.

You can have an unlimited number of lookups but it is really only worth creating them for those pieces of information which you will be entering a lot of, such as authors, artists, or designers.

A lookup list, once created, is linked to a category and subsequently to the text fields you select within that category. A lookup list can be linked to multiple sets of category and fields.

If we use the example of a category called 'Books', which has fields 'Author 1', 'Author 2', 'Genre', and 'Place Purchased', and a lookup called 'Authors' you would link the lookup to both of the author fields, but not to genre or place purchased. If you had another category for 'Movies' and a field within that category called 'Movie based on book by' you may also choose to link the same Authors lookup to that field. This way when entering data into any of those fields you can select from the list instead of having to type the entire name each time.

Note that lookups can only be linked to text fields.

2.6. Summary

The above gives you an overview of the import pieces of the site and how they link together. There are many pages that provide access to edit all of the settings above, and then to add and manipulate your data and details of all those are given further down this manual.

3. Accessing the site

3.1. Creating an account

Before you can use the site you need to create an account. To create an account choose the Account menu and then 'Sign up'. You will see the page below:

Home Account Help

This page allows you to create an account for the site. Please complete the form below and click 'Create account'. Any problems will be shown and you should correct them before your account will be created.

After you have created your account you will receive an email with a verification link. You must follow that link and sign in before your account will be active and you can fully use the site.

First name :

Last name :


Username :

Password :

Confirm password :

Email address :

Agree to current [terms and conditions](#) :

I'm not a robot  reCAPTCHA
Privacy · Terms

Fill in your details above then click 'Create account'.

Create account

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Fig. 2 – The signup page

To create an account you need to complete the information shown and then click the 'Create account' button. There are some requirements for each of the entries on the page and if any of your entries are outside the requirements you'll get a warning message which will help you correct the entry. An email address can only be associated to one user account so if you happen to share an email address with someone else you'll need to create separate ones before using the site.

It is important to note that you must actually read the terms and conditions before you can accept them. Clicking the link where the words 'terms and conditions' are shown will display the terms and conditions over the top of the screen. The terms and conditions may change from time and when this happens you'll be prompted to accept them again.

To try and prevent automated sign ups to the site a reCAPTCHA is include on the sign up page. This should be pretty unobtrusive to complete.

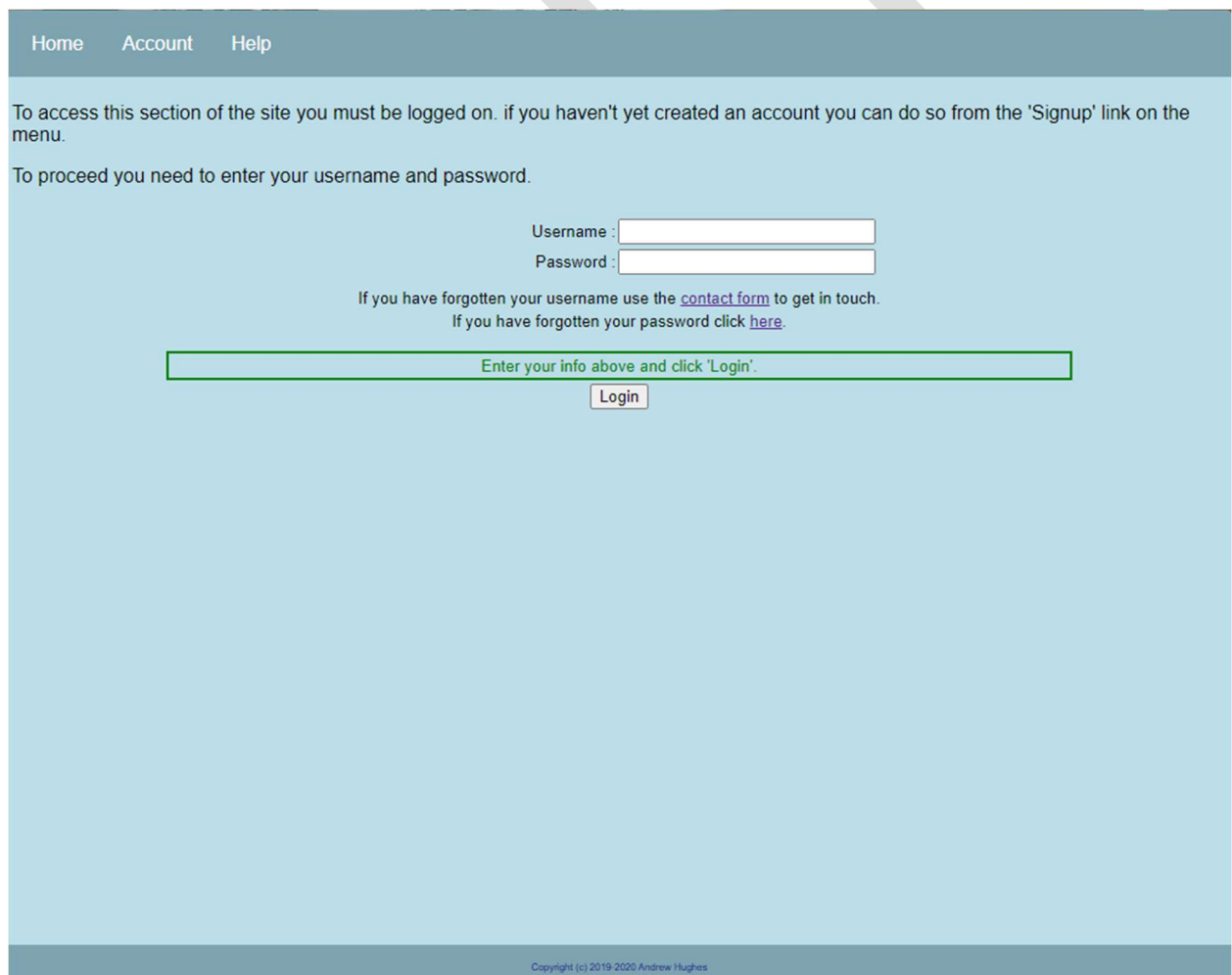
3.2. Verifying your account

Once you have signed up you will receive an email requesting you to verify your account. This is to ensure that you are the user of the email address you entered. Included in the email is a link to a page on the site that you must either click from your email or copy and paste into a web browser. Once the page loads you need to enter your username and password to verify your account. If you don't follow the link correctly, or enter incorrect logon information, your verification will fail. If you fail to verify your account five times your account will be locked out.

Once your account is verified you will be logged on and can access the full site by clicking the 'Home' button from the menu.

3.3. Logging on

If you've already created and verified an account you can simply log in. When you select the 'Log in' option from the 'Account' menu you'll see this page:



The screenshot shows a login page with a dark blue header containing navigation links: Home, Account, and Help. Below the header, there is a light blue background with the following text: "To access this section of the site you must be logged on. if you haven't yet created an account you can do so from the 'Signup' link on the menu." and "To proceed you need to enter your username and password." There are two input fields: "Username :" and "Password :". Below these fields, there are two lines of text: "If you have forgotten your username use the [contact form](#) to get in touch." and "If you have forgotten your password click [here](#)." A green rectangular box highlights the text "Enter your info above and click 'Login'." Below this box is a "Login" button. At the bottom of the page, there is a small copyright notice: "Copyright (c) 2019-2020 Andrew Hughes".

Fig. 3 – Log in page

To log in enter your username and password and click the 'Login' button. Assuming you get your information correct you'll be logged on and taken to the home page.

4. Account information

4.1. Forgotten username

At present the only way to retrieve your account if you have forgotten your username is to use the contact form to get in touch. Once we've established that you are the correct person we'll give you info to access your account again.

4.2. Forgotten password


If you forget your password you can click the link on the log in page and you will be directed to a new page as below.

Home Account Help

If you have forgotten your password enter your username or email below and we'll send you a link.
Note that if any of the information you supply is invalid you will not get an email, nor will you get an error here.

Username :

Email address :

I'm not a robot  reCAPTCHA
Privacy · Terms

Enter your username OR email above and click 'Forgot password'.

Forgot password

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Fig. 4 – Forgotten password page

To reset your password you need to enter either your username, or your email address, and complete the reCAPTCHA (again added to prevent automated attempts at resets), then click the 'Forgot password' button.

Assuming that the info you entered exists you will shortly receive an email with a link. You should either click the link, or copy and paste it into your browser, then you can select a new password to use. The link in the email can only be used once, and it will expire two hours after the email is sent. If you are not able to complete the password reset within that time you will need to request to reset it again.

IMPORTANT – If someone compromises your email account you must get in touch as soon as possible. If someone has access to your email address they could reset your password as they will receive the password reset notification. This issue is not limited to just the Collection Works site so you should be vigilant any time you think someone may have access to your email.

4.3. Update account

Once you have signed in you can make changes to some of your account information. You can select this option from the Account menu. When you do this you'll see a page similar to that below.

