

CHAPTER 1: SYSTEM BASICS

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CHAPTER 1: SYSTEM BASICS

A. Overview

1. *When should I read this chapter?* Read this chapter after you've read the Introduction, and after you've installed the software (see the on-disc instructions or Appendix B: Installation and Setup to install the software). You will learn more from this chapter if you can follow along on your computer.
2. *What is the purpose of this chapter?* Use this chapter to familiarize yourself with the system basics of **ICMS**. The information presented here will help you learn to navigate through **ICMS**. After you start working in the program, use this chapter as a quick reference on system basics.

B. Getting Started

1. *How do I start the program?* From your Windows desktop:

- Double-click the Re:discovery icon **Re:**

Or follow these steps:

- Single-click on the Start button in the bottom left corner of the screen to bring up the start menu.
- Point to All Programs on the Start menu. When you highlight All Programs, the Programs menu opens.
- Highlight the **Re:discovery ICMS** folder on the Programs menu.
- Single-click on the **Re:discovery ICMS** icon.

The Login window opens. Enter your User ID. Press Tab to move to the Password field and enter your password. Press Enter or click on the Login button to start the program.



2. *What if I don't have a User ID and password?*

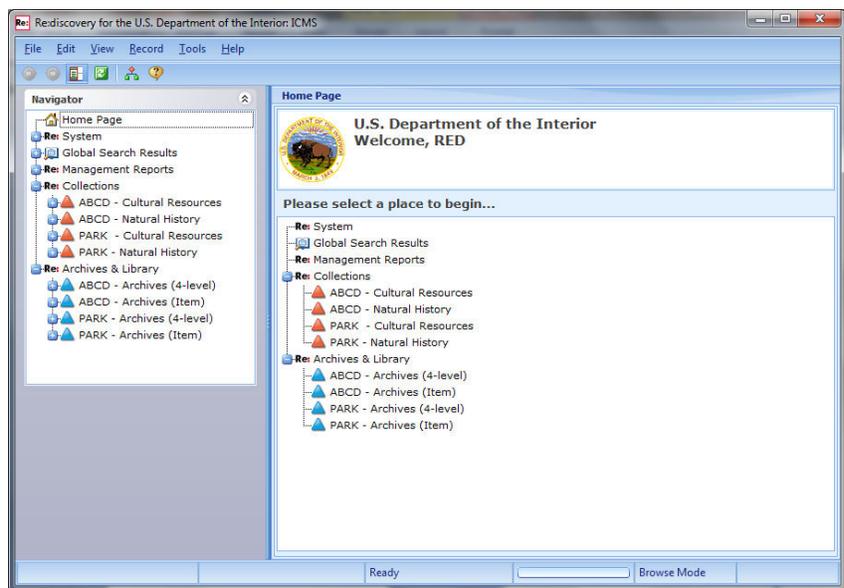
If you don't have a user ID and password, stop and return to:

- Appendix B: Installation and Setup, *or*
- Chapter 9, Section VI, User Security, to set up a user ID, *or*
- your system administrator who will assign you a user ID and password

If you have forgotten your password, see your **ICMS** system administrator. If you need further help, call for support. See Appendix K: Support.

3. *What is the Home Page?*

The Home Page opens the first time you log in to **ICMS**. It shows the program's modules and directories in a "tree". Use the arrow keys and the Enter key, or double-click the mouse in the Home Page, to select the option you want to use. Click the blue + buttons to expand an option and view sub-options within it.



All units have the:

- Collections Module (This contains your cultural resources and natural history catalog records. It also contains associated modules that assist you with collections management functions.)
- Archives Module (This contains screens for describing archival collections.)
- Management Reports Module (This contains the Automated Checklist and Collections Management Report modules.)

4. *What if I don't have any Collection or Archive directories in ICMS?*

If you have just installed ICMS for the first time, you must create one or more directories so you can enter your catalog data.

Note: You must have Administrator rights to create directories. If you do not have sufficient rights to create directories, contact your **ICMS** system administrator.

To create a directory:

- from the Tools menu, choose Create New Directory. The Create New Directory window opens.
- Enter a 3-5 character directory name, usually your unit acronym.
- Select a Directory Type. Check the box for “Use DOI or NPS Center Model Directory” to create a standard DOI directory. If you do not use a DOI or NPS Center model directory, a standard NPS directory will be created.

Re: Create New Directory

Create a New Directory

Enter a name for the directory. Select the directory type. Check the box for Use DOI or NPS Center Model Directory to create a standard DOI directory or NPS Center directory. Then click Create Directory.

Directory name: (3 to 5 characters, no spaces or symbols for NPS. Up to 20 characters for DOI)

Directory Type:

- Cultural Resources
- Natural History
- Archives (4-level)
- Archives (Item)

Model Type:

- Cultural Resources - BOR
- Cultural Resources - DOI
- Cultural Resources Center - MRCE
- Cultural Resources Center - MWAC
- Cultural Resources Center - SEAC
- Cultural Resources Center - WACC

Use DOI or NPS Center Model Directory

Create Directory Cancel

DOI directories use an unformatted catalog and accession number, which allows any numbering format for all bureaus. NPS directories use the standard NPS 3-part catalog and accession number format. Only NPS Centers will use the NPS Center model directories.

Most units will create at least a Cultural Resources directory. Many units will also create a Natural History directory.

Click the Create Directory link to create the directory. Your new directory will appear under Collections or Archives in the Navigator.

5. *How do I get to the Collections Module?*

To get to the collections module:

- from the Home Page, double-click on the icon for a Collections directory, such as Cultural Resources or Natural History, *or*
- use your arrow keys to cursor to a Collections directory, such as Cultural Resources or Natural History, and press the Enter key

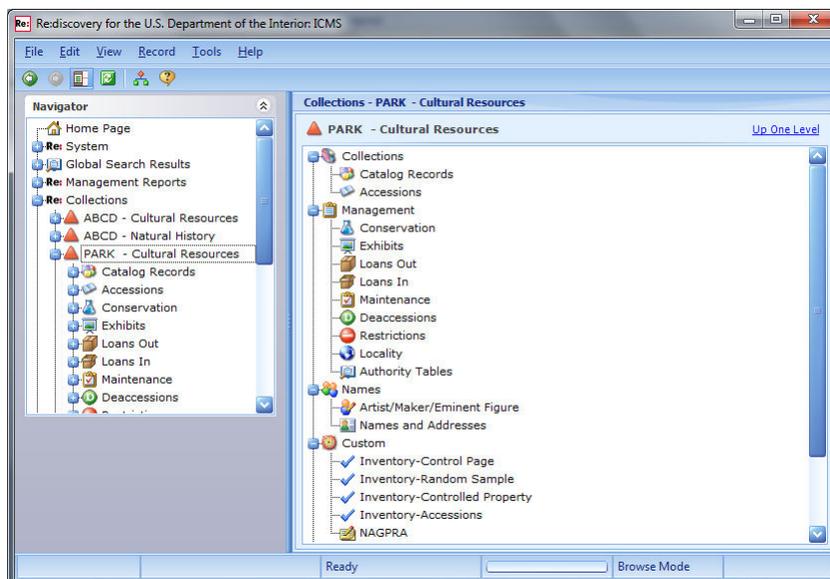
Note: If you are using the Navigation Pane, you only need to single-click a selection to open it.

The Directory Page opens.

Collections Directory Page

The Directory Page includes the collections records, utilities, and associated modules for the directory you chose.

The Collections directory page will look something like this:



Note: In this manual, the acronym “PARK” is used to indicate any unit. When you use ICMS, your unit acronym will appear in place of “PARK”.

From the Directory Page double-click “Catalog Records”, or use the arrow keys to select “Catalog Records” and press the Enter key.

The Catalog Record page opens. You will see the first screen of data for your first catalog record. The default sort order is by catalog number, so you will see the record with the lowest catalog number in the directory. A cultural resources directory contains history, archeology, ethnology and archival records. A natural history directory contains biology, geology and paleontology records.

Some of the options in ICMS are security protected. To access these options, you must have the correct security rights assigned to your User ID. If you do not have the correct security rights, the option will be unavailable. For more information on security rights, see Chapter 9, Section VI, User Security.

6. *How do I move through the database and look at the other records?*

There are many options and functions available to move through the program. You need to find the ways that work best for you. Start by looking at the different parts of the screen that are described in the following sections.

Go to question B.9 to begin learning how to navigate and use ICMS.

7. *How do I get to the Archives Module?*

To get to the archives module:

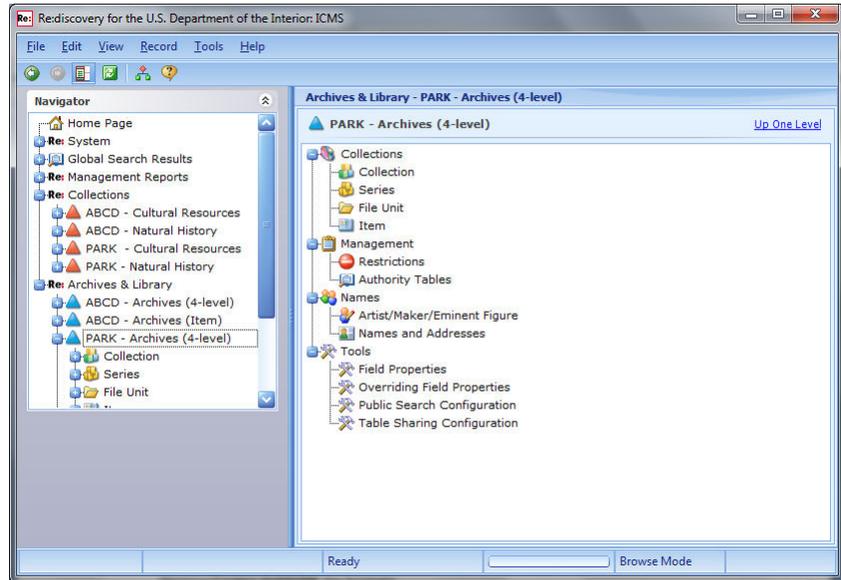
- single-click on the icon for an Archives directory, such as Archives or Item Level Archives, *or*
- use your arrow keys to cursor to an Archives directory, such as Archives or Item Level Archives, and press the Enter key

The Directory Page opens.

Archives Directory Page

The Directory Page includes the collections records, utilities, and associated modules for the directory you chose. An archives directory contains hierarchically organized records. An item level archives directory contains records for archival items cataloged only at the item level.

The Archives directory page will look something like this:



From the Directory Page double-click "Collection", or use the arrow keys to select "Collection" and press the Enter key.

The Collection page opens. You will see the first screen of data for your first archival collection record.

8. ***Can I use the Archives Module if I don't have archival expertise?***

Yes. However, the module is intended for use by DOI or contract staff with experience in describing archival collections. You must fully catalog an archival collection in the Collections Module. Once you have a catalog record for the collection, you can choose at any time to transfer the data to the Archives Module.

