

TM

The logo for 'Collate' is rendered in a stylized, bubbly, golden-yellow font with a slight 3D effect and a dark shadow underneath. The letters are rounded and connected, giving it a friendly and approachable appearance.

Getting Started

Version 1.3

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If you want to create a Slideshow and save it to be used again at a later date you need to open the Slide Shows window. To do this select the 'Slideshow Groups' button at the bottom of the Slideshow Control Panel.

This window is split into two parts. The left side shows a list of all Objects entered into Collate.

By clicking the + sign by the side of an Object the list will expand to display a list of all Images assigned to that Object. You can either select the Object, and, by dragging & dropping, place all its Images into the Playlist window on the left. Alternatively you can select single Images from the expanded list and place them into the Playlist.

When you have finished preparing your Playlist select the 'Save this Play List' button, and enter a name for the Slideshow Group. To run this Play List select the 'Load this Play List' button, the window will close and the selected Images will be transferred to the Play List window on the Slideshow Control Panel, where you can run the Play List as normal.

Select an existing Slideshow



To play an existing Slideshow select the 'Select a Play List' button at the bottom of the Slide Shows window or select 'Slideshow - Select a Slideshow' from the Collate Main Menu. This will open a window with a drop down list from which to select the required Slideshow. Highlight the Slideshow you wish to play and select 'Okay'. The pre-saved list of Images will appear in the right hand side of the Slide Shows window. You can add or remove Images prior to playing by double clicking unwanted Images on the right of the screen or by selecting new Images from the left hand side of the screen. When the desired list is complete it can be played or saved (*for more information see Designing a Slideshow above*).

Software Support

Access to technical support services is available exclusively for registered customers with a response time normally within 48 hours. Free technical support is given upon registration for a period of 3 months from receipt of your completed Registration form.

Ongoing technical support can be obtained by completing a Registration & Software Support Contract Application which gives an improved response time. All customers purchasing a Software Support Contract will also receive free upgrades as soon as new releases become available.

Please Note - We cannot provide support (free or otherwise) unless we have

Disposal List - Reports on all disposed objects currently held on the system.

Full Object List - Detailed listing of all objects in the Collate database.

Summary Object List - Summary listing of all objects in the Collate database.

Valuation List - Lists the current valuations for all objects in the Collate database.

User Database Reports - Produces lists of information held in the following databases - Categories, Makers, Materials, Techniques and Types.

Slideshow

Collate has its own in-built Slideshow routine and is accessed via the three Slideshow menu options. The hub of the Slideshow is the Slideshow Control Panel. This is the window that you run all Slideshows from. Whichever way you create a Slideshow you must return to the Slideshow Control Panel in order to display the chosen Images.

Run a Slideshow

To open the Slideshow Control Panel select '*Slideshow - Run*'. This will open the '*Control Panel*' window. On the left of this window is a list of all Images which have been placed into Collate. To the right is the list of chosen Images which can be played using the '*Play*' button.

To run a Slideshow on an ad-hoc basis, select Images from the left hand list and, by dragging & dropping, place them into the right hand list. Set the display time per Image by dragging the pointer to the desired position and select the '*Play*' button. The chosen Images will be displayed continually until you double click the screen which will return you to the Control Panel. If you have set Password protection on leaving a Slideshow, you will be asked to enter correctly it before Collate will return you to the Control Panel.

This is the simplest way of running Slideshows, but you cannot save a Play List using this window.

To remove an Image from the Play List double click the Image name.

Design a Slideshow

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IMPORTANT SECURITY NOTICE

For your own protection

Due to the confidential nature of the information recorded by this product you are strongly advised not to allow anyone to make or use copies of this software product.

Furthermore we are continually developing COLLATE and some of the additional features will require use of the reference numbers which are recorded by us as unique to you. If two people use the same software we may inadvertently disclose private information to the wrong person.

Welcome to Collate™ Version 1.3

Welcome to Collate™ from Softique® for Windows 95, Windows 98 and Windows NT. Collate is a powerful but easy to use relational database application written specifically for collectors of Art, Antiques and Collectables. It enables you to record details of all objects you collect including physical details, purchase details, sale & insurance values, invoice & valuation documents, photographic evidence, general notes and reference work details.

About this manual

This manual provides details to help you get started with Collate. It covers the basic terms and concepts you need to know to use Collate.

The manual assumes you know how to work in the Microsoft® Windows 95™ environment and that you are familiar with the basic techniques such as clicking and dragging. If you need help with Windows please see your Windows User's Guide.