Fig. 5 – Change account page

Your username and your email address will both be shown on the screen in the relevant places. You have the option to change either of those items, or your password. You can choose to change all of them if you wish. The entries you make have the same requirements as when you first created your account. Any problems will be shown on the screen.

As with other pages there is a reCAPTCHA shown to prevent any automated attempts at completing the form.

4.4. Delete your account

If you no longer want to use the site anymore you have the option to fully delete your account. This is an irreversible option and will remove all your data and images. If you are absolutely sure that you wish to remove your account simply click the confirmation checkbox, complete the reCAPTCHA, and click 'Delete account'. There are no further warnings. Note that the process may take a short amount of time to complete and to ensure full removal you should wait for the confirmation message that the process is complete before opening a new website or closing your browser window.

5. Setting up your data

As mentioned in an earlier section of this manual, regarding how the site mechanics work, there are several things that you must, or should, set up in order to fully use the site. Each of the pages associated with these are items are described below.

5.1. Categories

Categories are the backbone of the site and is something that you absolutely must create at least one of. The categories page looks like the image below, although when you first load it there will be no categories shown. Initially the options shown to the right will only allow you to add a new category, but after you add at least one category you will have the options to edit and delete as well.

As you add categories you will notice that all top level categories are shown on the left, second level categories are slightly indented, and third level categories are indented even further. They are also colour coded in slightly different shades of purple.

There is an option to import a list of categories directly into the system. Depending on how many categories you wish to enter this may be a quicker method of adding them.

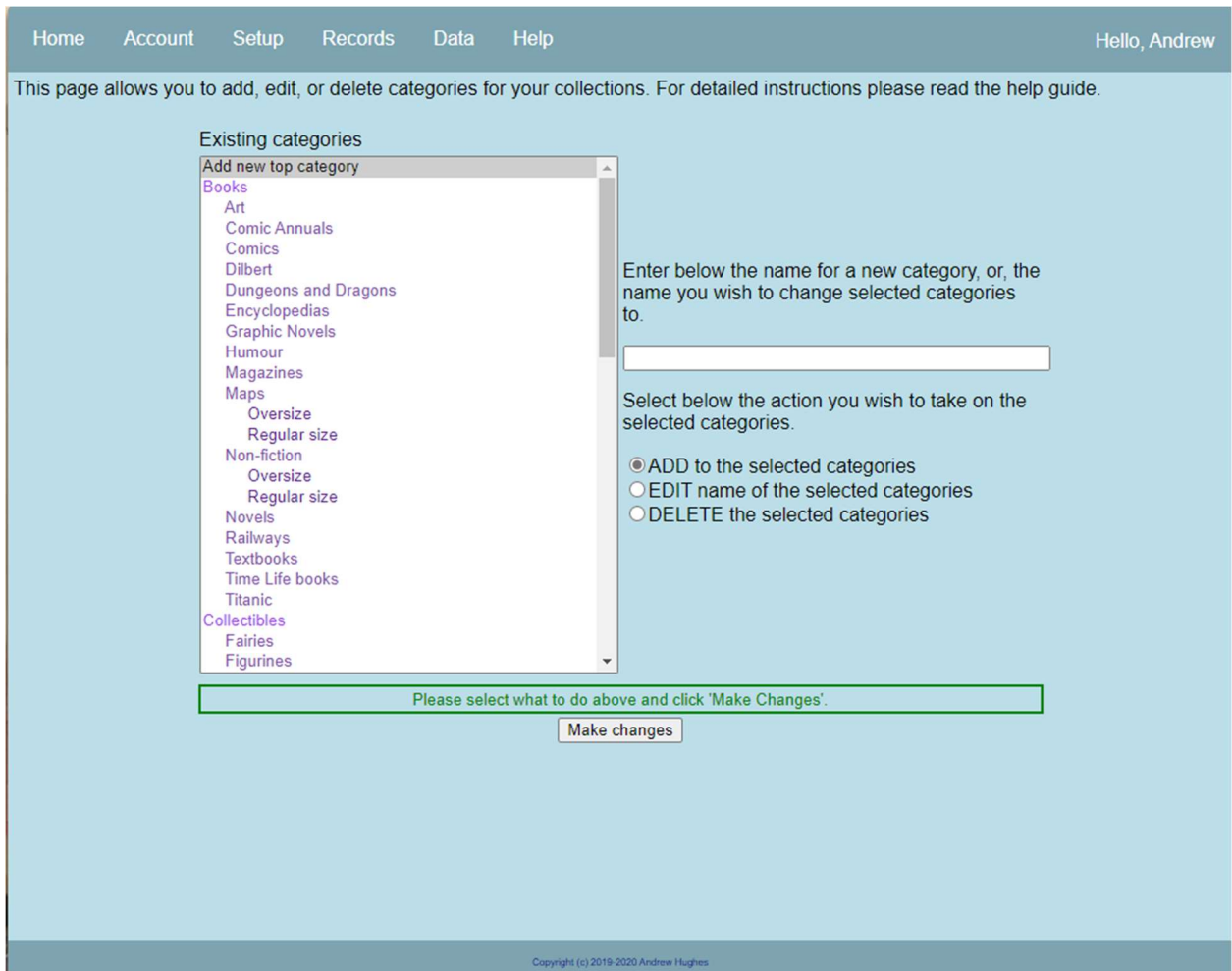


Fig. 6 – Category page

You should note that you cannot edit or delete the entry at the very top of the list; this is a permanent placeholder to ensure you can always add a new top level category.

5.1.1. Adding categories

To create a new top level category select the top entry, 'Add new top category', then in the space to the right enter the name of your new category. The category name should be alphanumeric, that means it can include letters and numbers and a few other characters, up to a maximum of 25 characters. Any problems with the format will be displayed. Make sure you have selected the option to 'ADD' and then click the 'Make changes' button. Assuming all works correctly your new category will be created and the list of existing categories will be refreshed to include your new entry.

If you wish to create a second or third level category select the category that will be the 'parent' for the new category, enter the new category name in the space to the right, ensure 'ADD' is selected and click 'Make changes'. Again the list will refresh to include your new category.

At each level of the category tree the name entered must be unique. This means that you can only have one top level category called 'Books', but, you could add 'Books' as a second level category under all your top level categories. If you try to add a category name at any level where it already exists you will see an error.

If you want to add the new category to multiple places at once you can do so by selecting all the places the new category should be added to, entering the new name, and then clicking 'Make changes'. If you happened to have top level categories named 'DVDs', 'Blu-rays', and 'Movies' and to each of those you wanted to add a category called 'Westerns', you would select all three of those top level categories, enter Westerns in the space to the right, and click 'Make changes'.

5.1.2. Editing categories

If you make a spelling mistake with any of your categories you can change its name. To do this select the exact category you wish to change. When you do this its name will appear in the space to the right. Edit the name to what you now want it to be, select the option to 'EDIT', then click 'Make changes'. If all is well the list of categories will refresh to include your change.

Note that you cannot change the name of a category to the name of an existing category in the same position.

You also have the option to change multiple names at once. If you had added a category 'Westrns' to several of your other categories the quickest way to fix this is to select all the misspelled categories, enter 'Westerns' into the space on the right, then click 'Make changes'.

If any problems occur while the changes being made they will be displayed. It is important to note that changes are processed in order so it is very possible that some of your changes may take effect but others, that caused errors, will not.

The site doesn't really care about the case of your entries, so if you have a category called 'WEsterns' but it should be 'Westerns' you cannot directly edit it, as the site will think it is already the same thing. The way to solve that problem is to change it first to 'Wasterns', then immediately re-edit it to 'Westerns'.

5.1.3. Deleting categories

The final option you have for categories is to delete them. This is an irreversible process and while it will not cause any data associated with your item records to be deleted it may cause them to lose their category information. Even though you can re-add a category with the same name the internals of the site will not know it is the same and so the links to your item records are permanently broken.

You can select to delete just one category, or, you can select many at the same time. When you select a category that has any sub-level categories all of those will automatically be deleted, you do not need to select them individually.

Once you have selected the category/categories you want to delete select the 'DELETE' radio button. When you do this an extra option will appear underneath the 'DELETE' line with a checkbox that you must also tick to confirm you want to delete the records. This is to avoid you mistakenly deleting information. Once you are sure you have the right entries selected click the 'Make changes' button and those categories will be deleted.

After each deletion the confirmation checkbox will be reset to blank so that you cannot simply click 'Make changes' over and over and mistakenly delete a lot of information.

5.2. Series

Series are an optional part of the site but are invaluable for making logical groups of items that may spread across multiple categories. The series page looks like the image below, although when you first load it there will be no series shown. Initially the options shown to the right will only allow you to add a new series, but after you add at least one category you will have the options to edit and delete as well.

As you add series you will notice that all top level series are shown on the left, second level series are slightly indented, and third level series are indented even further. They are also colour coded in slightly different shades of purple.

There is an option to import a list of series directly into the system. Depending on how many series you wish to enter this may be a quicker method of adding them.