9. ***How do I exit the program?***

To exit the program:

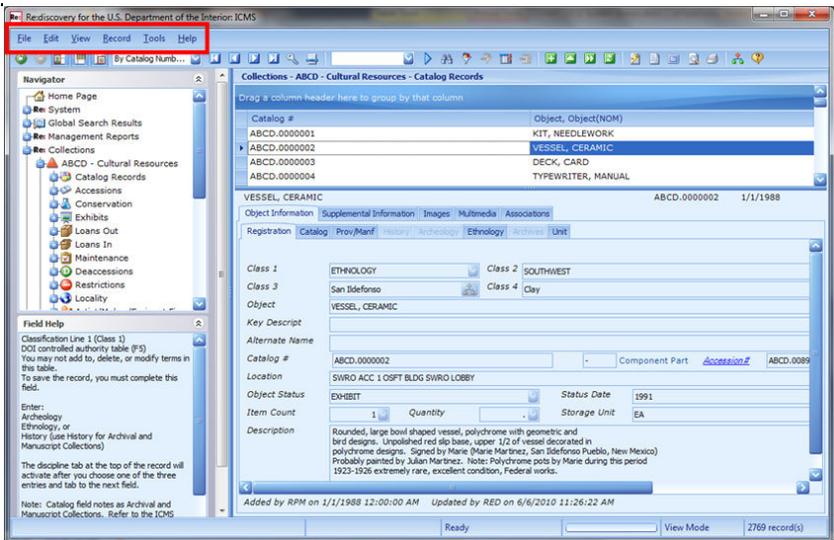
- single-click on the Exit icon  or
- press Alt-F to open the File menu, then use your arrow keys to cursor down to Exit and press the Enter key

10. ***What are the main parts of the ICMS window?***

The **ICMS** window has the following main parts:

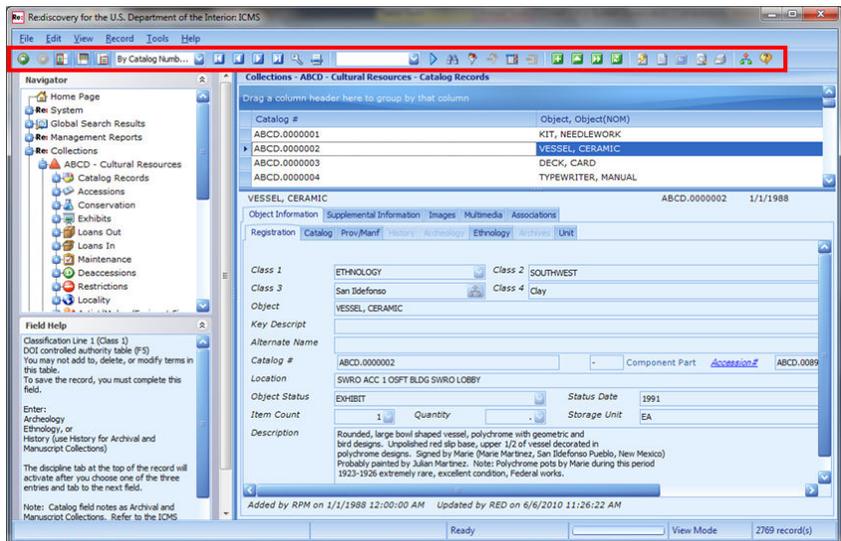
Menu Bar

The menu bar is at the top of the window. It includes all the commands and functions for working with **ICMS**. For more information on the menu bar, see Section C. Menu Bar.



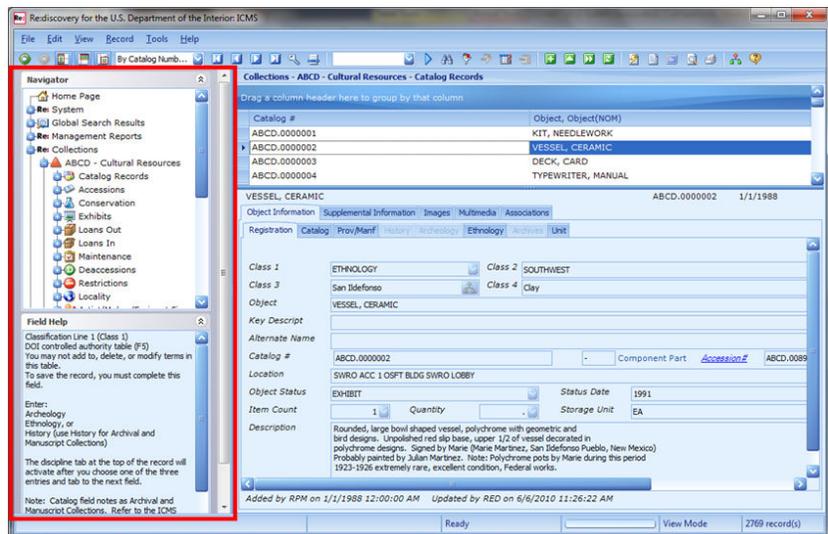
Button Bar

The button bar is below the menu bar. It includes the most frequently used commands and functions. For more information on the button bar, see Section D. Button Bar.



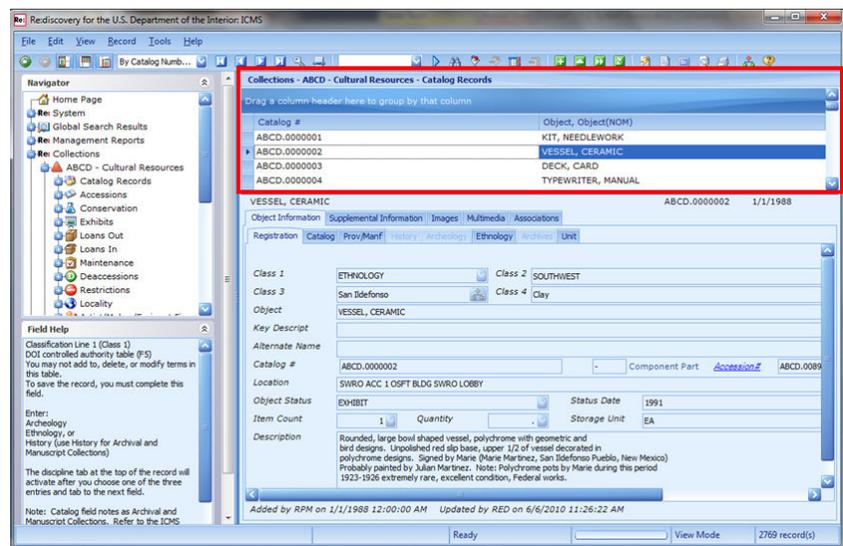
Navigation Pane

The navigation pane is on the left side of the window. It includes the Navigator, Field Help, and Quick Actions. You can hide any of these options by using View, Navigation Pane Options. You can hide the entire navigation pane by clicking the  icon in the button bar, or by choosing View, Navigation Pane, from the menu bar.



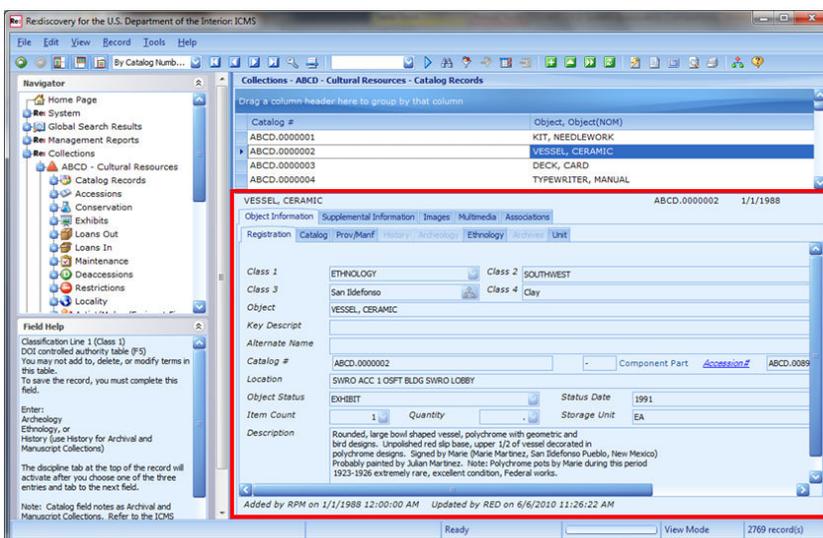
List Pane

The list pane is below the button bar. It shows the list of visible records. You can sort (i.e. organize) the records in the list by using the Sort option, or by clicking the column headers (“quick sort”) in the list pane. You can hide the entire list pane by clicking the  icon on the button bar, or by choosing View, List Pane, from the menu bar.



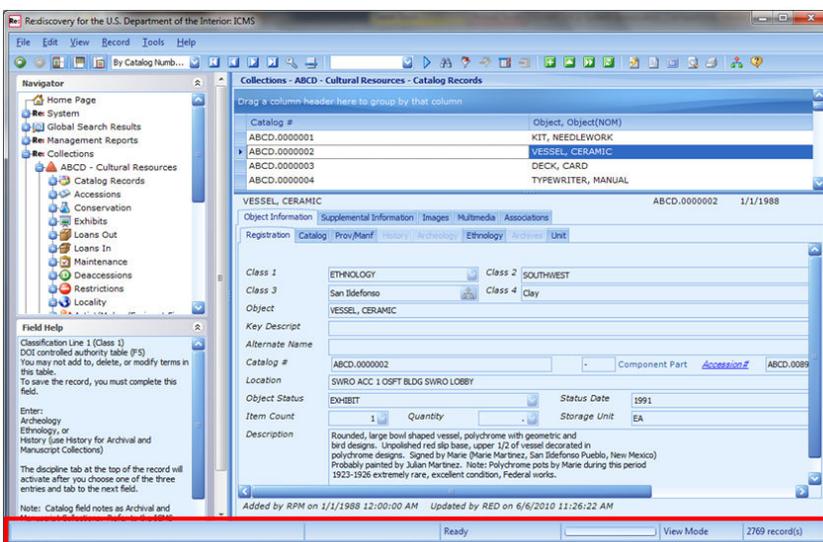
Record Pane

The record pane shows the record you are currently working with. It will have different fields and different layout, depending on which module or associated module you are using.



Status Bar

The status bar is at the bottom of the window. It shows the number of records in your visible data, the current mode of operation, and whether you are using an active tag or filter. It also includes a progress meter, to indicate when the system is working on a task.



C. Menu Bar

1. *What is the purpose of the menu bar across the top of the screen?*
2. *How do I access the functions on the menu bar?*

The menu bar is one way for you to access the many functions of ICMS.

Press Alt and the first letter of the word on the menu bar to see a pull-down menu of choices for that selection. If you continue to hold the Alt key after pressing the menu letter, you can then press the underlined letter of the function you want to choose on that menu. Or single-click on the function you want, or use your arrow keys to highlight a choice and press the Enter key.

To go to another menu, release the Alt key and then press Alt and the first letter of the next menu you want to view. With a menu expanded, you can also press the right or left arrow key to open another menu.

Note: You must be in the View Mode to access some of the functions on the menu bar. The current mode is shown on the status bar in the bottom right corner of the screen. Refer to Section F of this chapter for additional information about modes.

Following is a list of the menu bar commands and a brief explanation of them. Many of these commands are described in greater detail in other parts of this manual.

Some of the options in ICMS are security protected. To access these options, you must have the correct security rights assigned to your User ID. If you do not have the correct security rights, the option will be inactive. For more information on security rights, read Chapter 9, Section VI, User Security.

3. *What options appear under File on the menu bar?*

The File menu includes functions for using or creating computer files with **ICMS**.

Import/Export

Use this option to import data into the program, or export data from the program. You can import or export selected data fields, using an ASCII delimited file format. You can also export data directly to files in these formats: Excel, HTML, PDF, text, or XML. See Chapter 8, Sections III and IV, for more information on import/export.

Print Preview

Use this option to preview what will print with the Print List option.

Print List

Use this option to print the list of visible data. The fields and records included in the printout will match those in the List Pane.

Launch E-mail

Use this option to start your computer's e-mail program.