Online Help



Collate comes with a comprehensive online Help system. You can use the Collate Help system to get information quickly while working in Collate.

You can search for topics in the Help system, and in many places click an icon or text to go to a page with related information. Once you are familiar with Collate, you may find the Help system the quickest and easiest means of getting the information you need.

To open the Help system, choose an option from the Help menu.

Conventions

In this manual and in the online Help, the terms *click*, *double-click*, and *drag* refer to the left mouse button unless the right hand mouse button is specified.

button which will abandon any changes you have made to this object.



Searching for an Object

To search for objects which match certain criteria *select Search - Search*. This will open the search window. For *Title, Type, Category, Material, Maker, Technique, Date, Description, Reference Number, Subject, Security Tag, Inscriptions, Markings and Distinguishing Features* you can type or select details for as many fields as you need.

You may also search using the '*Location*' and '*Provenance*' fields and by using the Images '*Next*' and '*Previous*' buttons you can find an Object by finding the appropriate Image for the Object.

If no objects match the criteria a message box will appear saying that no matches were found. If there are objects matching the criteria another window will open showing a list of all matching objects.

If you highlight an object from the list you can select '*View*' to go straight to the object. By selecting the '*Search*' button you can go back to the '*Search*' window and make further searches. Alternatively you can finish searching by selecting the '*Exit*' button.

Reports



Valuation Grid

The Valuation Grid Is an alternative way to view the valuations which have been entered into Collate.

The difference here is that you can see the Valuations of all Objects. The Valuations are displayed in table format, and you can sort the columns into ascending or descending order.

To sort a column in ascending order click a columns '*Title Bar*' once, to sort the column in descending order click the column heading again.

By clicking different columns you can show the Valuations in a variety of ways.

Reports

It is important to enter the purchase (or acquisition) details of the Object as soon as possible. Enter who you bought the Object from and if bought at auction enter the price including any premium. Also add any comments you feel are relevant.

Similarly, and equally important, enter the disposal details in the same manner. For Objects sold at auction enter the amount after commission (i.e. the amount you received). If disposal was by settlement of an insurance claim enter the amount received from the Insurers.

By entering information in the disposal fields the object will not be included in any reports that list only currently owned objects. The object will, however, remain in the database until you delete it using the *'Delete'* button on the right hand of the window.

Use the location section to enter details of the current location for the object. You may also use this section to give the location in your house or whether the object is being stored at your bank for safe keeping, but to do this you must enter the location as an Address in the Address Book section of User Databases.

For information on setting up Databases see User Database section.



Amending an Object (Open Object)

Amending an Object which has already been entered into Collate follows the same format as when entering the details of a new Object. To get the object on-screen select *'File - Open Object'* from the Main Window or *'Reselect'* if you are already viewing another Object.

This will open the *'Select an Object'* window. On the left of this screen is a list which is used to narrow down the search for the Object that you wish to amend.

With the *'All Objects'* line highlighted the list on the right shows all Objects in the collection. To reduce the number of Objects in the list on the right double-click the appropriate sub-set from the list on the left.

From the list on the right you may now select the particular Object you wish to amend and by clicking the *'Select'* button that Object will open for amendment.

To change any information about this object you select the *'Edit'* button at the bottom right of the screen.

When you have finished making the amendments select the *'Save'* button on the right of the screen to make the changes permanent. If you have made a mistake and wish to revert to the previous object details select the *'Exit'*

Installing Collate

Before you begin

Before installing Collate, check to see that you have the correct equipment and operating system.

System Requirements

This is what you'll need to run Collate:

- A Pentium P60 or compatible PC with a hard drive and a CD-ROM drive.
- At least 8 megabytes (MB) of random access memory (RAM) (16MB is recommended)
- A colour SVGA monitor (800 x 600) displaying a minimum of 256 Colours
- At least 20MB of available hard disk space
- A mouse or other pointing device
- Microsoft Windows 95, 98 or NT operating system

Installing Collate

You can only install Collate on a standalone computer.

To install Collate:

1. Insert the CD into the CD-ROM drive.
2. From the Start menu select *'Settings - Control Panel'*. Double Click *'Add/Remove'* Programs. Click Install. Click *Next*, and with Setup.exe showing in the window click *Finish*.
3. Follow the instructions on the screen to install the program.

The Collate installation program guides you through the process. Click the next button whenever you are ready to go on to the next set of instructions and enter your Serial Number when requested to do so (*also see Serial Number over*).

Collate tells you when installation is complete.

