

Creating Entity Records in CollectiveAccess

Before you begin

Search first

Before creating a new entity record, you must search in CA to see if an entity record already exists for the manufacturer:

1. To go Find in the menu, then click on Entities in the dropdown. This will take you to the Basic Search for all entity records in CA.
2. If an entity record already exists, do not create a new record. Search for it in the Related entities field when creating an object record.

The search-first rule ensures that duplicate entity records are not created. It is easier to prevent duplicate entity records than it is to fix them after they are made.

When to create

If after searching already present entity records in CA you find that a record for a manufacturer does not exist, you can create a new record.

Identifier

The format for entity identifiers is YYYY.1.NNN. The unique identifier for a new entity record is determined by the highest existing identifier for the current year in CA.

Finding the highest existing identifier:

1. Go to Find in the menu, then click Entities in the dropdown. This will take you to the Basic Search for all entity records in CA.
2. In the list view of all entity records, there will be a column titled Entity identifier. Click on the title to sort the records by the identifier. Higher identifiers will be at the top of the list.
3. Once you have determined what the highest existing identifier in use is, use the next number in the sequence for the new entity record. For example, if the highest existing identifier is 2026.1.15, the next identifier will be 2026.1.16.

Accessing the entity record editor

To create a new entity record in the system, go to New, then Entity in the dropdown. There will be further options for entity types.

Entity type

The entity types available are Corporate, Family, Other and Personal. Choose Corporate, as this will identify the record as an organization rather than an individual. Once chosen, a new entity record will be created.

Required fields

Every entity record must include the following fields before it can be saved:

- Identifier
- Display name (preferred label) - the manufacturer's name as it appears on its website. Do not add the legal form (GmbH, KG, etc.).

Recommended fields

- Status - tracks the completion status of the object record. When creating a new record, leave the status as "new." When done editing, change the status to "editing complete."
- Access setting - determines the access status of the record. Options are "accessible to public," "not accessible to public" and "restricted public access." If the record is intended to be available to the public, ensure that the object has the "accessible to public" status chosen after editing.
- Description - description of the manufacturer. This field will be accessible to the public.

- Internal Notes - additional information about the manufacturer, including a change in name or ownership.

Email address

Another recommended field to include in an entity record is the email address of the manufacturer's website. The address should be the homepage of their website, not the page for any specific products or collections held in the ADMC. For the address, include:

- Only the base URL, anything beyond is too fragile and could become broken in the future.
- No trailing slashes.
- https:// at the beginning.

To access the email address field:

1. First save the new entity record.
2. You will then have access to the Contact Info tab on the left-hand column of the entity record editor.
3. Record the information in the Email address field.
4. Save changes.

Saving and verifying

Once you are done editing the entity record, save the record by clicking the save button at the top or bottom of the record.

To verify that the entity record was saved correctly, create a new object record and test if you are able to find the entity in the Related entities search bar. If you cannot find the new entity, it might not have been completed correctly.

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