Backup Data

Use this option to backup your data files, including backups for your annual National Catalog submission. See Chapter 9, Section II for more information on backup.

Restore Full System Backup

Use this option to restore a complete system backup zip file. This option is used for restoring a system after a computer crash or to move the data to a new computer. See Chapter 9, Section III, for more information on restoring a full system backup.

Data Updates (formerly laptop copy)

Use this option to copy records to or from a laptop computer. See Chapter 8, Section V, for more information on laptop copy.

Load to Empty Directory

Use this option to load data you receive from another **ICMS** user, such as a contract cataloger, cooperator, or a Center. You must create a new empty directory to use this option. See Chapter 8, Section VI, for more information on loading data.

Transfer

Use this option to transfer (copy) records from one directory to another, or to copy records to a file. See Chapter 8, Sections I and II, for more information on transfer.

<i>Log on as different user</i>	Use this option to log into ICMS with a different User ID.
<i>Exit</i>	Use this option to exit the program.
4. <i>What options appear under Edit on the menu bar?</i>	The Edit menu includes options for adding or changing data.
<i>Undo</i>	Use this option to undo the most recent typing or deleting that you just did while adding, modifying or copying a record. Note: This is only available during the same add, modify or copy session. Once the record is saved, the Undo will no longer reverse the typing.
<i>Cut</i>	Use this option to cut the selected text from a record. Note: You must be in Add, Modify, or Copy mode to remove text from a record. The current mode is shown on the status bar in the bottom right corner of the screen. Refer to Section F of this chapter for additional information about modes.
<i>Copy</i>	Use this option to copy the selected text, so you can paste it in another location. Copied text is held in the Windows "clipboard". You can paste the text into a Word document, e-mail, etc.
<i>Copy/Append</i>	Use this option to copy selected text from more than one ICMS field. After selecting and copying one piece of text, select another piece of text and use Copy/Append. Both pieces of text are held in the Windows clipboard, waiting for you to paste them.
<i>Paste</i>	Use this option to Paste the text you've copied to the Windows clipboard.
<i>Select All</i>	Use this option to quickly highlight all the text in a single field.
<i>Add New Record</i>	Use this option to create a new record. Add creates a new blank record and places you in Add Mode. In the Collections module, the last acronym that was used for the catalog and accession number will appear on the record. After you save the new record, the program returns to Menu Mode. For more information on adding or modifying catalog records, see Chapter 2, Cataloging.
<i>Copy This Record</i>	This option allows you to make an exact copy of the record currently displayed on the screen and then to edit the new record. You cannot save the copy unless you change the catalog number. This option places you in Copy Mode, so that you can modify the catalog number and any other fields.
<i>Modify This Record</i>	Use this option to modify the contents of the record currently on the screen. You may change previously entered data or enter new information. This option places you in Modify Mode.
<i>Delete Record(s)</i>	Use this option to delete one or more selected records from the database. You can delete the record that is currently on the screen by choosing "Delete This Record." You can delete a group of records by choosing "Delete Multiple Records." Use caution when using this option.

Note: Delete permanently removes the record from the database without any recovery options. Make sure you have reliable backups of your data before deleting records.

<i>Refresh</i>	Use this option to refresh the screen if other users have modified the record since you began to view it.
<i>Defaults & Carry Over Fields</i>	Use this option to set default values and carry over values to help you quickly add new records that are similar. Using defaults can eliminate repetitive data entry. You can set defaults for the entire system and set unique defaults for every person who enters data. For example, a cataloger entering data on magazines and a cataloger entering data on silverware can set unique defaults. See Chapter 6, Section VII, for more information on Defaults.
<i>Macros</i>	Use this option to assign a keystroke or double-key combination to a series of actions that you perform frequently. When you type the assigned keystroke, the program performs the action. You can keep macros for one data-entry session or save them for repeated use. See Chapter 6, Section VIII, for more information on Macros.
<i>Mass Supplemental Update</i>	Use this option to mass-update the supplemental data for a group of records. You can attach a group of catalog records to an Exhibit record, or a Loan Out record. You can update or add appraisal information for many records at the same time. See Chapter 3, Section I.E., for more information.
<i>Modify All Records</i>	Use this option to modify multiple records. You can update the contents of one, or many fields, in a group of records. Modify All will replace the current data in the field with the new data you specify. You can also append data to the end of the existing data in a field. See Chapter 6, Section III, for more information on Modify All Records.
<i>Mass Association Records Update</i>	Use this option to attach multiple catalog records from one directory to an association (grouping) of similar catalog records including those in different directories and modules. You can associate items of similar subject matter, similar origin or other commonality. For example, if you have catalog records in a Cultural Resources directory and a Natural History directory that were collected by the same individual, you can create an association between them. See Chapter 6, Section IX, for more information on Associate Records.
<i>Global Search and Replace</i>	Use this option to seek and correct specific data, such as a string of characters or a frequently misspelled word. You can search all fields, or a specific field. You can replace all instances at once, or view and replace each instance one at a time. See Chapter 6, Section IV, for more information.
<i>Quick Entry</i>	Use this option to edit or add information to a group of selected records in a columnar format, instead of using the data entry screens. This format allows you to choose the fields you wish to edit and move through the fields quickly. See Chapter 6, Section V, for more information on Quick Entry.
<i>Build Exhibit Label</i>	Use this option to build a formula (template) of fields to display in the Exhibit Label field on the Unit tab of selected catalog records. See the Field-by-Field instructions in Chapter 2 for each discipline. You can then use Modify All Records and enter {exhibit label} in the Exhibit Label field to update records

with this label formula. See Chapter 6, Section III, for more information on Modify All Records.

Pre-allocate Records

Use this option to pre-assign catalog numbers to a defined set of empty catalog records. Sites that do a great deal of cataloging, or that use contract catalogers, may use this function. Pre-allocated records will be DRAFT status, and will have the Class 1 discipline that you choose. See Chapter 6, Section VI, for more information on Pre-allocate Records.

Note: Pre-allocate records is a security-protected function. You must have System Administrator security to use this function. It is only available in the NPS-style CR & NH Catalog Records.

Mass Taxonomy Update

Available only in Natural History. Use this function to mass update the Kingdom, Phylum, Class, Order, Family and Sci. Name fields on groups of Biology or Paleontology records from the ITIS database. See Chapter 2, Cataloging (Natural History and Paleontology sections), for more information on Mass Taxonomy Update

MARC

Archives module only. Use this function to create or export MARC records at the Collection level of a 4-level archives directory. See Appendix F, Section M for more information on MARC records.

5. What options appear under View on the menu bar?

The View menu includes options for organizing the **ICMS** screens, using images, and navigating the screens and modules.

Navigation Pane

Use this option to close or open the **ICMS** Navigation Pane. The navigation pane is on the left side of the screen. It includes the Navigator “tree”, Field Help, and Quick Actions. You can use the navigator to go to associated modules such as Accessions, Exhibits, and Loans.

List Pane

Use this option to close or open the List Pane. The list pane is above the record pane. It shows the list of visible records in the current module.

Record Pane

Use this option to close or open the Record Pane. The record pane shows the data you are currently working with.

Navigation Pane Options

Use this option to activate or deactivate the elements within the navigation pane. You can activate or deactivate the Navigator, Field Help, and Quick Actions elements.

Navigation Pane Style

Use this option to change the style of the navigation pane to suit your preference. You can set the style to match the default style of other Windows applications, such as Outlook 2003, Outlook XP, and Windows Explorer XP.

Toolbars

Use this option to activate specialized toolbars. When you activate a toolbar, frequently used functions such as Tag Set Management are available on-screen. You won't have to search the menus to find these functions, because they'll be on the screen as part of the button bar.

Screen Options

Use this option to change the overall style of the **ICMS** window to suit your preference. There are several styles to choose from. See Section L.7 of this chapter, for more information on Screen Options.

<i>Imaging</i>	Use this option to import digital images to your catalog records, and manage those images. You can attach one or more images to each catalog record. For more information on images, read Appendix G, Imaging and Multimedia.
<i>Image(s) View</i>	Use this option to select the image view that suits your preference. You can choose to view images as a Film Strip, Thumbnails, or Slide Show. You can also “dock” the images tab, so that it is always next to your catalog record.
<i>Multimedia</i>	Use this option to activate multimedia clips that are associated with a catalog record. See Appendix G, Imaging and Multimedia, for more information on Multimedia.
<i>Show Images in List Pane</i>	Use this option to include thumbnail images in the List Pane. Any record that has an image attached to it will show that image in the list.
<i>Show Only Records With Images</i>	Use this option to limit the visible data to only those records that have images attached to them.
<i>Update My List View</i>	Use this option to select the fields you want to appear in the List Pane. These fields will appear in the list pane when you choose My List View from the Sort pull-down menu on the button bar or the Record menu.
<i>Use Large Data Navigator</i>	Some units have very large collections and as a result a single table in a directory may contain a large number of records. Use this option to interact with Large Data Sets, so the system only has to load a certain number of records at a time and can work more efficiently. Your visible data is still all records in the system, Tag Set, or filter, but the records are divided into pages and only one page of records is downloaded to the workstation at a time.
<i>Back</i>	Use this option to go back to a screen you viewed previously, such as another module, directory, or associated module.
<i>Forward</i>	Use this option to go forward to a screen you viewed previously, such as another module, directory, or associated module. This option is only active after you have used the Back option.
<i>Next Page</i>	Use this option to view the next page (screen) of data in multi-screen modules.
<i>Previous Page</i>	Use this option to view the previous page (screen) of data in multi-screen modules.
<i>Go To</i>	Use this option to go to any of the associated modules or utilities within the current directory.
6. <i>What options appear under Record on the menu bar?</i>	The Record menu includes options for working with your records. Use these options to find records, move among the records, and print records.
<i>Use Hierarchical Ranges</i>	Archives module only. Use this option to activate/deactivate the use of hierarchical ranges. When active, this option limits the visible data to the records within the same range as the current Collection, Series, or File Unit. When inactive, all records are visible.

View Hierarchical Browse

Archives module only. Use this option to open the Hierarchical Browse window. The window displays Collection, Series, File Unit, and Item level records in a color-coded hierarchy. The window can remain open while you work with records.

Sort

Use this option to organize your records. You can put your records in order by Catalog Number, Location, Object Name, etc. The default sort is by catalog number.

The list of available sort orders changes in the different modules and associated modules. For more information and a complete list of available sort orders, by module, see Chapter 7, Section V.

First Record

Use this option to go to the first record in the visible data, in order by the current Sort. If a filter or tag is active, this option will move to the first record in the filter or tag. This option is inactive if you are on the first record.

Previous Record

Use this option to go to the previous record in your visible data, in order by the current Sort. The previous record is the record directly before the one currently on the screen. If a filter or tag is active, Previous Record will move to the previous record in that filter or tag. This option is inactive if you are on the first record.

Next Record

Use this option to go to the next record in your visible data, in order by the current Sort. The next record is the record directly after the one currently on the screen. If a filter or tag is active, Next Record will move to the next record in the filter or tag. This option is inactive if you are on the last record.

Last Record

Use this option to go to the last record in the visible data, in order by the current Sort. If a filter or tag is active, Last Record will move to the last record in the filter or tag. This option is inactive if you are on the last record.

Find Record

Use this option to find the next occurrence of a specific word or character string in the List Pane. You can search forward or backward in the list. You can search within only one field, or within all fields in the List Pane.

Note: If you are in the Record Pane when you select this function, you must activate a tag set, filter or select multiple records in the list pane. It will then only find the word in that group of records. You can choose to search all fields or only one field.