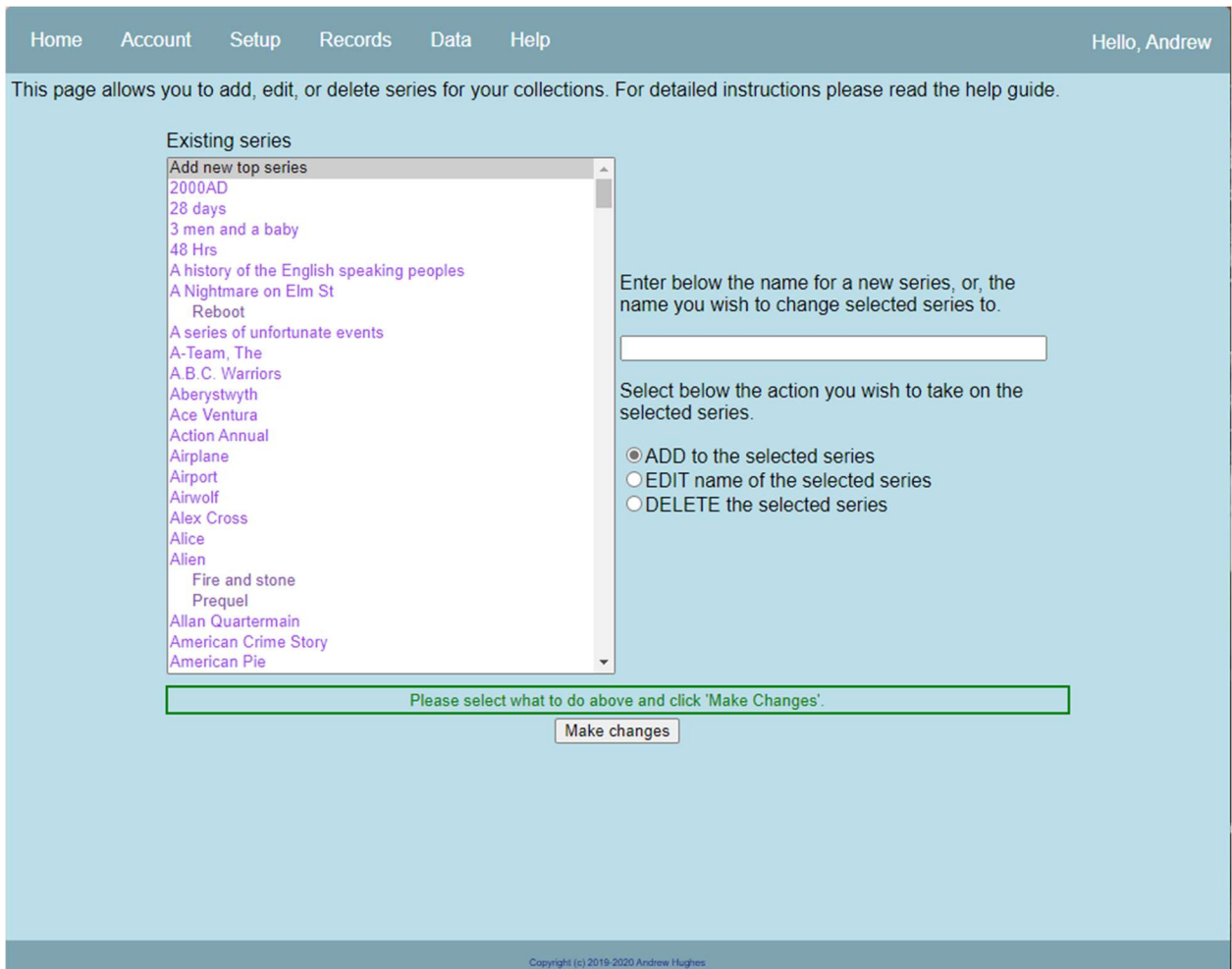


Fig. 7 – Series page

5.2.1. Adding series

To create a new top level series select the top entry, 'Add new top series', then in the space to the right enter the name of your new series. The series name should be alphanumeric, that means it can include letters and numbers and a few other characters, up to a maximum of 50 characters. Any problems with the format will be displayed. Make sure you have selected the option to 'ADD' and then click the 'Make changes' button. Assuming all works correctly your new series will be created and the list of existing series will be refreshed to include your new entry.

If you wish to create a second or third level series select the series that will be the 'parent' for the new entry, enter the new series name in the space to the right, ensure 'ADD' is selected and click 'Make changes'. Again the list will refresh to include your new series name.

At each level of the series tree the name entered must be unique. This means that you can only have one top level series called 'Airport', but, you could add 'Airport' as a second level series under all your top level categories. If you try to add a series name at any level where it already exists you will see an error.

If you want to add the new series to multiple places at once you can do so by selecting all the places the new series should be added to, entering the new name, and then clicking 'Make changes'. If you happened to have top level series named 'Star Wars', 'Star Trek', and 'Alien' and to each of those you wanted to add a series called 'Original movies', you would select all three of those top level series, enter 'Original movies' in the space to the right, and click 'Make changes'.

5.2.2. Editing series

If you make a spelling mistake with any of your series you can change its name. To do this select the exact series you wish to change. When you do this its name will appear in the space to the right. Edit the name to what you now want it to be, select the option to 'EDIT', then click 'Make changes'. If all is well the list of series will refresh to include your change.

Note that you cannot change the name of a series to the name of an existing series in the same position.

You also have the option to change multiple names at once. If you had added a series 'Original moies' to several of your other series the quickest way to fix this is to select all the misspelled series, enter 'Original movies' into the space on the right, then click 'Make changes'.

If any problems occur while the changes being made they will be displayed. It is important to note that changes are processed in order so it is very possible that some of your changes may take effect but others, that caused errors, will not.

The site doesn't really care about the case of your entries, so if you have a series called 'Judge DREdd' but it should be 'Judge Dredd' you cannot directly edit it, as the site will think it is already the same thing. The way to solve that problem is to change it first to 'Judge D', then immediately re-edit it to 'Judge Dredd'.

5.2.3. Deleting series

The final option you have for series is to delete them. This is an irreversible process and while it will not cause any data associated with your item records to be deleted it may cause them to lose their series information. Even though you can re-add a series with the same name the internals of the site will not know it is the same and so the links to your item records are permanently broken.

You can select to delete just one series, or, you can select many at the same time. When you select a series that has any sub-level series all of those will automatically be deleted, you do not need to select them individually.

Once you have selected the series you want to delete select the 'DELETE' radio button. When you do this an extra option will appear underneath the 'DELETE' line with a checkbox that you

must also tick to confirm you want to delete the records. This is to avoid you mistakenly deleting information. Once you are sure you have the right entries selected click the 'Make changes' button and those series will be deleted.

After each deletion the confirmation checkbox will be reset to blank so that you cannot simply click 'Make changes' over and over and mistakenly delete a lot of information.

5.3. Linking series to categories

Now that you have some categories and series created you can choose to link them together. If you leave things at defaults everything in the system will work perfectly well, but when you want to choose a series for a new item you are adding to the site you will have to work through all the series you have created. This page will allow you to limit the series shown to just the categories they are relevant to.

When you load the page you will see two boxes, side by side. The left one will show a list of all your series and the right one will show your categories. If you don't have categories or series a message will be shown in the relevant box and you won't be able to do anything else on this page.

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Account', 'Setup', 'Records', 'Data', and 'Help'. The user's name 'Hello, Andrew' is displayed in the top right corner. Below the navigation bar, a message states: 'This page allows you to link series to categories. For detailed instructions please read the help guide.'

The main content area is divided into two columns:

- Series:** A list of series including '2000AD', '28 days', '3 men and a baby', '48 Hrs', 'A history of the English speaking peoples', 'A Nightmare on Elm St', 'A series of unfortunate events', 'A-Team, The', 'A.B.C. Warriors', 'Aberystwyth', 'Ace Ventura', 'Action Annual', 'Airplane', 'Airport', 'Airwolf', 'Alex Cross', 'Alice', 'Alien', 'Allan Quartermain', 'American Crime Story', 'American Pie', 'American Werewolf', 'Anaconda', 'Angels (Disney)', and 'Any which way you can'.
- Categories:** A list of categories including 'Applies to all categories', 'Books', 'Art', 'Comic Annuals', 'Comics', 'Dilbert', 'Dungeons and Dragons', 'Encyclopedias', 'Graphic Novels', 'Humour', 'Magazines', 'Maps', 'Oversize', 'Regular size', 'Non-fiction', 'Oversize', 'Regular size', 'Novels', 'Railways', 'Textbooks', 'Time Life books', 'Titanic', 'Collectibles', 'Fairies', and 'Figurines'.

Below the two columns, a green-bordered box contains the text: 'Please select a series above to proceed'. Below this box is a 'Make changes' button.

At the bottom of the page, the copyright notice reads: 'Copyright (c) 2019-2020 Andrew Hughes'.

Fig. 8 – Linking series to categories

This page is very simply to use, although care is needed to ensure you don't mistakenly link the wrong things together. Even if you do, however, it causes no problems within the site at all. The worst that can happen is that you have to re-link some of the data.