Serial Number

Your Serial Number is printed on the back of your CD case. This number is specific to the CD it comes with, and you will need to quote it when contacting us for Technical Support. You will be asked to type this number in whilst installing Collate. Once entered the number can also be found by viewing the *About Collate* menu option.

Registering Collate

Now that you have installed Collate please make sure that you return the enclosed Registration & Support form immediately. *We are unable to provide support (free or otherwise) until we have received your registration form.*

Screen Resolution

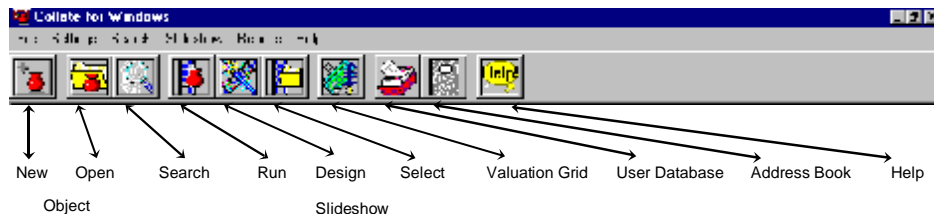
Collate has been designed to show the whole screen at a resolution of 800 x 600. If Collate does not fit into a whole screen your resolution needs changing.

Refer to your Windows manual for details on changing screen resolution.

Screen Colours

Collate should be run using a minimum of 256 colours.

Refer to your Windows manual for details on changing the number of colours used.



Collate Main Menu

For Valuations obtained from Auction sale prices it is suggested you enter the Realised or Hammer price achieved by the Auctioneer. There is also space for you to enter the amount of the Upper and Lower Estimates as catalogued by the Auctioneer.

To edit a Valuation, first select the '*Valuation Type*'. Next select the '*Edit*' button which will allow changes to be made. When you have finished amending the Valuation select the '*Save*' button to save the amended valuation.

Editing a Valuation should only be done if you incorrectly entered the Valuation. If you are updating with a new Valuation select '*New*' and enter the details.

Bibliography

Viewing Bibliographies

This window will not show any Bibliography details until you have entered a Bibliography for the Object and is used for viewing only. The details in it cannot be edited or amended.

You can also choose to view the Bibliographies using a general layout or the Harvard Referencing System layout.

Adding or Editing Bibliographies

To add a Bibliography select the '*Bibliography*' button.

Start by selecting the '*New*' button and choosing a '*Literature Type*'. Enter the details of the Bibliography and select '*Save*' to save the Bibliography.

To edit a Bibliography, first select the '*Literature Type*'. Next select the '*Edit*' button which will allow changes to be made. Edit the Bibliography and select '*Save*' to save the amended Bibliography.

Provenance

To enter details of the previous ownership or history for the object type in Provenance box. The window will scroll to accommodate the length of your text. Any editing is done by directly amending the text in this box.

Other

Any Image being shown on-screen can be viewed in greater detail by double-clicking within it. When you have finished viewing the large Image double-clicking within it will return you to the 'Images' Tab.

Adding and Deleting Images

To add a new Image to the Object select the 'Add Image' button. This will open the 'Open' window for you to locate the Image to be added for this Object. Highlight the Image you require and select the 'Open' button. Enter the description in the box underneath the Image. The selected Image is now available for viewing by using the 'Next' or 'Previous' buttons.

To delete an Image from this Object select the 'Delete Image' button. This will open a selection window listing all Images associated with this Object. Highlight the Image you wish to delete and select the 'Delete' button. You will need to confirm deletion when the next window opens.

Valuations

Viewing Valuations

The window on the left will not show any valuation details until you have entered a Valuation for the Object and is used for viewing only. The details in it cannot be edited or amended. Three types of valuation can be entered and viewed for an Object; Auction, Insurance and Market Valuations. Select the Valuation Type you wish to view by clicking the appropriate Valuation Type.

Adding or Editing Valuations

To add a Valuation select the 'Valuations' button.

This will open the 'Add/View Valuations' window. In this window you can enter details for the three types of valuation: Insurance, Auction or Market valuations. To add start by selecting the 'New' button, and then select the type of valuation you will be entering.

Select the name of the Valuer, Auctioneer or Dealer from the drop down list. If the name you require is not in the list you will need to add it. See *Setup - User Databases in the Setting up Collate section*. You should add new Contacts to the Address Book as some reports generated by Collate will print out the full name and address details.

Enter the Valuation details and add any comments you wish to make. You are free to use the comments box as you wish. When you have entered the details select the 'Save' button to save the Valuation.