Get

Use this option to get a specific record, in order by the current Sort. For example, if the records are sorted by catalog number, Get will prompt you to enter a catalog number. After you enter a number, the program will retrieve that record. If the records are sorted by object name, the program will prompt you to enter an object name. The program will retrieve the first record that matches the requested object name.

Advanced Search

Use this option to perform complex searches for words and phrases that occur anywhere in your collection records. For simple searches, enter the word(s) you are looking for in the Quick Search box on the button bar. See below in section D. Button Bar, for more information about Quick Search.

The Advanced Search function in **ICMS** is one of the most powerful features of the program. It is often the quickest and easiest option for finding records.

You can:

- perform Boolean searches using AND, OR, and NOT conditions
- search the current directory, all directories and modules, or specify directories and modules you want the system to search

When you use the search results, the selected records are stored in a tag set.

For detailed information on using Advanced Search, see Chapter 7, Section I.

Advanced Filter

Use this option to limit the visible data to records that match specific field values that you define. For each field, you can choose to find any records that:

- start with your value
- are equal to (the same as) your value
- are not equal to (different than) your value
- are less than or equal to (below) your value
- are greater than or equal to (above) your value
- contain the same character string as your value
- are between a range of values
- are blank, or are not blank

You can save a filter for later use. You can select fields to include in the list view and select the fields to sort by when using the filter.

For more information on Advanced Filter, see Chapter 7, Section II.

Deactivate Filter

Use this option to deactivate an active filter. Your visible data will no longer be limited to records that match the filter.

Tag Set Management

Use this option to manage tag sets. Tag sets are sub-sets of records grouped together for easy reference.

You will create most tag sets by using Quick Search, Advanced Search, and the menu options below. Use Tag Set Management to view the details of tag sets, such as who created them, when they were created, and how many records they contain.

For more information on Tag Sets, refer to Chapter 7, Section III.

Tag sets are static. They reflect the content of the database at the time you created the tag set. New records added to the database after you create a tag set will not automatically appear in the tag set.

Activate a Tag Set

Use this option to select an existing tag set, and activate it. Only the records in the tag set will be visible.

<i>Deactivate Tag Set</i>	Use this option to deactivate an active tag set. Your visible data will no longer be limited to records in the tag set.
<i>Add All Visible to Tag Set</i>	Use this option to add all visible records to an existing tag set, or to create a new tag set that includes all visible records.
<i>Add Selected Item(s) to Tag Set</i>	Use this option to add selected records to an existing tag set, or to create a new tag set that includes only the selected records. You can select multiple records in the List Pane by using the Shift-click and Ctrl-click combinations.
<i>Remove Selected Item(s) from Tag Set</i>	Use this option to remove the selected record(s) from an active tag set.
<i>Build a Tag Set</i>	Use this option to start building a tag set by using any or all methods that are helpful. While building a tag set, the message “Building: Your Tag Set” will appear in the status bar at the bottom of the screen. You can use any of the options described above for adding records to the tag set. When you’ve added all the records you want to the tag set, choose Build Tag Set again to finish.
<i>Create Tag Set of Random Records</i>	Use this option to create a tag set of randomly selected records. You can choose the number of records to include in the tag set, or a percentage of the total number of records.
<i>Reports</i>	<p>Use this option to:</p> <ul style="list-style-type: none"> • run all the required (and many of the optional) DOI and Bureau forms, and NPS forms from the NPS <i>Museum Handbook</i>, Part II (<i>MH-II</i>) • create new report formats using the Proficio Report Designer • use the Quick Report feature to easily create and run reports on your data <p>Note: Proficio Report Designer can produce elaborate report formats. See Chapter 5, Section V, Proficio Reports.</p> <p>For more information on running existing reports and creating quick reports, read Chapter 5, Printing and Reports.</p>
<i>Full View</i>	Use this option to open the Full View window. Full View lets you see all the data in all the fields for a record, in one window. You can print the contents of the window, or save it as a file. See Chapter 5, Printing and Reports.
<i>XML Export</i>	Collections module only. Use this option to export records to an RTF, SGML or XML format using a corresponding RTF, SGML or XML template. You must have an existing custom template to use this feature. Contact Re:discovery Software Inc for information on creating custom templates.
<i>Finding Aid/SGML</i>	Archives module only. The Finding Aid option in the Archives module has been superseded by the new Finding Aid reports available in Proficio Reports. See Chapter 5, Printing and Reports. Note: The old legacy Finding Aid RTF templates are still available under this feature but do not reflect the current format or updates for ICMS.

7. *What options appear under Tools on the menu bar?*

The Tools menu includes options for managing your **ICMS** system. You can setup a User ID for new users, create and delete data directories, access the Lexicon module, convert image files, and configure the system options.

Note: Most options on the Tools menu are security-controlled. You must have System Administrator rights. For more information on security rights, read Chapter 9, Section VI.

Spell Check

Use this option to check the spelling of words in a record. You can check spelling on one or multiple records. You can check the spelling in all data fields or only in selected data fields. For more information about Spell Check, see Section K, questions 7, 8 and 9 below and Chapter 6, Section II.

Lexicon

Use this option to view and edit the hierarchy of established terms in the lexicons included with **ICMS**.

Lexicons included with **ICMS** are:

- *Nomenclature 3.0 for Museum Cataloging: Third edition of Robert G. Chenhall's System for Classifying Man-Made Objects* (including NPS additions)
- NPS Classification Terms
- *Art and Architecture Thesaurus (AAT)*
- NPS Hierarchical Classification Outline (HCO)

You can also create unit lexicons for your own use. For more information on lexicons and how to use them, read Appendix E: Lexicons.

If you have a need to use other lexicons, such as the Library of Congress Subject Headings, you may want to add those to your system. To add other lexicons to your system, please contact *Re:discovery Software Inc.* Refer to Appendix K: Support for contact information.

Public Search

Use this option to start public search for a selected directory. You must select the directory name only in the Navigation Pane for this option to be active. See Appendix D for more information on the setup and use of public search.

Reclassify and Sweep Words

Use this option to start the Reclassify and Sweep functions. These functions keep the program's word search index up to date. You will use this function only if you have detected a problem with Word Search results. For more information on Reclassify and Sweep, and to see the list of excluded terms, see Chapter 9, Tools, Section I.

Words to Exclude from Word Search

Use this option to define the list of words that searches should ignore, such as A, AN, AND, THE, THESE, etc. Searches are more efficient when they ignore commonly occurring words. You can also remove a word from the exclusion list, if you need searches to find that word. For more information on excluding words from search, see Chapter 7, Section I.E.

Image Conversion

Use this option to convert digital image files from one format to another. You can also use it to change the size (resolution) of an image file. For more information on image conversion, see Appendix G: Imaging and Multimedia.

<i>Image Count</i>	Use this option to count the number of images attached to records in a specified directory and produce a report based on that information. See Chapter 5, Section I for more information on the Image Count report.
<i>Create New Directory</i>	Use this option to create a new data directory, such as a temporary cultural resources catalog directory for volunteer data entry staff. You can create new directories for cultural resources, natural history, archives, and item level archives. For more information on creating a directory, see Chapter 9, Section IV.
<i>Delete a Directory</i>	Use this option to delete an existing data directory that you don't need. When you delete a directory, you delete all the catalog records and related data. The records will no longer be available in ICMS . For more information on deleting a directory, see Chapter 9, Section V.
<i>Autosave</i>	Use this option to view records that have been saved in the temporary autosave location due to a power outage or other unexpected system shutdown while you were adding, copying or modifying a record. You can restore the records, compare with existing records or clear them from autosave. See Chapter 9, Section VIII, for more information on Autosave.
<i>User Security</i>	Use this option to create a User ID and set a password for each person who needs to use ICMS . For more information on security rights, read Chapter 9, Section VI.
<i>System Options</i>	Use this option to configure certain aspects of your ICMS system. For example, you can tell the system which directories need to share data. You can also tell the system where your digital image files are stored. For more information on System Options, see Chapter 9, Section VII.
<i>Fiscal Year Summary Report</i>	Use this option to run the fiscal year summary report. This report is the same report run by the NPS National Catalog. It provides catalog record and accession counts, catalog numbers and accession numbers used, missing or duplicate catalog numbers, etc. See Chapter 5, Section I.C. for information on the fiscal year summary report.
<i>Catalog Comparison</i>	Use this option to compare catalog record data between two directories. See Chapter 8, Section VI.
<i>Global Record Count</i>	Use this option to obtain record, item count, quantity and discipline totals for all directories in your system. See Chapter 5, Section I.C.
<i>Identify Duplicate Records</i>	Use this option to produce a report identifying duplicate records from any table within a directory or directories based on the unique identifier for each table (e.g., catalog number, accession number, loan number, etc.) See Chapter 5, Section I for more information on the Identify Duplicate Records report.
<i>Identify Invalid Flex Dates</i>	Use this option to identify records that have invalid entries in the flex date fields (e.g., Manufacturing Date or Collection Date). Since invalid entries in Flexible Date fields may cause the records to not be sorted correctly or properly indexed for word search, they should be corrected wherever possible. See Chapter 5, Printing and Reports, Section I for more information on the Identify Invalid Flex Dates report.

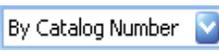
<i>Analyze Sweep Tables</i>	Use this option to analyze the word search indexes when word search is not finding results for any searches. It will report potentially problematic symbols or characters in your data that may have been imported or pasted into a field. See Chapter 9, Section I.D. for more information on the Analyze Sweep Tables function.
<i>ITIS Tables Update</i>	Use this option to apply updates to the Natural History taxonomy lexicon. See Appendix E, Section E, for information on the ITIS lexicon.
<i>Software Updates</i>	Use this option to apply program updates that may be provided periodically. See Chapter 9, Section X.
8. <i>What options appear under Help on the menu bar?</i>	The Help menu includes options for accessing the on-line help system.
<i>System Help</i>	Use this option to access the on-line system help. The content of the system help is the same as the <i>Re:discovery</i> User Manual.
<i>About Re:discovery</i>	This option includes information on contacting Re:discovery Software, Inc.

D. Button Bar

1. *What is the purpose of the button bar across the top of the screen?* The button bar contains icons that represent some of the most frequently used functions. It is located directly below the menu bar. The button bar provides quick access to functions.

Note: A function works the same from either the menu bar or the button bar.
2. *How do I access the functions on the button bar?* Hold your mouse pointer over the icon to see the name of the function. Single-click an icon to use that function.
3. *What do the icons on the button bar mean?* The following pages list the icons on the button bar, and explain their purpose. The pages are designed to be pulled from this manual, copied, and posted near your computer for easy reference.