By default every series is set to apply to every category. You can verify this by clicking on a series and you'll notice that in the categories box, on the right, the very top entry 'Applies to all categories' is selected.

When you have determined that a particular series should only apply to certain categories you should select that series in the left-hand box, and then select ALL the categories to which it should be linked. If you have already created some links all the linked categories for that series will be highlighted as soon as you select the series. This is where you need to take care.

If you simply click a category in the right-hand box ALL your existing links are de-selected right away. This is simply how Windows works. If you do this by mistake and don't want to re-select everything you should simply select another series immediately. No changes are permanent until you click the 'Make changes' button.

To select more than one category to be linked to the series you should use 'CTRL-click' to select each of the categories. You can also use this method to add extra categories if you have already assigned some. Note that 'CTRL-click' may only work on Windows PCs but there will be similar options for other devices.

You can select categories at any level in the category tree and the series will apply to all sub-categories as well. For example if you apply a series 'Alice in Wonderland' to the category 'Books' then every sub-category of books will show you the 'Alice in Wonderland' series. If you select to link that series to only a third level category 'Books – Fiction – Fantasy' then it will only appear at that level.

Once you have selected the series and all appropriate categories click the 'Make changes' button. Unless any errors are shown it is safe to assume that the process completed. If the correct categories are still selected then you are good to go. This process is very fast.

5.4. Fields

As discussed earlier a field is a space where you can enter a piece of data. Fields are the most customisable part of the site and one that will require some thought on your part. While you can edit them you may run into problems doing this so it is best to put some thought into this part of the site early on. When you load the page it will show as below, although with your list of categories. If you have yet to create any categories you won't be able to do anything else on this page.

Home Account Setup Records Data Help Hello, Andrew

This page allows you to setup the fields you will use for the items in your collections. For detailed instructions please read the help guide.

Existing top level categories	Alphanumeric fields	Numeric fields	Date fields
Books	1: <input type="text"/>	1: <input type="text"/>	1: <input type="text"/>
Collectibles	2: <input type="text"/>	2: <input type="text"/>	2: <input type="text"/>
Currency	3: <input type="text"/>	3: <input type="text"/>	3: <input type="text"/>
Lego	4: <input type="text"/>	4: <input type="text"/>	
Media (audio)	5: <input type="text"/>	5: <input type="text"/>	
Media (visual)	6: <input type="text"/>		
Model Trains	7: <input type="text"/>		
Pictures	8: <input type="text"/>		
	9: <input type="text"/>		
	10: <input type="text"/>		

Please select a category above to proceed.

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Fig. 9 – Defining fields

Every item you add to the site will include a category and a title. These are the only two mandatory fields that you must enter and so they are built into the site for you. In addition to these entries you can have up to ten text-based fields, five numeric fields, and three date fields. The entries you make here will be used as headings for data you add to your items later. A simple example might be that you want to record the authors of books in your collections. Author would therefore be a field you would define here.

You should note that when adding items later the first eight of the text fields are limited to 100 characters each, and the ninth and tenth text fields can be up to 500 characters. The limit for the length of all entries on the fields page is 25 characters.

To keep things easy it is determined that the fields are defined at the top level and that all sub-categories will use the same fields.

5.4.1. Adding fields

To get started you need to click a category on the left-hand side. You can now enter the fields you want to use for this category into the relevant boxes on the right-hand side.

We'll assume you have a category called 'Books' and have selected that. If you wanted the first text entry to be the author of the book you would enter 'Author' into box 1 under 'Alphanumeric fields'. If you wanted to track the genre as well you would enter 'Genre' into box 2. If you wanted to track the number of pages you may enter 'Number of pages' into box 1 under 'Numeric fields'.

How you use the fields is entirely up to you. You can use the same entry for multiple fields if you wish, i.e. you may want to record up to three authors for each book and so you could enter 'Author' for the first three text records. I would suggest adding a number to the end of the field to keep them slightly different, e.g. 'Author 1', 'Author 2', and 'Author 3'.

You do not have to use the fields in order, i.e. you could chose to put the text entries above into boxes 5 and 8 if you wanted, it makes no difference to the site. The only caveat is that when these entries are shown on the pages where you add your items they will be shown in numeric order, so 1, if you use it, will always be first, 2 will always be second and so on. Empty entries are skipped.

You do need to consider the data you wish to keep for your items while setting up your fields. If you wanted to keep a synopsis of a book, for example, you would probably need to use text fields 9 or 10 as these each allow you to store up to 500 characters.

Another important consideration is that while you can change your mind later on as to which fields you wish to use, changing the fields does NOT change the data stored in the items. Consider the example above of using 'Genre' in position 2 of the text fields. If you have already added 100 items to your collection of books and then added a genre for all of them, but then decide you want field 2 to be a second entry for author there is nothing to stop you changing the description of that field to be 'Author' – but – all the existing genre data will remain where it was which will make no sense.

Once you have entered the fields you wish to use you should click 'Make changes'.

5.4.2. Editing fields

Editing fields is essentially the same process as above. You select the category on the left and all your existing entries are shown on the right. You can add new ones, edit existing ones, and even delete them by simply removing everything from one of the boxes. When all changes are made simply click 'Make changes'.

Note that removing a field from use here does NOT delete the data associated with it from the actual item records. If you had set the first numeric field to be the number of pages in your books, and had added that data to every book in your collection, removing the field entry here will simply prevent you from seeing that data in the item. The data is still there, it's just hidden. You can always re-show it by adding an entry into the first numeric field again, but note that if

you now decide to call it 'Times I have read book' the data in your item records will make no sense as it will still be the number of pages in the book.

This is another reason why you need to carefully consider what information you want to store for each category.

5.5. Lookups

Lookups allow you to create lists of standard entries that you may wish to make on certain fields. The advantage to these lookups is that instead of typing an author's name 40 times and potentially making spelling mistakes you can simply select it from a list and ensure consistency in your data.

In addition to entering the lookup headings manually you can also import them. Note that this requires you to add values for the lookups at the same time.

While lookups are a very useful part of the site there are not required and you do not have to use them.

The screenshot shows a web application interface for managing lookups. At the top, there is a navigation bar with links for Home, Account, Setup, Records, Data, and Help, and a user greeting 'Hello, Andrew'. Below the navigation bar, a message states: 'This page allows you to add, edit, or delete lookups for the various data fields. For detailed instructions please read the help guide.'

The main content area is titled 'Existing lookups' and contains a scrollable list of lookup categories: 'Add new lookup', 'Artist', 'Author', 'Book genre', 'Media format', 'Model Train Manufacturer', 'Movie genre', and 'Music genre'. The 'Model Train Manufacturer' category is currently selected and highlighted.

To the right of the list, there are instructions: 'Enter below the name for a new lookup, or, the name you wish to change selected lookup to.' Below this is a text input field containing 'Model Train Manufacturer'. Further down, there is a section titled 'Select below the action you wish to take on the selected lookups.' with three radio button options: 'ADD new lookup' (which is selected), 'EDIT name of the selected lookup', and 'DELETE the selected lookup'.

At the bottom of the form, there is a green-bordered box containing the text 'Please select what to do above and click 'Make Changes''. Below this box is a 'Make changes' button.

At the very bottom of the page, there is a small copyright notice: 'Copyright (c) 2019-2020 Andrew Hughes'.

Fig. 10 - Lookups

The operation of the lookups page is virtually identical to the categories and series pages so full instructions are not repeated here. The only differences are:

- 1) Only one level of lookup is provided
- 2) You can only select one lookup to make changes to at a time

5.6. Linking lookups to fields

In order for the lookups you create to be useful you need to link them to the fields you have defined. You can only link a lookup to a text field. When you load the page to link lookups to fields you will see the page below, but with your lookup and category lists.

Home Account Setup Records Data Help Hello, Andrew

This page allows you to link lookups to specific fields within your categories. For detailed instructions please read the help guide.

Lookups	Categories	Defined fields
Artist Author Book genre Media format Model Train Manufacturer Movie genre Music genre	Books Collectibles Currency Lego Media (audio) Media (visual) Model Trains Pictures	Select Lookup and Category

Please select a lookup and a category above to proceed.

Make changes

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Fig. 11 – Linking lookups to fields

This page is very easy to use, similar to linking series to categories. To get started you should select a lookup from the left-hand box, then a category from the middle box. This will cause a list of the fields you have created for the category to appear in the right-hand box. If you have

yet to create any fields for that category you will see a message to that effect, and you won't be able to do anything further on this page.

A field can only be linked to a single lookup, although you can change which lookups are linked to which fields at any time.

A lookup, however, can be linked to multiple fields. A use for this may be if you chose to have up to three authors recorded for each book and you want to use a lookup called 'Authors' on all three fields.

Assuming you have created some fields, and they are displayed, there are three particular ways they will be displayed, each of which is explained here.