Configuring Collate

It is a good idea to configure Collate before entering any Objects, although alterations to the sections listed below can be made at any time. Take some time to read the 'Getting started' manual before configuring Collate for the Objects you collect. A little thought and effort spent at this time could save you the heartache of having to amend each Object at a later date.

To configure Collate for your collection select the 'Settings' menu.

User Database

From the Main Menu. Select 'Settings - User Database'.

You can configure Collate to list information that you will use regularly. It is best to set these sections up before entering any objects, however they can be added to or amended at any time. You can create lists of *Categories, Types, Makers, Materials and Techniques*.

You are free to use the User databases in whichever way you feel most appropriate to your collection. Listed below are some examples of how to use each database and how to enter information into them.

Categories

Use this section to enter the Categories of Objects you collect. Furniture, 20th Century Decorative Arts, Lalique and Silver are examples of Categories.

With the User Database window open select the 'Categories Tab'. The left hand window shows all Categories already entered into the database. To add a new Category select 'Add' and enter the details in the 'Enter a new category' box.

You can also edit and delete Categories by highlighting the Category in the 'Currently available' window and selecting the appropriate button.

Types

Use this section to enter the Types of Objects you collect. Books, Clocks and Lithographs are examples of Types. A type is a description of what the Object is.

With the User Database window open select the *'Types' Tab*. The left hand window shows all Types already entered into the database. To add a new Type select *'Add'* and enter the details in the *'Enter a new type'* box.

You can also edit and delete Types by highlighting the Type in the *'Currently available'* window and selecting the appropriate button.

Makers

Use this section to enter the Makers of the Objects you collect. Doulton, Picasso, and MacIntosh are examples of Makers. A Maker is the Company, Person or Artist that made the Object.

With the User Database window open select the *'Makers' Tab*. The left hand window shows all Makers already entered into the database. To add a new Maker select *'Add'* and enter the details in the *'Enter a new maker'* box.

You can also edit and delete Makers by highlighting the Maker in the *'Currently available'* window and selecting the appropriate button.

Materials

Use this section to enter the Materials used to make the Objects you collect. Silver, Silver Plate and Porcelain are examples of Materials.

With the User Database window open select the *'Materials' Tab*. The left hand window shows all Materials already entered into the database. To add a new Material select *'Add'* and enter the details in the *'Enter a new material'* box.

You can also edit and delete Types by 'highlighting' the Material in the *'Currently available'* window and selecting the appropriate button.

Enter information for each field by selecting data from the drop down list boxes or by entering text freehand, include a description for the subject depicted on the object.

For information on setting up the Category, Type, Maker, Materials & Technique Databases see the Presets section of this Manual.

Features

Enter details of any Distinguishing Features and Inscriptions & Markings for the object making particular note of the Objects condition and detail any restoration work which has taken place. This information is important as it will be unique to the Object and will help to prove ownership should the need arise. It is also useful to photograph these areas of the Object.

Dimensions

Use this Tab to enter the physical size and weight of the Object. The measurements can be entered in any Units and do not need to be in either all Metric or all Imperial.

Images

Using Collate is an excellent way of recording photographic information, Written Valuations or Receipts for each object. This is done by assigning digital images to the object. You can add as many Images for each object as you wish.

In order for Collate to use Images they must first be digitised and put into the computer. This can be done in a number of ways but the most common are to scan the photo using a digital scanner or alternatively buy taking photos with a Digital Camera.

All Images can be viewed using the Slideshow routine.

Images files must be saved to your Hard Disk before they can be used and must be in either *.BMP, *.GIF, *.JPG or *.WMF file formats.

Viewing Images & Documents

You will notice that there is space to view two images at a time. By using the *'Next'* and *'Previous'* button next to each image you can view any image for this object in either window. By using Collate in this way it is possible to view three images of the object at one time (the thumbnail plus two selected images).



Adding an Object (New Object)

From the Main Menu. Select '*File - New Object*'.

Upper Window

The upper half of the window contains information which is always visible whilst information in the lower half changes depending upon which tab you select.

Complete the upper section with a Title (each object should have a Title) and a general description. Bear in mind other sections will give you the opportunity to enter more specific information. Also enter a unique reference number (if you already reference your objects) or let Collate enter a unique number for you. The box on the right of this section will contain a thumbnail image of the Object when one has been entered.

Any Objects which do not have an Image assigned to them will show the default Collate thumbnail Image. See *Images Section* for further details on entering Images.

Lower Window

Complete as much information as you can in the lower section as this will mean you have described the object fully. Any unknown information can be added at a later date.