The Button Bar

	Back		Use this option to go back to a screen you viewed previously, such as another module, directory, or associated module.
	Forward		Use this option to go forward to a screen you viewed previously, such as another module, directory, or associated module. This option is only active after you have used the Back option.
	Navigation Pane		Use this option to close or open the Navigation Pane. The navigation pane is on the left side of the screen. It includes the Navigator “tree”, Field Help, and Quick Actions. You can use the navigator to go to associated modules such as Accessions, Exhibits, and Loans.
	List Pane		Use this option to close or open the List Pane. The list pane is above the record pane. It shows the list of visible records in the current module.
	Record Pane		Use this option to close or open the Record Pane. The record pane shows the data you are currently working with.
 By Catalog Number  Sort			Use this option to organize your records. You can put your records in order by Catalog Number, Location, Object Name, etc. The default sort is by catalog number.
	First Record	F6	Use this option to go to the first record in the visible data, in order by the current Sort. If a filter or tag is active, this option will move to the first record in the filter or tag. This button is inactive if you are on the first record.
	Previous Record	F3	Use this option to go to the previous record in your visible data, in order by the current Sort. The previous record is the record directly before the one currently on the screen. If a filter or tag is active, Previous Record will move to the previous record in that filter or tag. This button is inactive if you are on the first record.
	Next Record	F4	Use this option to go to the next record in your visible data, in order by the current Sort. The next record is the record directly after the one currently on the screen. If a filter or tag is active, Next Record will move to the next record in the filter or tag. This button is inactive if you are on the last record.
	Last Record	F7	Use this option to go to the last record in the visible data, in order by the current Sort. If a filter or tag is active, Last Record will move to the last record in the filter or tag. This button is inactive if you are on the last record.
	Get	F8	Use this option to get a specific record, in order by the current Sort. For example, if the records are sorted by catalog number, Get will prompt you to enter a catalog number.
	Find Record	Ctrl-F	Use this option to find the next occurrence of a specific word or character string in the List Pane. You can search forward or backward in the list. You can search within only one field, or within all fields in the List Pane.
   Quick Search			Use this option to enter the word(s) you are looking for in the Quick Search box, then press Enter or click the blue arrow to perform the search.
	Advanced Search	Alt-8	Use this option to perform complex searches for words and phrases that occur anywhere in your collection records. Advanced Search is one of the most powerful features of the program. It is often the quickest and easiest option for finding records. You can: <ul style="list-style-type: none"> • perform Boolean searches using AND, OR, and NOT conditions • search the current directory, all directories and modules, or specify directories and modules you want the system to search For detailed information on using Advanced Search, see Chapter 7, Finding and Grouping Records.
	Advanced Filter		Use this option to limit the visible data to records that match specific field values that you define. You can save a filter for later use. You can select fields to include in the list view and select the fields to sort by when using the filter. For more information on Advanced Filter, see Chapter 7, Finding and Grouping Records.

	Deactivate Filter		Use this option to deactivate an active filter. Your visible data will no longer be limited to records that match the filter.
	Activate a Tag Set		Use this option to select an existing tag set, and activate it. Only the records in the tag set will be visible.
	Deactivate Tag Set		Use this option to deactivate an active tag set. Your visible data will no longer be limited to records in the tag set.
	Add New Record	F9	Use this option to create a new record. Add creates a new blank record and places you in Add Mode. In the Collections module, the last acronym that was used for the catalog and accession number will appear on the record. After you save the new record, the program returns to View Mode. For more information on adding or modifying catalog records, see Chapter 2, Cataloging.
	Modify This Record	F10	Use this option to modify the contents of the record currently on the screen. You may change previously entered data or enter new information. This option places you in Modify Mode.
	Copy This Record		This option allows you to make an exact copy of the record currently displayed on the screen and then to edit the new record. You cannot save the copy unless you change the catalog number. This option places you in Copy Mode, so that you can modify the catalog number and any other fields.
	Refresh		Use this option to refresh the screen if other users have modified the record since you began to view it.
	Quick Report		Use this option to use the Quick Report feature to easily create and run reports on your data. For more information on creating quick reports, read Chapter 5, Printing and Reports.
	Proficio Reports		Use this option to run all the required DOI, Bureau, and NPS forms and to create new report formats using the Proficio Report Designer. For more information on running existing reports and creating reports, read Chapter 5, Printing and Reports.
	Full View		Use this option to open the Full View window. Full View lets you see all the data in all the fields for a record, in one window. You can print the contents of the window, or save it as a file. See Chapter 5, Printing and Reports.
	Print Preview		Use this option to preview what will print with the Print List option.
	Print List		Use this option to print the list of visible data. The fields and records included in the printout will match those in the List Pane. See Chapter 5, Printing and Reports.
	Lexicon		Use this option to view and edit the hierarchy of established terms in the lexicons included with ICMS. You can also create unit lexicons for your own use. For more information on lexicons and how to use them, read Appendix E: Lexicons.
	System Help	F1	Use this option to access the on-line system help. The content of the system help is the same as the <i>Re:discovery</i> User Manual.
	View Hierarchical Browse		Archives module only. Use this option to open the Hierarchical Browse window. The window displays Collection, Series, File Unit, and Item level records in a color-coded hierarchy. The window can remain open while you work with records. See Appendix F, Archives Module for more information.
	Use Hierarchical Ranges		Archives module only. Use this option to activate/deactivate the use of hierarchical ranges. When active, this option limits the visible data to the records within the same range as the current Collection, Series, or File Unit. When inactive, all records are visible. See Appendix F, Archives Module for more information.
	Create MARC record(s)		Archives module only. Use this option to create a MARC record from the current data on the Collection record. Only available on the Collection level record. See Appendix F, Archives Module for more information.

E. Function Keys

1. Can I use Function keys as shortcut keys?

Yes. The table below lists the function keys available in *Re:discovery*. In addition, you can make your own shortcut keys using the macro function.

F1	System Help		Access the on-line system help. The content of the system help is the same as the <i>Re:discovery</i> User Manual.
F2	Save Record		Save the record you are currently editing in Add, Modify, or Copy mode.
F3	Previous Record		Go to the previous record in your visible data, in order by the current Sort. If a filter or tag is active, Previous Record will move to the previous record in that filter or tag.
F4	Next Record		Go to the next record in your visible data, in order by the current Sort. If a filter or tag is active, Next Record will move to the next record in the filter or tag.
F5	Browse Authority Table		In Add, Modify, or Copy modes, browse and select a term from an authority table.
F6	First Record		Go to the first record in the visible data, in order by the current Sort. If a filter or tag is active, this option will move to the first record in the filter or tag.
F7	Last Record		Go to the last record in the visible data, in order by the current Sort. If a filter or tag is active, Last Record will move to the last record in the filter or tag.
F8	Get		Get a specific record, in order by the current Sort. For example, if the records are sorted by catalog number, Get will prompt you to enter a catalog number.
F9	Add New Record		Create a new record. Add creates a new blank record and places you in Add Mode. After you save the new record, the program returns to Menu Mode.
F10	Modify This Record		Modify the contents of the record currently on the screen. You may change previously entered data or enter new information. This option places you in Modify Mode.
F11	Field List		Open the list of fields in Advanced Search to select a field to limit the search. Play the active Macro in edit modes.
F12	Expand Field		Open the field in a larger window, so you can see all the text. Use for any memo, formatted memo, repeating formatted memo, or stacked table field.
Alt-8	Advanced Search		Perform complex searches for words and phrases that occur anywhere in your collection records. Advanced Search is one of the most powerful features of the program. It is often the quickest and easiest option for finding records.
Alt-F4	Exit		Exit ICMS.
Ctrl-A	Select All		Select all the text in a field, so that you can cut or copy it.
Ctrl-C	Copy		Copy the selected text, so you can paste it in another location.
Ctrl-F	Find Record		Find the next occurrence of a specific word or character string in the List Pane.
Ctrl-N	Next Page		Go to the next page of a multi-page catalog record.
Ctrl-R	Previous Page		Go to the previous page of a multi-page catalog record.
Ctrl-V	Paste		Paste the text you've copied to the Windows clipboard. Note: You must be in Add, Modify, or Copy mode to add text to a record.
Ctrl-X	Cut		Cut the selected text from a record. Note: You must be in Add, Modify, or Copy mode to remove text from a record.
Ctrl-Z	Undo		Undo the last word you typed in a record.
Ctrl-Insert	Character Map		Open the Windows Character Map to insert special characters in your data.
Ctrl-F5	Edit Authority Table		Open a user-built authority table to add new terms or edit existing terms.
Ctrl-Del	Delete Term		Delete a term from a field controlled by an authority table.
Shift-F10	Right-click Menu		Open the right-click menu for a field when in Add, Modify or Copy mode.

F. Modes of Operation

ICMS has five different modes of operation. The current mode appears on the status bar in the lower right corner of the screen.

1. *Browse Mode*

Browse Mode is active when you are using the Home Page or Navigator to select the directory or module where you want to work. The system will remain in Browse Mode until you select a data set to work with.
2. *View Mode*

View Mode is active when you view a data record. It is the default mode. In View Mode, you can select and view records, and run reports. You cannot change or add data.
3. *Modify Mode*

Modify Mode is active when you are modifying an existing record. When you modify a record, a separate window opens and the status bar will say Modify Mode. All the fields on the screen are active and the data can be edited.
4. *Add Mode*

Add Mode is active when you are adding new records. When you add a new record, a separate window opens and the status bar will say Add Mode. In Add Mode the screens contain empty fields. All the fields on the screen are active so that you can add data.
5. *Copy Mode*

Copy Mode is active when you copy the current record to create a new record. When you copy a new record, a separate window opens and the status bar will say Copy Mode. In Copy Mode the screens contain the same data as the record you copied. You must change at least the Catalog Number in order to save the record.

G. Visible Data

1. *What is "visible data"?*

The active data in **ICMS** are called visible data. Visible data are the data that the program sees and acts upon on commands from the user. Visible data include all the records in an active tag or filter, and all the records that you can scroll through in the List Pane.
2. *Aren't all my data visible?*

No. Visible data can be the entire database or a subset of data that you have selected. Frequently, you will want to work with subsets of your data. For example, you may want to work with only the biology records or the books in the collection.
3. *How do I create subsets of data?*

You can create a data subset by using the search, filter or tag functions. These functions are explained in depth in Chapter 7, Finding and Grouping Records.
4. *Why is it important to be aware of visible data?*

When running reports or updating groups of records, you need to be aware of the currently visible data. You can print reports that include the current record, or all visible records. You can update the current record, or all visible records. Here's how the process works:

 - you create a subset of data, for example, the records for a group of objects on exhibit
 - you use the Mass Supplemental Update command to change the data, for example, the Object Status, Status Date, and Location fields

- the program will only make the change on the data that are visible to the program, that is, the records for the objects on exhibit
- the change does not affect the other records in the database

5. *How do I know what data are visible?*

The status bar at the bottom of the screen tells you the visible data. It tells you whether a "filter" or "tag" is active. Filters and tags limit the visible data. If these words do not appear, all the records are visible.

H. Right-click Menus

1. *What are right-click menus?*

Right-click menus are short lists of common or frequently used functions specific to a field or list item. They show the name of the function as well as the shortcut key for that function if available. The majority of these functions can also be found in the menus on the Menu Bar.

2. *How do I get to the right-click menus?*

Using the mouse, position the mouse pointer in a field, over an item in the list or navigator, or over an image, then click using the right button on the mouse.

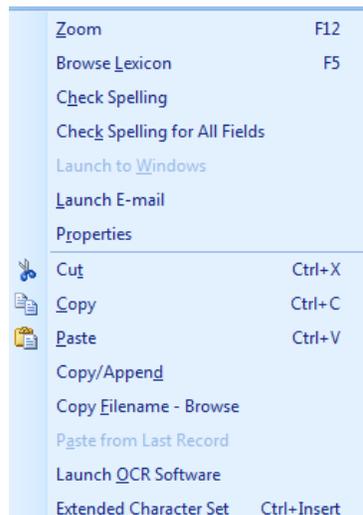
3. *Why are some options on the right-click menu grayed out?*

Many of the options depend on the mode you are in or what is selected. For example, the spell check options are only available when you are in add, modify or copy mode. The copy option is only available if you have text highlighted.

4. *What are the right-click menu options for fields?*

There are two right-click menus associated with data entry fields in every module and associated module. The menu you see is determined by the field type.