1) Field shown with (*) after it, e.g. 'Author (*)'

A field that is shown with (*) after it is linked to a lookup somewhere in the site. This is so that you know there is already a link and you may be about to link to it be mistake.

2) Field shown with (*) after it AND highlighted, e.g. 'Author (*)'

A field that is shown as such is linked to the current lookup that you have selected.

3) Field shown with nothing after it, e.g. 'Author'

A field shown like this is not linked to any lookups at all.

To make changes to the fields that the currently selected lookup applies to simply select the one(s) you want from the 'Defined fields' box and then click 'Make changes'. The list will be updated and you should notice that any fields to which you just added a lookup now have (*) shown after their name(s).

5.7. Lookup values

This is the final piece of setup you can do. It is only useful if you are chosen to use the lookups option. This page allows you to add entries for the lookups you have created, e.g. if you have a lookup called 'Authors' this is the page where you would add the names of all the authors.

You can also import the list of lookup values from a file and if you have a lot of entries that may be beneficial as it will save you a lot of time.

When you first load the page you will see a list of your lookup headings on the left and the rest of the page will be empty.

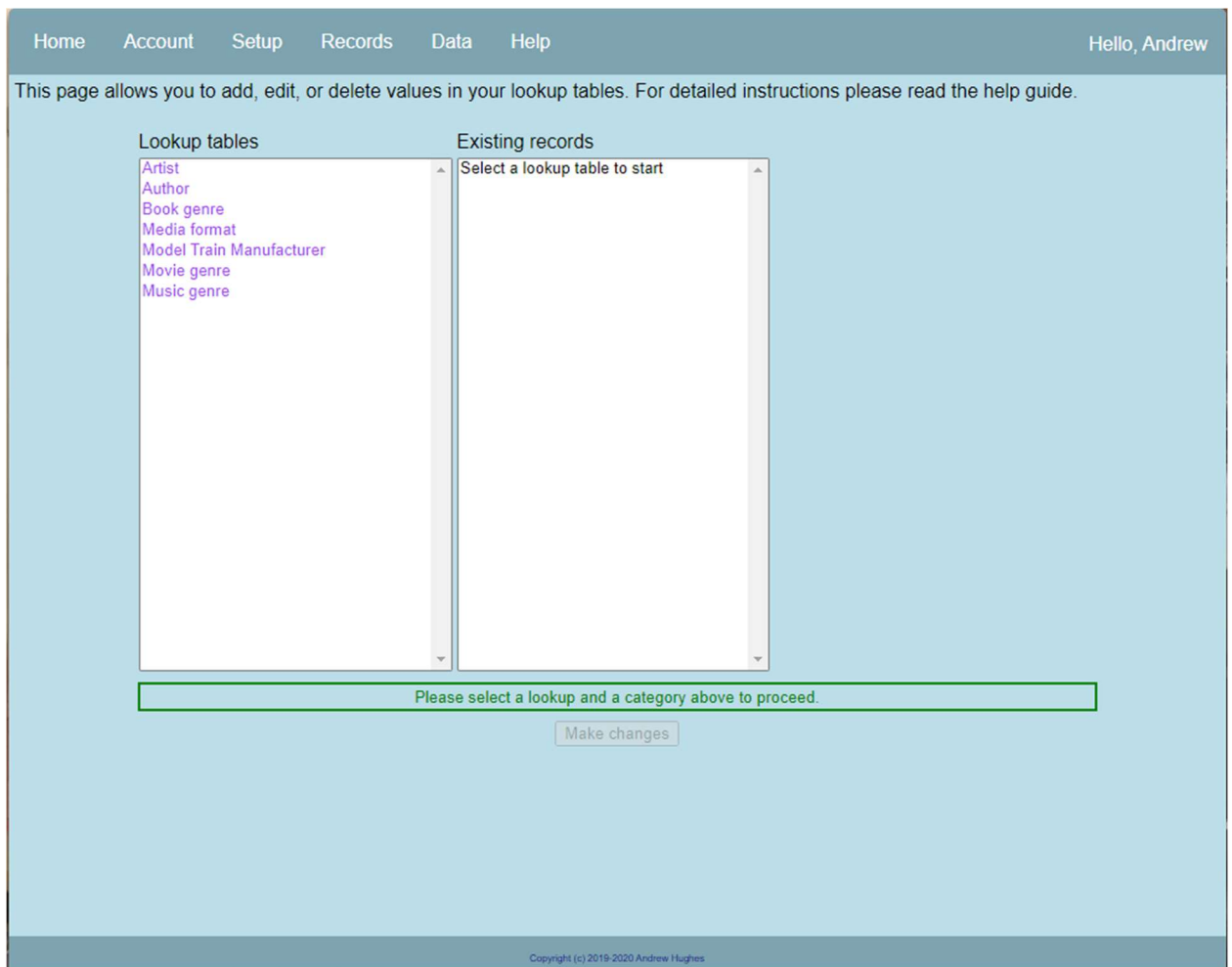


Fig. 12 – Lookup values

5.7.1. Adding lookup values

To get started you should select a lookup from the left-hand box. This will then show a list of existing values you have added for that lookup in the next box. To the right you will see an option to add a new value. Enter the new lookup value, ensure 'ADD' is selected, then click 'Make changes'. All being well the new entry will be saved and the list of existing records will be updated to include it.

5.7.2. Editing values

To edit an existing entry you should select it from the list at which time its value will appear in the box to the right. You should now edit it to match what you want it to be, ensure that 'EDIT' is selected, then click 'Make changes'.

The site doesn't really care about the case of your entries, so if you have a lookup entry for an author called 'Stephen King' but it should be 'Stephen King' you cannot directly edit it, as the

site will think it is already the same thing. The way to solve that problem is to change it first to 'Sephen King', then immediately re-edit it to 'Stephen King.

Editing any entries does not change any information already saved with your items. All the lookup does is allow you save time typing the same info multiple times so changing the lookup values just means you will see a new list next time you are adding items.

5.7.3. Deleting values

You can delete one, or multiple entries, at a time. To select multiple entries use 'CTRL-click'. You should ensure you have selected 'DELETE' and then click the 'Make changes' button. It is important to note that there is no confirmation of deletions on this page as deleting a lookup has no effect whatsoever on anything else, it just means that lookup will not be available when adding new items later. In this case adding a new lookup value with the exact same name will solve the problem.

6. Adding, editing, deleting collection items

Once you have completed as much of the setup as you want you can start to add the information about your collectible items. All of this is done from the 'Records' menu. The first option is to add a new record.

As with some other items you can import your record data as well. If you have a lot of records then importing it will save you a lot of time, especially if you already have it in a electronic form somewhere else.

6.1. Adding a new record

6.1.1. Layout of the page

Because you cannot add a record without a category the very first thing you see when you load the page is simply a drop down box with a list of your categories. If you have not created any categories then you cannot do anything more on this page.