Function Buttons

On the right hand side of the lower window are a series of '*function*' buttons. Not all of these will be available for use at any one time, but will become available for use when appropriate to the task you are performing. The buttons will enable you to enter a '*New Object*' or '*Reselect*' another Object. You may also '*Edit*', '*Save*' or '*Delete*' the current Object, or '*Exit*' the Object Viewer window.

Detail Tabs

Further Information

Techniques

Use this section to enter the Techniques used to make the Objects you collect. Moulded, Hammered and Slip cast are examples of Techniques.

With the User Database window open select the '*Techniques*' Tab. The left hand window shows all Techniques already entered into the database. To add a new Technique select '*Add*' and enter the details in the '*Enter a new technique*' box.

You can also edit and delete Types by highlighting the Technique in the '*Currently available*' window and selecting the appropriate button.



Address Book

Select '*Settings - Address Book*'.

User

Collate needs to know your Personal details so that it can enter the relevant information on various Reports.

With the Address Book window open, select '*User*' Tab.

Select the '*Edit*' button and enter your Personal details. Select the '*Save*' button to save your Personal details.

Other

Use this section to enter the Addresses of people or Businesses you deal with when buying, selling or Insuring the Objects you collect. You can also enter Addresses for fellow Collectors.

With the Address Book window open, select '*Other*' Tab.

This tab is different from the User tab as it contains more information. To add a new Address select '*New*' and enter the Address details in the boxes provided. For each person or Business entered you can select as many or as few of the '*Contact Type*' tick boxes as you wish.

When marking an Address as an Insurer the Policy Number & Renewal Date boxes become available for you to enter those details. If you have more than one Insurer do the same for each Insurer, You can select the appropriate Insurance Policy Number from the list when entering the Object details - Further Information tab. See the *'Adding an Object'* or *'Amending an Object'* sections for further information.

You can find Addresses already in the Address Book by using the *'Next'* or *'Previous'* buttons. You may also delete Addresses by selecting the Address you wish to delete and selecting the *'Delete'* button.

Contact List

With the Address Book window open, select *'Contact List'* Tab.

A faster way to find the Address of a Contact is by using the Contact List. This tab gives a complete list of the Contacts already in the Address Book. Select the Contact you require and double click it to open the *'Other'* tab where that Contacts Address details will be displayed for Viewing, Editing or Deleting.

Setup & Utilities

Database

Select *'Settings - Setup & Utilities - Database'*

The Database Tab is split into two sections. The top section shows the Path of the Collate database. This can be changed by selecting the *'Change'* button. This opens the Collate Databases window where you can select the location for the Database. Highlight the file you require and select the *'Open'* button.

The lower section shows the path of the Backup Database, The details here show the Path for the Backup Database. If you wish to choose a different Backup location select the *'Select Location'* button. This will open the Collate Databases window where you can select the location for the Backup Database. Highlight the file you require and select the *'Open'* button.

Also available in the lower section is the *'Backup'* button. Select *this button* to make a Backup copy of the Collate Database. If a Backup file already exists Collate will ask if you wish to overwrite it. Select *'Yes'* to overwrite the existing Backup Database or *'No'* to cancel the Backup.

Password

Select *'Settings - Setup & Utilities - Password'*

For your own protection the use of passwords is strongly recommended. When choosing a password try and use a word that is likely to be known only to you. Once entered the password must be entered every time you start Collate. The password is also needed when exiting from the Slideshow. If chosen, this prevents unauthorised access to other parts of Collate.

At installation Collate does not have a Password set. To enter a Password for Collate select the *'Change Password Settings'* button. You can also choose whether the Password is required when exiting the Slideshow by marking the checkbox. If you do not need a Password to be entered to exit the Slideshow leave the box unchecked.

To add or change a Password select the *'Change Password'* button. You will now be asked to enter the New Password. Enter a Password up to 30 characters in length and select *'OK'*. The password you type will not be displayed on screen but will be replaced by the corresponding number of stars (****). Next you will be asked to confirm the Password by re-entering the same Password again. You must re-type the Password correctly for the new Password to be accepted by Collate.

Subsequent changes to the Password will require you to enter the existing Password first, before entering the new Password as described above.

Start-up

Select *'Settings - Setup & Utilities - Startup'*

Collate can produce two Reports automatically each time it starts up. The Reports highlight Objects with out of date Insurance Valuations and Objects where certain information has not been entered. The Reports are designed to ensure your Object details are kept up to date and are complete.

To have these Reports produced automatically mark the respective checkbox and enter the regularity with which you wish to update Insurance Valuations.

For reports you do not wish to be produced automatically when Collate starts up leave the boxes unchecked.