The right-click menu for memo, straight entry, formatted memo, repeating formatted memo, date and numeric fields looks like this:



Note: Options marked with "*" are only available on the right-click menu or by using the shortcut key associated with that option.

*Zoom

Expands the current field to view more text, subfields or further data entry windows.

<i>Browse Lexicon</i>	Available only on memo fields in add, modify or copy modes. Opens the lexicon window where you can search for and view the hierarchy of terms in the <i>AAT, Nomenclature 3.0</i> , HCO and unit lexicons. For more information on how to use the Lexicon, see Appendix E.
<i>Check Spelling</i>	Checks the spelling for the current field. You must be in add, modify or copy mode.
<i>Check Spelling for All Fields</i>	Checks the spelling for all fields in the current record. You must be in add, modify or copy mode.
<i>*Launch to Windows</i>	<p>If you have a file path in the selected field, you can use this option to start the program that created the file and view the contents of that file. This is very useful if you have reports from conservators or researchers about the object but do not want to copy the entire contents of the report into the catalog record. Use the Copy Filename – Browse function described below to copy external file paths.</p> <p>Note: The file path must be the only text in the field.</p>
<i>Launch email</i>	Starts your email application.
<i>*Properties</i>	Displays the field properties for the current field.
<i>Cut</i>	Use this function to delete highlighted text in the field. You must have text highlighted and be in add, modify or copy mode to use this function.
<i>Copy</i>	Use this option to copy the highlighted text, so you can paste it in another location. Copied text is held in the Windows “clipboard”. You can paste the text into a Word document, email, etc.
<i>Paste</i>	Use this option to paste text from the clipboard to the current field. You must have copied text to your computer’s clipboard first and be in add, modify or copy mode to use this option.
<i>Copy/Append</i>	Use this option to copy highlighted text from more than one field. After selecting and copying one piece of text, select another piece of text and use Copy/Append. Both pieces of text are held in the Windows clipboard, waiting for you to paste them.
<i>*Copy Filename – Browse</i>	<p>Use this option to open a Windows dialog box to select an external file that you want to paste a reference to in the ICMS field. This will copy the file path to the clipboard. You can then use the paste option to insert the file path in the selected field. You must be in add, modify or copy mode to paste the file path.</p> <p>Example: c:\reports\consreport.doc</p>
<i>*Paste from Last Record</i>	This option will paste the contents from the same field of the previous record you were viewing into the same field of the current record. You must be in add or modify to use this option.

***Launch OCR Software**

This option starts your Optical Character Recognition Software. OCR software scans documents and converts them to editable electronic file formats. You must be in add, modify or copy to use this option. See Appendix B, Installation and Setup for information on connecting to OCR software.

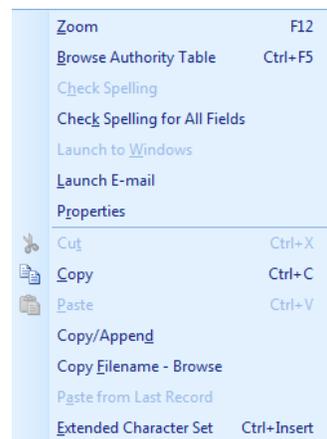
***Extended Character Set**

Use this option to paste accented characters or symbols not available on the keyboard in the text.



- In the Character Map window, select a Font if necessary and then click on a character in the grid.
- Click Select to paste the character in the Characters to copy field. You can choose more than one character by clicking on a different character and then click Select again. Both characters will be copied.
- Click Copy to paste the selected characters on the Windows clipboard.
- You can leave the Character Map window open if desired so that you can use other characters, or click the X to close the Character Map window.
- In the catalog record field, press <Ctrl><V> to paste the character in the field. Or right-click and choose paste on the right-click menu. The character will be pasted in the location of the cursor.

For single authority table and stacked authority table fields, the right-click menu looks like this:



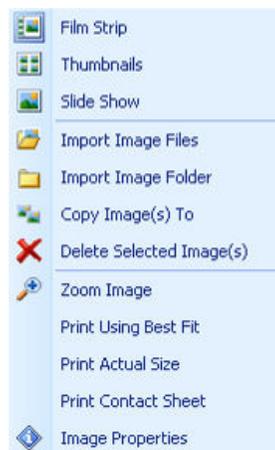
There are two differences on this menu, Launch OCR Software has been removed and Browse Lexicon is replaced by:

***Browse Authority Table**

Opens the authority table associated with the selected field so that you can view, add, delete or modify terms in the table. To add, delete or modify terms in the table, you must have the appropriate security rights.

5. What are the options on the right-click menu for Images?

On the Images page of a record (available in collections, archives and some associated modules), you can right-click on any image and see the following right-click menu.



Film Strip

This option changes the Images layout to the Film Strip style which shows the thumbnails in a column on the left and a single enlarged image on the right.

Thumbnails

This option changes the Images layout to show only the thumbnails of images attached to the catalog record.

Slide Show

This option changes the Images layout to show only a single enlarged image. Use the forward and back arrows on the button bar in the Images page to view additional images attached to the record.

Import Image Files

This option opens an Open window for you to select image file(s) to attach to the current record. See Appendix G: Imaging and Multimedia for further information on attaching images.

Import Image Folder

This option opens a Browse for Folder navigation window for you to select a folder of images to attach to the current record. This will attach all image files inside the selected folder to the current record.

Copy Image(s) To

This option opens a Browse for Folder navigation window for you to select a folder to copy the selected image(s). This makes a copy of the image file(s) and pastes them in the selected folder. You can select multiple images to copy at the same time by holding the <Ctrl> key and clicking on each image.

Delete Selected Image(s)

This option deletes the selected image(s) from the current record. To select more than one image at a time, hold the <Ctrl> key and click on multiple images.

Zoom Image

This option opens the Picture Zoomer window to allow you to view the full image and zoom in or out.

Print Using Best Fit

This option prints the selected image sizing it to fit on the page. A Preview window opens allowing you to view the page before printing.

Print Actual Size

This option prints the image using its true size. A Preview window opens allowing you to view the page before printing.

Print Contact Sheet

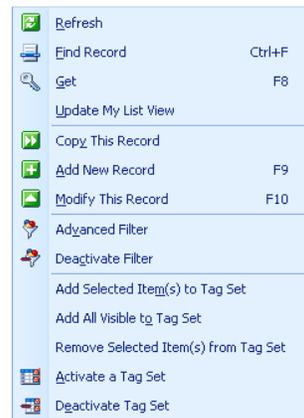
This option prints all the thumbnails for a record on one or more pages depending on how many images are attached to the record. Multiple thumbnails are printed on each page. A Preview window opens allowing you to view the page(s) before printing.

Image Properties

This option opens the Picture Properties window showing the title, description and file information (resolution, size, location, etc.) for the selected image. It also shows you the Exchangeable Image File Format (Exif) information if available (e.g., camera used to create the image, settings, etc.).

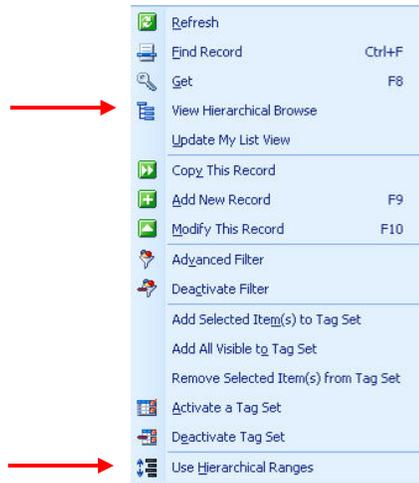
6. *What are the options on the right-click menu for a row in the List Pane?*

When you right-click on a row in the List Pane, you will see this right-click menu for collections and associated modules. All of these options are available on the button bar and menu bar.



See Section C above for information on how these options work.

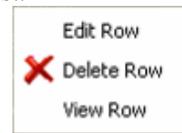
In the Archives module, the right-click menu in the List Pane for Collections, Series, File Unit and Item records has 2 additional options related to archives:



For information on how to use the View Hierarchical Browse and Use Hierarchical Ranges options, see Section J below and Appendix F. These options are also available on the button bar and menu bar.

7. *What are the options on the right-click menu for a record in the Supplemental list?*

On the Supplemental Information page of the catalog or archive record, you can right-click on a supplemental record in the list and see this right-click menu. All of these options are also available on the Supplemental Information page above the list.



Edit Row

This option opens the supplemental record in a new window in Modify mode.

Delete Row

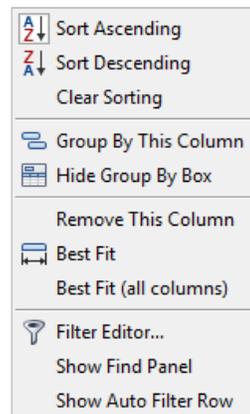
This option deletes the supplemental record from the catalog record. Click Yes to delete the supplemental record when prompted.

View Row

This option opens the supplemental record in a new window in View mode.

8. *What are the options on the right-click menu for the column headers in the List Pane, Supplemental list, archives sub-records list and other lists with column headers?*

In the List Pane, Supplemental page, sub-records lists for archival records and most other lists with column headers in the program, when you right-click on one of the column headers, you will see this right-click menu.



Note: Options marked with ‘*’ are only available on the right-click menu or by using the shortcut key associated with that option.

***Sort Ascending**

Sorts the records in the List Pane or Supplemental list by the current column in ascending order (smallest to largest or A to Z). An arrow appears in the column header indicating the direction of the sort.

Note: You can also click on the column header to sort the list.

***Sort Descending**

Sorts the records in the List Pane or Supplemental list by the current column in descending order (largest to smallest or Z to A). An arrow appears in the column header indicating the direction of the sort.

Note: By clicking on the column header again, you can reverse the sort order.

***Clear Sorting**

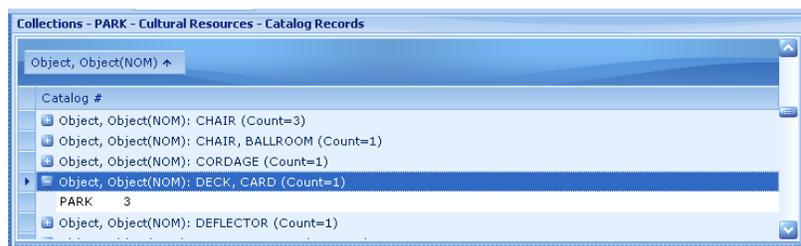
Cancels the sort on the selected column. This option is available only on the column that is currently used as the sort in the List Pane. When you clear the sort on the column, the order reverts to the sort order indicated on the button bar.

***Group By This Column**

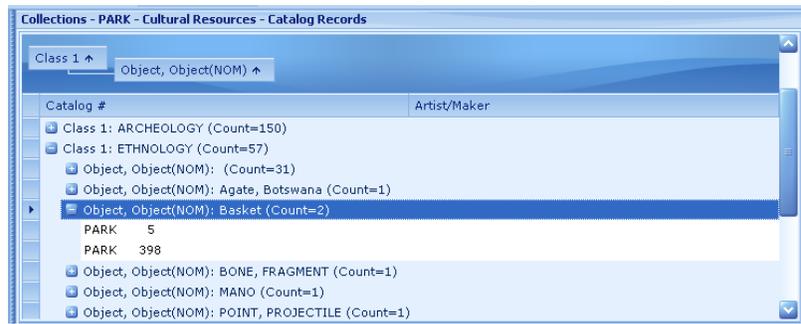
This option groups the records in the List Pane or Supplemental list by the unique entries in the selected field.

Note: You can also drag the column header to the area above the list. This area is called the Group By Box.