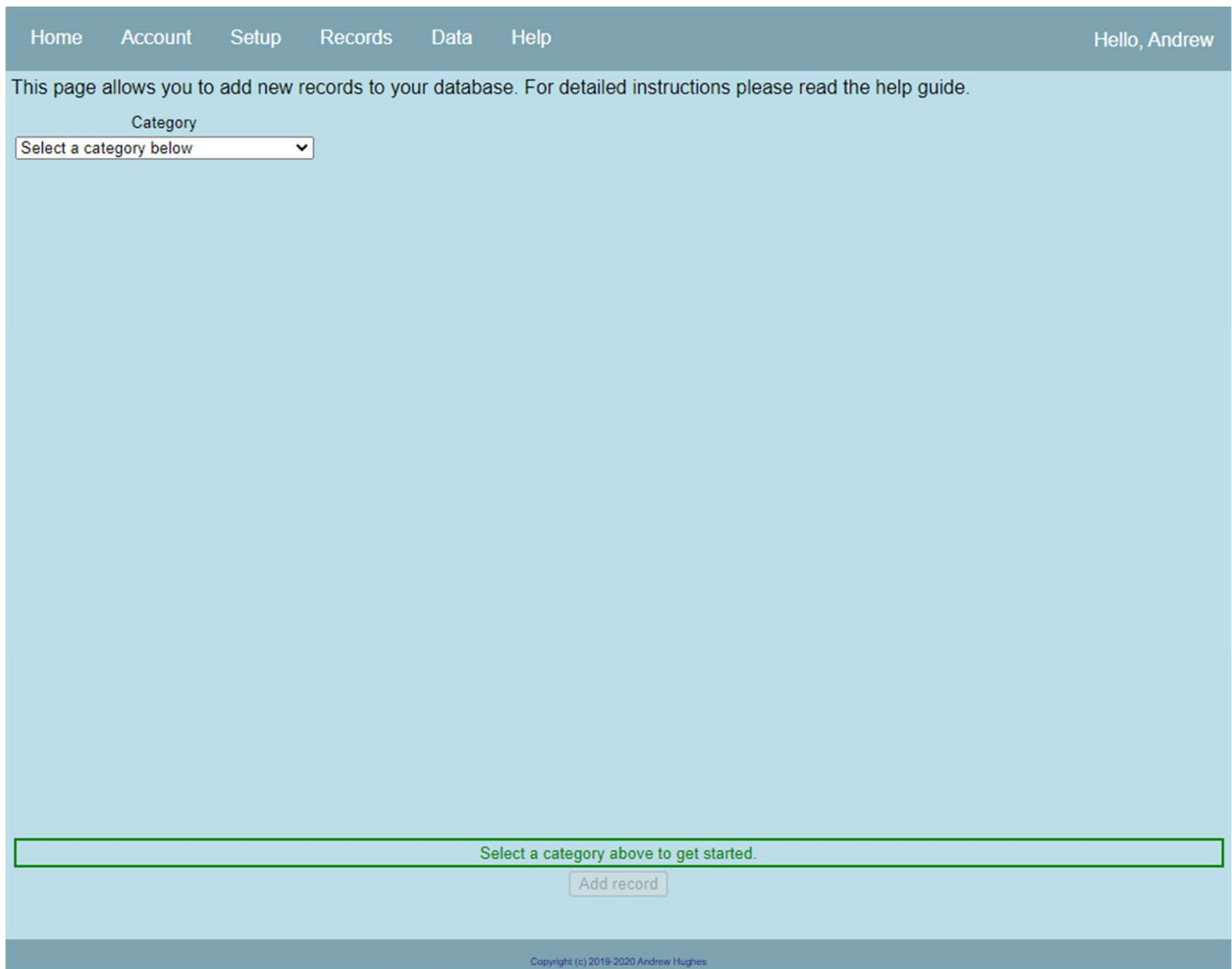


Fig. 13 – Adding a new record, initial page

Once you select a category the page will change to show a lot of spaces for you to enter information about your items. The exact layout and entries you see will be unique to the settings you have configured for yourself. The image below is based on my own setup, and the options I have set for a category 'Books'.

Home Account Setup Records Data Help Hello, Andrew

This page allows you to add new records to your database. For detailed instructions please read the help guide.

Category:
 Series 1:
 Series 2:
 Series 3:

Top level category: Books
 Issue No. :
 Issue No. :
 Issue No. :

Item Title :

Author 1:
 Author 2:
 Author 3:
 Author 4:
 Genre 1:
 Genre 2:
 Loaned to:

Date added:
 Date loaned:

Image of your item

Your image here

Select image : No file chosen

Select a category above to get started.

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Fig. 14 – Adding a record after selecting a category

The screen is divided into three main sections for this page, shown and explained below.

Home Account Setup Records Data Help Hello, Andrew

This page allows you to add new records to your database. For detailed instructions please read the help guide.

Category: Series 1: Series 2: Series 3:

Top level category: Books Issue No. : Issue No. : Issue No. :

Item Title :

Author 1:

Author 2:

Author 3:

Author 4:

Genre 1:

Genre 2:

Loaned to:

Date added:

Date loaned:

Image of your item

Your
image
here

Select image : No file chosen

Select a category above to get started.

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Fig. 15 – Sections of the records page

The top section (red) of the page is the same no matter what fields you have defined. It allows you to select the category, up to three series, and the title for the item.

The left-hand section (blue) will show all the text fields that you have defined, if any. If you have not selected any text fields to use this section will be blank. At most it will show all ten of the available text fields.

The right-hand side (green) will show the numeric fields you have defined, if any. Underneath these will be the date fields, again only if you have defined them. Underneath that you will see a section that allows you to add an image to your item. The image section will always be present, even if you have not defined any numeric or date fields.

6.1.2. Adding a new record

Once you have loaded the page and selected a category you will see the page, as shown above and divided into the three sections, although with your own fields shown.

Underneath the category you will see, in small blue text, the name of the top level category. This is more useful when editing a record but as you can only see the sub-category you have selected this is a reminder of the top level category to which this record will be added.

You can enter the data in any order you like.

If your record should be linked to any series you can select them here. You can select up to three distinct series to which this record can be linked. For each that you wish to use simply select the series from the drop down options. As has been mentioned earlier if you have linked your series and categories you will only see the series that are related to the category you selected.

Underneath each of the series drop downs is a box where you can enter an issue number for that series. This must be numeric, and an integer. The purpose of this is to record the issue of a magazine, or the position within a series of books that this particular entry belongs. It could also be used to record the year of an annual publication.

Below the series options is the space for the title of the item. This is the only other entry that you must fill in. The title is limited to 100 characters.

Now you can do all the fields that you selected while setting up. As these are entirely of your own design it's impossible to determine what you can, and should, store in each of them.

For the date fields it is easiest to use the date picker icon to select the date to use. There are a lot of date formats available in the world. The format you see on your screen will likely be that of your device but hopefully the site will be able to convert that to the correct format to save.

The final item that you can add to your record is an image. This can be a JPG/JPEG/PNG format file up to 2MB in size. To select the image you want to use select the 'Choose File' button and then browse to the image you want to use.

Once you have entered all the information you want click the 'Add record' button. If no problems are shown you should get a confirmation that your record was added successfully. If any problems are detected with your information you will see messages telling you what you need to correct.

6.1.3. Editing a record

In order to edit a record you first need to find the record to edit. When you select the option to edit you will be directed to the search page, described in more detail further on. You need to search for the record to edit. In the search results there will be a * alongside the record information, in the 'Edit' column. When you click the * the edit records page will load and display the information for the record.

Note that the edit record page will load in a new tab in your browser. This is done because if it loads in the same window as the search options and you click to go back to the search page the previous search is lost.

The edit record page is identical to the add record page, and has all the same requirements. You can edit any of the information on the screen.

If you want to replace the image, if any, or add a new one you can do that by clicking 'Choose File' and selecting a new image. Note that if you replace an image the old one will be removed from the site.

There is also an option to remove the image if you want to take it away from this record and not upload a new one. To do this simply click the box next to 'Remove image?'

When you have made all the changes you want click 'Edit record'. If all is well you will see a message confirming that the changes have been made. If you selected to add or change the image the new image will be shown.

6.1.4. Deleting a record

If you want to delete a record completely you can do so. As with editing you need to search for the record first, then click the * alongside the record but under the 'Delete' column.

Note that the delete record page will load in a new tab in your browser. This is done because if it loads in the same window as the search options and you click to go back to the search page the previous search is lost.

The record will be shown with all the information related to it. While you can change the data here there is no point to that as the only option is to delete the record. If you are certain that you wish to delete the record click the 'Delete record' button. A confirmation will be given once the record has been deleted and all the information on the page will be cleared.

7. Data options

There are a few ways to interact with your data outside of the adding/editing/deleting pages.

7.1. Searching for records

The main way to interact, and the one that is really the entire point of the site, is the search page. Using this page you will be able to find any combination of your date records that you want (with one caveat).

The search page will be as below, although you will see your top level categories and series, if any.