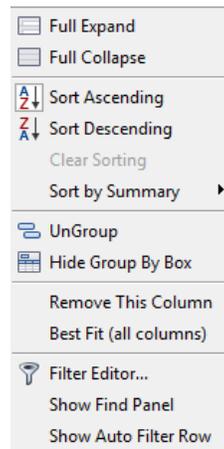
Notice that the column disappears from the List Pane or Supplemental list and you will see the unique entries from that field preceded by a +. Each row also indicates how many records are contained in that group. Click on a + to expand a unique entry and see the individual records.



You can group by more than one field by selecting another column header and dragging it to the Group By Box or right-clicking and choosing Group By This Column. This gives you a secondary grouping inside the main grouping. You can create as many sub groupings as you have column headers less one if desired (you must leave at least one column in the List Pane).



If you right-click on a column header while it is in the Group By Box, you will see a similar right-click menu with 4 additional options for expanding, collapsing and sorting the groupings.



**Full Expand*

This option expands all entries in the List Pane or Supplemental list so you can see all the records under each group without clicking the + in front of each row.

**Full Collapse*

This option collapses all groups back down to the main group.

**Sort by Summary*

This option allows you to sort the grouping by record id either in ascending or descending order. If you select one of these sorting options, when you right click again on the column header in the Group By Box, an option to Clear Summary Sorting will appear to return to the regular sort on that column.

**UnGroup*

This option removes the selected column header from the Group By Box and returns it to the List Pane. The records are no longer group by this column.

**Hide (Show) Group By Box*

This option opens and closes the area above the List Pane or Supplemental list. If you do not see the Group By Box, right-click on a column header in the list and select Show Group By Box.

**Remove This Column*

This option will remove the selected column from the List Pane or Supplemental List. **Note:** the removed column will reappear when you reselect the sort or exit and log back into the program.

**Best Fit*

This option sizes the selected column to the widest entry in that field.

Note: To adjust the width of any column manually, use the mouse to drag the right edge of the column header to the left or right. You should notice the mouse pointer turn to a right/left arrow when you hover over the edge of a column header.

***Best Fit (all columns)**

This option sizes all the columns in the List Pane or Supplemental list to optimal widths so that all columns in the list are viewable.

***Filter Editor**

This option opens the custom quick filter editor window. This is the same as choosing (custom) on the quick filter pull down menu of a column header. This option only appears if no quick filter is currently active. If a quick filter is active, use the Edit Filter button on the Quick Filter indicator bar below the List Pane. See Chapter 7, Section II for further information on quick filters.

***Clear Filter**

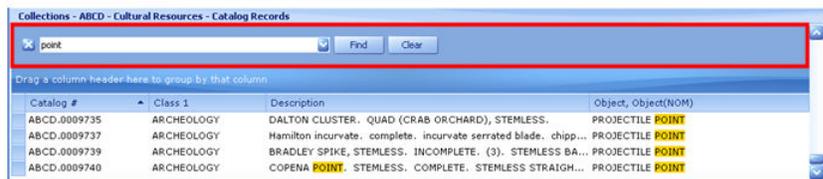
This option cancels any quick filter you may have set on that column in the List Pane or other lists. It only appears on the right click menu if you have a quick filter activated on that column in the list.

Note: This option does not cancel any built in filters or advanced filters you may have set. It only cancels quick filters set using the column header pull down list.

***Show Find Panel**

This option opens a panel above the List Pane where you can enter a word or string of characters to find in the fields in the List Pane. This limits the visible data to only those records that contain that word or character string within any field in the List Pane. (This option is not available if you have a quick filter active already.)

For example, enter ‘point’ and click the Find button to limit the list to those records that have that word in one of the fields in the List Pane. Note that it will highlight the word in the fields.



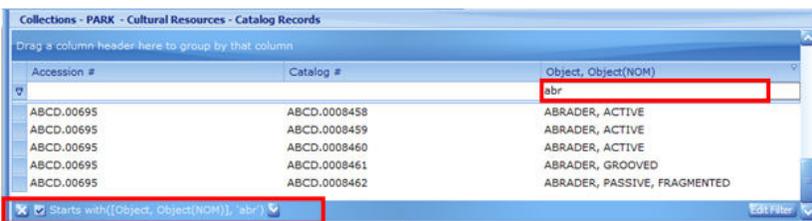
Click Clear to return the list to all records.

To turn off the Find Panel, click the X in front of the entry box, or right click a column header and choose Hide Find Panel.

***Show Auto Filter Row**

This option adds an editable row just below the column headers in the List Pane or Supplemental List. You can use this row to type a word or character string on which to filter. This will create a “Starts with” filter for that column. (This option is not available if you have a quick filter active already.)

For example, with this auto filter row activated, enter ‘abr’ in the object column to find all records where the object name begins with ‘abr’. (It is not case sensitive.)



To turn off the auto filter row, right click a column header and choose Hide Auto Filter Row.

9. *What are the options on the Hierarchical Browse View right-click menu in the archives module?*

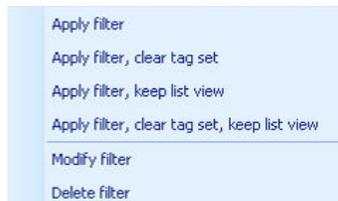
In the Archives Hierarchical Browse window, you can right-click on any row to see these right-click menu options:



All of these options are available on the button bar and menus in the hierarchical browse window. See Section J below and Appendix F: Archives Module, for information on how to use these options.

10. *What are the options on the Saved filter right-click menu?*

In the Navigation Pane, you can right-click on a saved filter and see the following filter options:



The options here allow you to set, modify and delete the selected filter. For more information on creating and activating filters, see Chapter 7, Section II.

Apply filter

Sets the selected filter on the visible data. The List Pane fields may change to fields specified in the filter.

Apply filter, clear tag set

Deactivates the current tag set and sets the selected filter.

Apply filter, keep list view

Sets the selected filter and maintains the List Pane fields.

Apply filter, clear tag set, keep list view

Deactivates the current tag set and sets the selected filter without changing the fields in the List Pane.

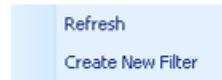
Modify filter

Opens the Advanced Filter window with the selected filter properties displayed for you to modify, activate and save.

Delete filter

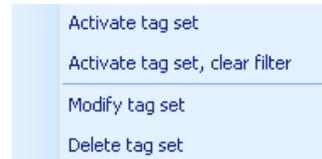
Deletes the selected filter. Note: you cannot delete built-in filters.

If you right-click on My Filters or Shared Filters, you can refresh the filter list or create a new advanced filter.



11. What are the options on the Tag Set right-click menu?

In the Navigation Pane, you can right-click on a tag set and see the following tag set options:



Activate tag set

Activate the selected tag set.

Activate tag set, clear filter

If a filter is currently active, you can cancel the filter before activating the tag set.

Modify tag set

Opens the Tag Set Manager window. Here you can change the properties of a tag set such as the name or description.

Delete tag set

Deletes the selected tag set.

12. What are the options on the Quick Entry right-click menu?

In the Navigation Pane, you can right-click on a quick entry format and see the following tag set options:



Modify Records with Quick Entry

Activates the Quick Entry format selected for you to modify records.

View Records with Quick Entry

Activates the Quick Entry format in view mode.

Modify Quick Entry Format

Opens the Quick Entry Manager window where you can update the format such as change or add columns.

Delete Quick Entry Format

Deletes the selected quick entry format.

If you right-click on Shared Quick Entry Format or My Quick Entry Format you can refresh the quick entry list or create a new quick entry format.



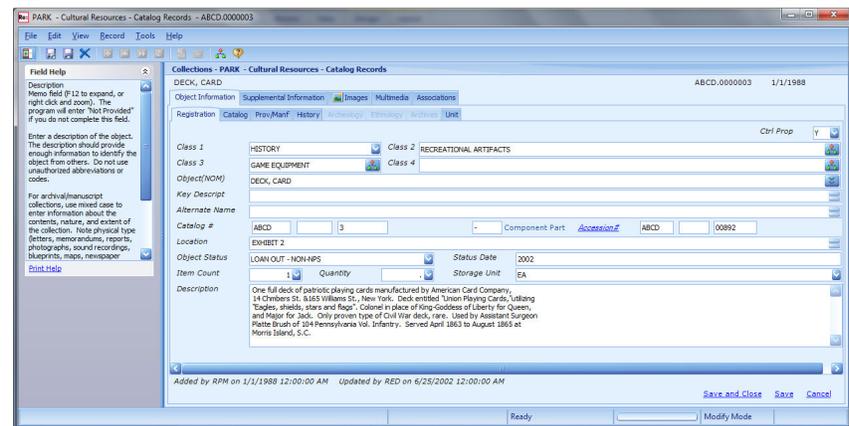
I. Catalog Record Screens

1. *What are the names on the tabs at the top of the catalog record?*

The tab names tell you what part of the record you are looking at. There are five parts to a record: Object Information, Supplemental Information, Images, Multimedia and Associations.

Object Information is divided into five categories:

- Cultural Resources categories are: Registration, Catalog, Provenience/Manufacture, discipline, and Unit
- Natural History categories are: Registration, Catalog, Collection Site, discipline, and Unit



Note: Archives records (see Section J below) and associated module records look different and have different parts than Collections Module catalog records. Refer to Chapter 4, Associated Modules, and Appendix F: Archives Module, to learn about those types of records.

2. *Why are some of the tabs inactive?*

Entries in the Class 1 field (Class 4 field for archives) determine the active tab and the fields on the discipline-specific screen. There are four discipline screens in the Cultural Resources Module: Archeology, History, Ethnology and Archival/Manuscript Collections. There are three discipline screens in the Natural History Module: Biology, Geology and Paleontology. For specific field by field help for cataloging objects using the discipline-specific screens, read Chapter 2, Cataloging.

3. *How do I move between pages within a catalog record?*

To move from page to page:

- press the Ctrl-N (Next Page) and Ctrl-R (Previous Page) keys, *or*
- go to View on the menu bar and choose Next Page or Previous Page from the pull-down menu

4. *How do I move through the fields in the catalog record?*

Press the Tab key to move from one field to the next. Shift-Tab will take you back one field. You can also move the mouse pointer to the field and single-click.

5. What is the difference between the DOI and NPS catalog screens?

The only difference between DOI and NPS catalog screens is the Catalog # and the Accession # fields. The DOI catalog and accession number fields are unformatted. They allow any numbering format in use by the various bureaus. The NPS catalog and accession number fields use a strict 3-part format.

Any DOI bureau except NPS may use the DOI format. All NPS records should be entered using the 3-part NPS format.

6. What is the difference between the "Save", "Save and Close" and "Save and Add Another" links?

Use these links to save your work when you are in Add, Modify, or Copy modes. These links do not appear on the screen in View mode.

To save the record but leave the record window open, click the Save link, or press the Tab key until Save is highlighted and press the Enter key. If you have not completed all the mandatory fields you will be prompted to save the record as a DRAFT RECORD. You will now be in View mode on the record.

To save the record and close the edit window, click on the Save and Close link, or press the Tab key until Save and Close is highlighted, and press the Enter key. If you have not completed all the mandatory fields you will be prompted to save the record as a DRAFT RECORD. The edit window will close.

In Add mode only, click the Save and Add Another link to save the current record, and add another record. A new Add Mode window will open.

Note: You can enter data and move to the next screen without saving until you have completed the record.

7. What are the User fields on the Unit tab?

ICMS contains several User fields that allow you to enter unit-specific data. The Unit page of the catalog record contains 10 User fields. Most of the associated modules also contain User fields on the Extended Information page.