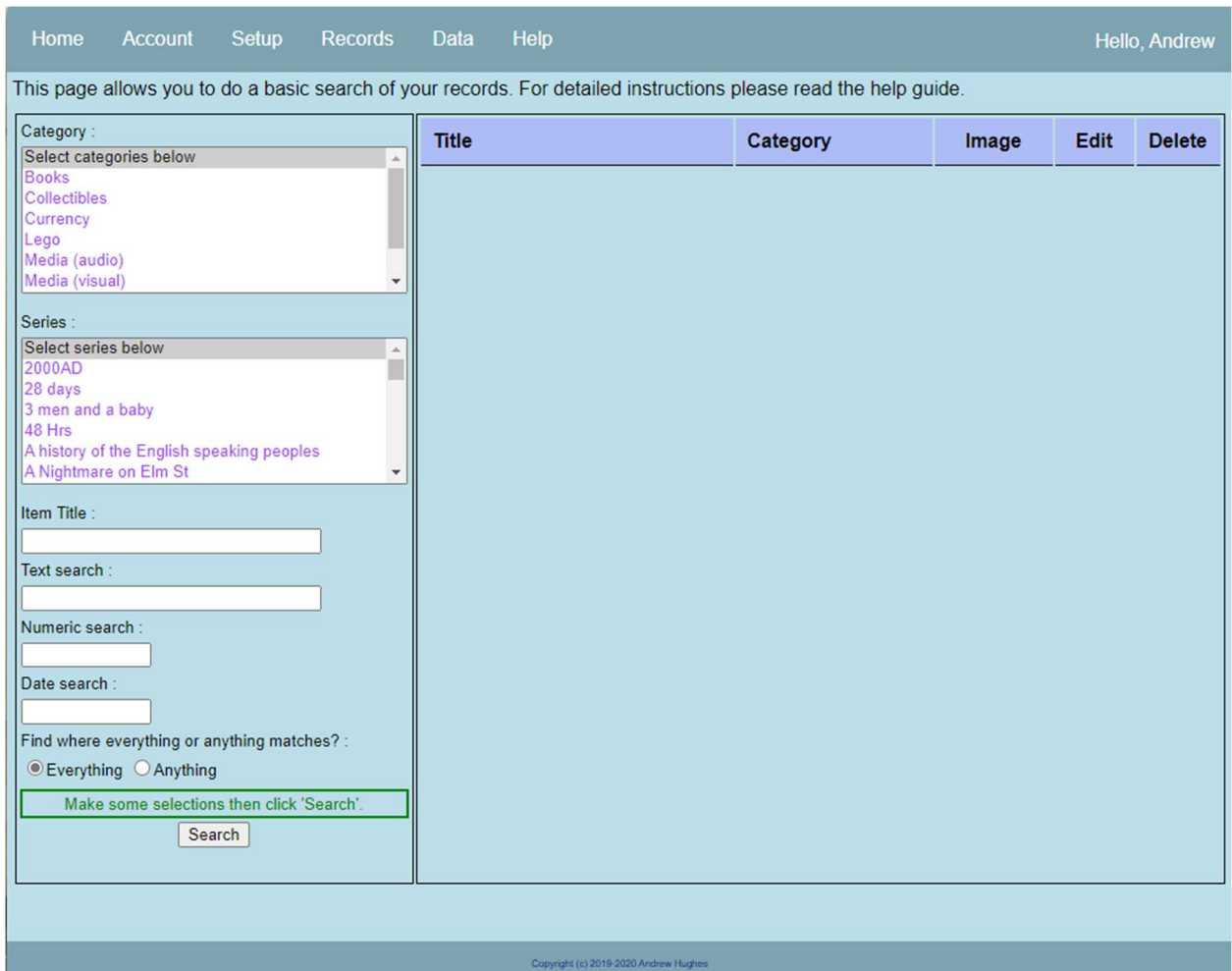


Fig. 16 – The search page

The search page is split into two sections, the search options on the left and the search results, on the right.

The search options, from top to bottom are:

Category: You can select one, or several, of your categories to include in the search. If you don't select any then all categories are automatically included. Only top level categories are available.

Series: You can select one, or several, of your series to include in the search. If you don't select any then all series are automatically included.

Item Title: This allows you to search for the title of a record. The search will find records where the entry you make here exists anywhere within the title. If you enter the letter 'e' then every single title containing the letter e will be found. If you enter the word 'and' then any titles containing and, hand, wand or any other words with and will be found. If you put in an exact title, e.g. 'The Dark Tower' then you will find all titles that include those three words, in that exact order.

Text search: This will search all ten of the text fields for all records. It works the same as the title search.

Numeric search: In here you can enter any numbers you want to find. This works in a similar way to the text entries, i.e. if you enter the number '1' it will find every number containing a 1.

Date search: This is the final entry you can include. It works the same as the others, so if you enter '11', for example, you will find all entries for November (the 11th month), or for the 11th day, or for any years containing an 11. You can also search for exact dates and if so you must use the format 'yyyy-mm-dd'. If you enter '2020-11', for example, you will find every date relating to November 2020.

You do not need to enter any of the information above. If you leave everything at defaults the search will find every record you have.

There is an option near the bottom where you need to select between 'Everything' and 'Anything'. The default is 'Everything'. The difference between these two is given below:

For the explanations below we will assume you are using the following search terms:

Category : Books

Title : Green

Everything: When you search for everything then ALL the search terms you entered above must exist for a record to be found. Using the example above this would find only books that include the 'Green' in the title. This would include, for example, 'The Green Mile'.

Anything: If you do an Anything search then any of the search terms can match. With the example above this means ALL your books will be found, and also any item that has the word 'Green' in the title even if it is not a book. This may include 'Green Lantern' (a movie), for example.

An 'Everything' search will help you find a more precise match to your terms.

Once you have entered any terms you want to search for click 'Search'. If any matching records are found they will be shown in the right-hand section of the screen. The results are limited to ten per page. If there is more than one page of results you will see various options underneath the results that will help you navigate. The options may vary depending on the number of pages of results, and also which page you are on. At the bottom right of the page you will see a count of the total number of pages and which page you are on.

The search results are limited to 500 pages, i.e. 5000 records.

If you have an image associated with an item you will see a thumbnail of it in the search results. Clicking the thumbnail will change the display to show a bigger version of the image.

If you are on a mobile device you will notice that the 'Edit' and 'Delete' columns are missing. This was done deliberately to reduce the information being passed to the device. As the purpose of the mobile site is to allow you to find items that you own while you are away from home it shows just the basics.

7.2. Validate info

While every effort is made to ensure that data consistency is maintained it is possible that errors within the site, or some things you may inadvertently do, may cause problems to occur in your data.

Running the validation process will make a series of checks on your data. Some of the checks will result in problems that cannot be corrected and in those instances some data may be updated by the site. Other data issues can be fixed by yourself and in those instances the sections below will tell how you to resolve the problems.

The site will run occasional checks on your data automatically and resolve any issues it can.

Whether you run a validation check manually, or if the site does an automatic one, any problems found will be sent to you in an email. They are also displayed on the screen when you run a manual validation but as they will disappear when you change to a different screen the email will have a permanent record of them.

Should more than 500 validation errors be found the site will stop processing any more.

Check being made	Explanation of the check	What to do if errors are found
Categories in data records	<p>This will check if any data records are missing the category entry.</p> <p>This could happen if you delete a category after it has been assigned to one or more records.</p>	Search for the records and edit them to add a category back in.
Field mappings	<p>This will check that any fields you have defined are linked to a valid category. If any problems are found the site will delete the fields in question. There is no way to recover the fields in this situation.</p> <p>This may happen if defined some fields for a category and then deleted the category.</p>	There is nothing you can do if this occurs, the site will delete the affected data.
Categories and series links 1	<p>This check will ensure that any links you have created between series and categories are still valid. If any problems are encountered the site will delete the invalid links as they cannot be recovered.</p> <p>This should never occur, but may if something goes wrong within the site.</p>	There is nothing you can do if this occurs, the site will delete the affected data.
Categories and series links 2	<p>This check will check the links between series and categories and ensure the category in the link still exists.</p> <p>This check should never produce an error but may if something goes wrong within the site.</p>	If you see a problem reported here you should visit the 'link series to categories' page, find the series referenced, and then re-link it to the category.
Series 1 in data records	<p>This will check all data records and ensure that any entries you had made for series 1 are still valid. If the series has been deleted this error may occur.</p> <p>This should not occur but may in some cases.</p>	If you see this error reported you should find the record in question and either set it to not be linked to a series, or re-select the correct series.
Series 2 in data records	<p>This will check all data records and ensure that any entries you had made for series 1 are still valid. If the series has been deleted this error may occur.</p> <p>This should not occur but may in some cases.</p>	If you see this error reported you should find the record in question and either set it to not be linked to a series, or re-select the correct series.

Series 3 in data records	<p>This will check all data records and ensure that any entries you had made for series 1 are still valid. If the series has been deleted this error may occur.</p> <p>This should not occur but may in some cases.</p>	<p>If you see this error reported you should find the record in question and either set it to not be linked to a series, or re-select the correct series.</p>
Categories and series links 3	<p>This check will verify that the series referenced in any series to category links exists. If any problems are found the site will remove the affected links as they cannot be recovered.</p> <p>This error should not occur but may if something goes wrong in the site.</p>	<p>There is nothing you can do if this occurs, the site will delete the affected data.</p>
Lookup value headings	<p>This check will make sure that any lookup values you have entered, e.g. a list of authors, has a valid lookup heading associated with it. If any problems are found the affected lookup values will be deleted.</p> <p>This error should not occur but may if something goes wrong in the site.</p>	<p>There is nothing you can do if this occurs, the site will delete the affected data.</p>
Lookup headings against fields	<p>This will check that any lookups linked to fields are valid. If any invalid links are found they will be deleted as it is not possible to recover them.</p> <p>This error should not occur but may if something goes wrong in the site.</p>	<p>There is nothing you can do if this occurs, the site will delete the affected data.</p>
Orphaned data (text)	<p>This will check all records against all text field definitions and ensure that if data exists in a record that a field definition also exists. This may happen if you define a text field for a record, add some data, and then remove that text field definition.</p>	<p>If this occurs you should add a new field definition for the identified category and field position.</p>
Orphaned data (numeric)	<p>This will check all records against all number field definitions and ensure that if data exists in a record that a field definition also exists. This may happen if you define a number field for a record, add some data, and then remove that number field definition.</p>	<p>If this occurs you should add a new field definition for the identified category and field position.</p>
Orphaned data (dates)	<p>This will check all records against all date field definitions and ensure that if data exists in a record that a field definition also</p>	<p>If this occurs you should add a new field definition for the identified category and field position.</p>

	exists. This may happen if you define a date field for a record, add some data, and then remove that date field definition.	
Invalid image names	<p>This check will ensure that any images referenced by your records exist. If any discrepancies are found the image information in that record will be deleted as it cannot be recovered.</p> <p>This error should not occur but may if something goes wrong in the site.</p>	If this occurs you should search for and edit the affected record and re-upload the appropriate image.
Missing image sizes	<p>When you upload an image the site creates several different sizes of the file for use on different pages. If any of the different sizes are missing the site will re-create them.</p> <p>This error should not occur but may if something goes wrong in the site.</p>	There is nothing you can if this error occurs and the site should be able to resolve it automatically.
Images not linked to record	<p>This check will verify that any image files you've uploaded are linked to a data record. If any are found that are not linked the image files will be removed.</p> <p>This error should not occur but may if something goes wrong in the site.</p>	There is nothing you can if this error occurs and the site should be able to resolve it automatically.

7.3. Export data

If you want to get your data into another program so you can manipulate it you can export certain sections of your data. You cannot import absolutely everything because some of it only makes sense within this particular site, but all the data that could work somewhere else can be exported.

The four sets of data you can export are your categories, series, lookup data, and your actual data records. The page to allow this looks as below.

Data set	Export?	Status
Export series data :	<input type="checkbox"/>	Not started
Export category data :	<input type="checkbox"/>	Not started
Export lookup data :	<input type="checkbox"/>	Not started
All records :	<input type="checkbox"/>	Not started

Choose your CSV delimiter

Comma Semi-colon

Please select which data sets to export then click 'Export'.

Export

Fig. 17 – Exporting data

All data is exported as a CSV file. You can choose any or all of the data types to export, and then whether you want to use a comma or a semi-colon as the separator. Once you have made your selections click the 'Export' button.

Exactly what happens then will depend on your browser. What should happen is that you will see a prompt to open or save the CSV file(s). If you have selected to export more than one data set there will be a few seconds delay between each of them being exported.

7.4. Import data

Importing data is one of the most useful things you can do as it could save you a lot of time adding your data to the site. However, it is also an option that could cause a lot of damage to your data if you do it incorrectly so it's very important to be sure you test your imports first.

The import page looks like this.

Data set	Import?	Status
Import series data :	<input type="radio"/>	Not started
Import category data :	<input type="radio"/>	Not started
Import lookup data :	<input type="radio"/>	Not started
Import NEW records :	<input type="radio"/>	Not started
Import UPDATED records :	<input type="radio"/>	Not started

TEST only (when ticked) :

Select CSV file to import : No file chosen

Select a single data set and choose a file then click 'Import'.

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Fig. 18 – Importing data

Because each type of data you can import needs different information you can only import one type of data at a time. By default none of the options are selected and you need to choose the one you want to use.

There is an option to test the import to make sure all the data will import correctly. This option is enabled by default and it is highly recommended that you test your data until you see no errors shown.

Once you have made your choices for the items above you should click the 'Choose File' button and select the CSV file that you want to import. Details of how to format each of those files is given in sections below.

If you are testing the import the site will process the file you selected and report any errors on the screen. You should resolve the errors and then test again and continue this process until no errors are detected. After that you can unclick the 'TEST' checkbox and import the data for real. Note that you have to re-select the file to import each time.

7.4.1. Series data

The import file for series can contain any number of lines, but it must be a CSV file and it must contain exactly three entries per line. If any of the data you want to import includes spaces, e.g. 'Stephen King' you must enclose those entries in double quotes.

The first entry in each line is mandatory and is the top level series for that line. The second position would be a second level series, and, it would become a sub-series of the first entry. The third entry would become a sub-series of the second level.

You do not need to have either of the sub-series included but you must include the CSV separators for them. If any of your lines contain a second or third level series without the higher series being present that line will cause an error.

The maximum length for each of the three entries is 50 characters.

Example 1:

Shannara,"The Heritage of Shannara",

In the line above only two entries are complete, but the final comma creates the third entry as empty text. If Shannara does not exist it will be created as will "The Heritage of Shannara".

Example 2:

,Batman,"The Dark Knight"

The line above would be rejected because there is no first level series for the other two entries to reference.

Example 3:

Batman,

The line above would be rejected because it does not have enough entries: there are only two.

7.4.2. Category data

The import file for categories can contain any number of lines, but it must be a CSV file and it must contain exactly three entries per line. If any of the data you want to import includes spaces, e.g. 'Model Trains' you must enclose those entries in double quotes.

The first entry in each line is mandatory and is the top level category for that line. The second position would be a second level category, and, it would become a sub-category of the first entry. The third entry would become a sub-category of the second level.

You do not need to have either of the sub-categories included but you must include the CSV separators for them. If any of your lines contain a second or third level category without the higher categories being present that line will cause an error.

The maximum length for each of the three entries is 25 characters.

Example 1:

Books,"Non-Fiction",Paperback

The line above would result in all three entries being created if they did not already exist.

Example 2:

Books,,Paperback

In the line above the top-level category 'Books' would be created, but because the second position is empty neither it or the third position entry would be created.

Example 3:

Books,

In the line above the entire line would be rejected as it only contains two entries.

7.4.3. Lookup data

The file for the lookup data should have two entries per line. The first should be the name of the lookup, e.g. 'Author' or 'Artist', and the second should be the value associated with that lookup, e.g. 'Stephen King' (for an author).

The maximum length for the first entry is 25 characters and the maximum for the second is 50 characters.

Example 1:

Artists,"Pet Shop Boys"

The line above would create a new lookup heading called 'Artists', if it did not exist, and would then add the entry 'Pet Shop Boys' associated to that heading.

Example 2:

, "Pet Shop Boys"

The above line would be rejected as there is no heading entry.

Example 3:

Artists,

The above line would be rejected as there is no value associated to the heading.

7.4.4. Importing NEW records

Importing new records will potentially save you the most time overall but requires the most care to ensure everything is accurate. Even if no errors are shown you could easily import a lot of records with the wrong, but valid, category assigned.

No examples of record imports are given due to the size and complexity of the lines, but the details required for each line are shown below.

Each line of the import file must have exactly 26 entries. Any lines with more or less entries will cause an error.

- The first entry is the title of the record. It should be alphanumeric and 100 or fewer characters long. If it contains any spaces you enclose it in double quotes.
- The next ten entries are for the ten text fields and are entered in order of 1 to 10. You should determine from your field mappings what each field is for, relative to the category of the item you're entering on the line. The first eight text fields are limited to 100 characters and the ninth and tenth can be up to 500 characters.
- The next five entries are for the five numeric fields and must be either blank or contain a valid number. These can include a decimal point.
- The next three entries are for the three date fields. These should be blank or in the format YYYY-MM-DD. This is the format the system stores dates in and to avoid any

confusion over different formats around the world the import routine will assume you use this format.

- The next entry is the category. This entry must be valid as every record must have a category. You can use your exported category file to assist in creating the entry here. The format must be:

Top level category---Second level category---Third level category

You only need to include the levels you need, but they must exist from first to third. An example here may be "Books---Fiction". Note that the separator between each level is three dashes.

- The next entry is the entry for series 1. This should either be blank, or formatted the same as the category entry, i.e.

Top level series---Second level series---Third level series

You only need to include the levels you need, but they must exist from first to third. An example here may be "Shannara---The Heritage of Shannara". Note that the separator between each level is three dashes.

- The next entry is the issue value for series 1. This must be an integer.
- The next two entries are for series 2 and series 2 issue.
- The final two entries are for series 3 and series 3 issue.

7.4.5. Import UPDATED records

This option is very similar to adding new records, except it can only be used to update existing records, it will not add new ones. You can also use this option delete records, if you choose.

The only safe way to use this option is to export all your data records, using the export page, and then edit that file and re-import it. Failure to do this process is almost certainly going to cause issues.

You do not need to re-import the entire export CSV file, although you could. If you have 100 entries in your export file but only want to edit or delete five of them it is recommended to remove the other 95 entries from the file before importing. This minimise the risk of any data corruption.

To set a record to be deleted you should change the title to be 'DELETETHISRECORD'. During import any record found to have that title will be removed from the site.

Each line in the import file must have exactly 27 entries. The specifications for the file are identical to that for adding new records, detailed above, except for the 27th entry.

The 27th entry in the export file is the unique identifier the site uses to reference that record. The only place you can get this identifier is from the export records option.

CAUTION – As the 27th row in the file is the unique ID associated with that record it is critical it is not changed. If you change it you will almost certainly corrupt your data. You may also end up trying to change another user's data. In that instance your account will automatically be banned from using the system. You should **NOT** change the Item IDs that are exported from the system.

For example, if your export file contains Item IDs including 15, 19, and 20 you could change the line with ID 15 and put ID 20 in its place. The import would work but you have now put all the data for record 20 into record 15. **YOU SHOULD NOT DO THIS AS YOU WILL ALMOST CERTAINLY CORRUPT YOUR DATA.**

Using the same example you could change the ID in a line in the export file for record 19 to record 12. If record 12 is owned by a different user your own account will be instantly banned from using the site if you try to import that file; you will get a warning about this if you test the import first. **YOU SHOULD NOT CHANGE THE ID ENTRIES.** If you lock your account out you will need to get in touch with the dev team who may, at their discretion, re-enable your account but this is not guaranteed.