8. How do I create a unit-specific field from a User field?

You must have System Administrator security rights to change a User field. Refer to Chapter 9, Section VI for information on security rights.

To create a unit-specific field from a User field:

- Right-click the field and choose Properties from the pop-up menu. The Field Properties window opens.
- Enter a new label for the field, and select a field type from the pull-down. See Section K below for information on field types.
- Click the Save and Close link to save your changes.

J. Archive Record Screens

1. When do I use the Archives Module?

Use the Archives Module to catalog and manage hierarchically organized archive or manuscript collections.

2. What are archival levels?

The 4-level archives directory has four hierarchically related levels: Collection, Series, File Unit and Item.

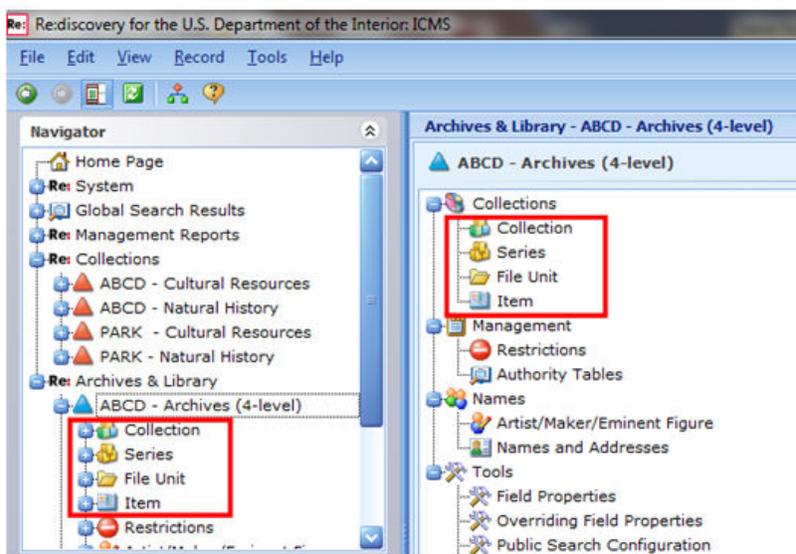
- The Collection level is the broadest level of description. Collections may be further described in related sub-records such as Series, File Unit and Item records. Collection level records may be transferred from the Cultural Resources module (see Chapter 2, II. Cataloging Archival/Manuscript Collections).
- The Series level allows for specific sub-divisions of a collection, usually by subject. It may be further described in File Unit and Item records related to each series.
- The File Unit level describes the contents of a box, folder or other container housing archival documents. Each File Unit record may be described in individual Item records.
- The Item level is used to describe individual documents within a collection, such as a single letter or photograph.

Note: It is not necessary to enter records at every level. For example, a series may only have item records without any intermediate file unit records.

3. *How do I view records at each archival level?*

To view all records at a specific level:

- In the Navigation Pane, select the archival level in the navigation tree directly under the archives directory, or
- On the Archives directory page, double-click the archival level under Collections.



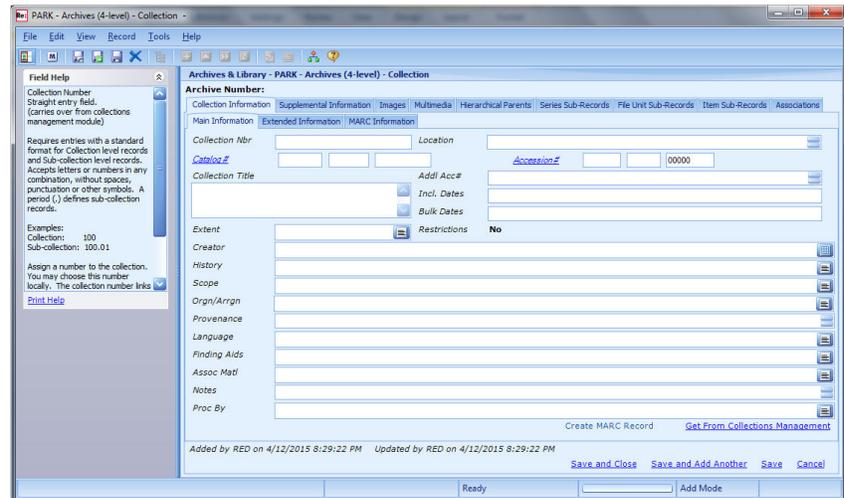
These will load all records for the level you choose.

4. *What are the names on the tabs at the top of the archives record?*

The tab names tell you what part of the record you are looking at. There are 5 main parts to an individual archive record: Main Information (Collection, Series, File Unit or Item); Supplemental Information; Images; Multimedia; and Associations. In addition, there are tabs for Hierarchical Parents and the various Sub-Records tabs to show the hierarchical children depending on the archival level you are viewing.

The first tab is labeled according to the archival level you are viewing and is divided into 3 categories:

- Collection, Series, File Unit, or Item Information
- Extended Information
- MARC Information (Collection records only)



5. *What is the MARC Information tab?*

The MARC Information tab is available only for Collection level records. It shows the MARC record that can be created from the archive record. A MARC record is a “**M**achine-**R**eable **C**ataloging” record used by library systems. See Appendix F: Archives Module for further information about MARC records. MARC Information is optional.

6. *How do I move between pages within an archive record?*

To move from page to page:

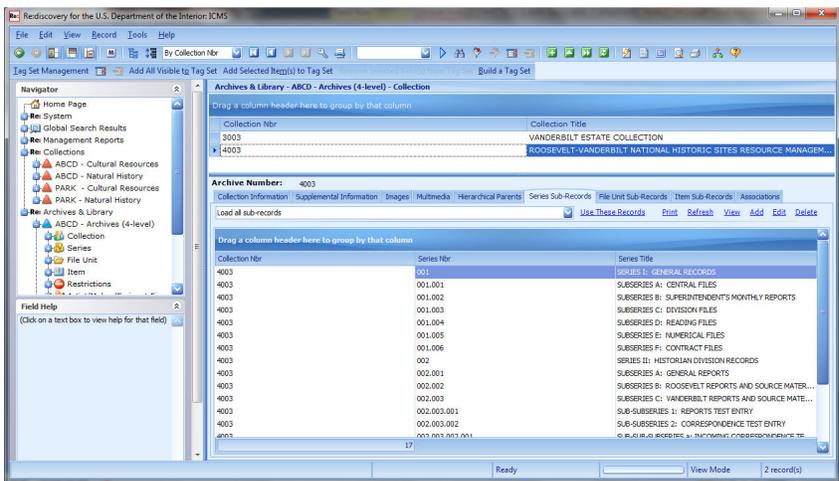
- click the tabs, *or*
- press the Ctrl-N (Next Page) and Ctrl-R (Previous Page) keys, *or*
- go to View on the menu bar and choose Next Page or Previous Page from the pull-down menu

7. *What is the Hierarchical Parents tab?*

Hierarchical Parents shows the records that are related to the current record at the levels above. For example, to view the Series and/or Collection records that the Item belongs to, go to the Hierarchical Parents page. Click on one of the parent links to go to that record. Collection level records have no Hierarchical Parents unless it is a subcollection.

8. *What are the Sub-Records tabs?*

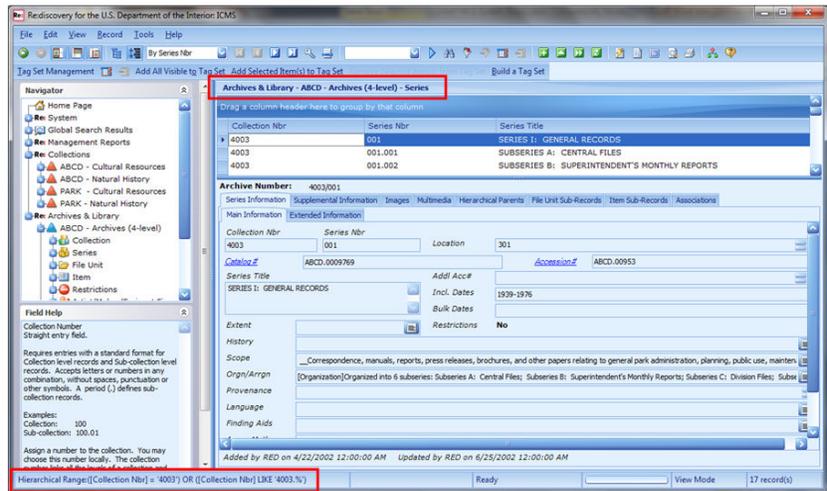
The Series, File Unit and Item Sub-Records tabs show the related records that describe the current record in more detail. For example, to view the list of series records for a particular collection, select the Series Sub-Records tab from the Collection record.



9. What is the “Use These Records” option on the sub-records tabs?

“Use These Records” changes the level at which you are currently viewing to the sub-record level and loads the listed sub-records into the List Pane and Record Pane setting a hierarchical range for only these records. These records will become your visible data.

For example, to use the Series level records of a Collection, choose the Series Sub-Records tab and click Use These Records. These series records will be loaded into the List Pane and Record Pane; the level will change to Series; and a hierarchical range will be set for the Collection number you were viewing.



10. Why are some of the sub-records tabs missing from the Series, File Unit and Item records?

Because of the hierarchical arrangement of the directory, each level will have one fewer sub-level in which it can be divided. A Series record can be described in more detail in File Unit and Item sub-records while a File Unit record can only be further described in Item sub-records. An Item record is the lowest level and has no sub-records. Use the Hierarchical Parents tab to access the related records above the current level.

11. What are hierarchical ranges?

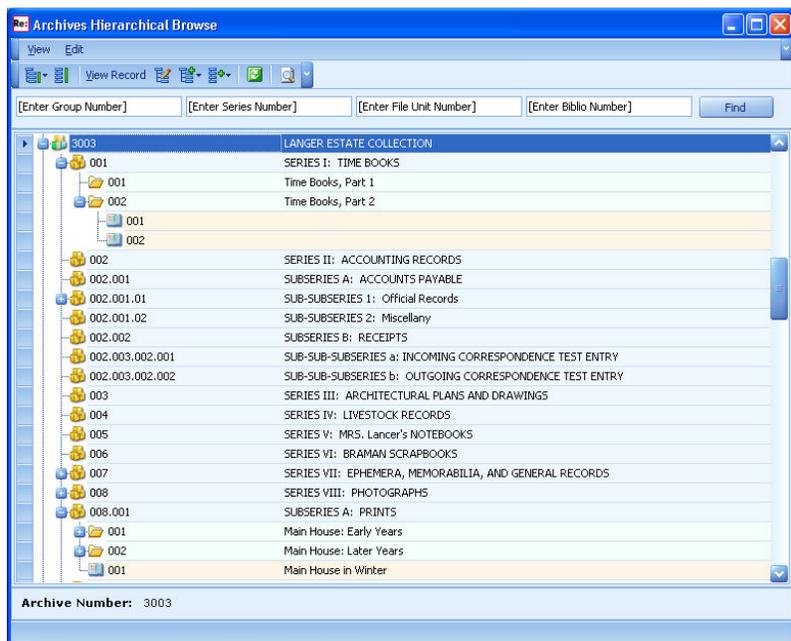
Hierarchical ranges limit the visible data to a specific collection, series, or file unit. Each archive record has a multi-part number beginning with the Collection number to identify it as belonging to a specific collection, series and/or file unit. For example, a hierarchical range set on the Item level might be a filter for the Collection and Series number to which the group of Item records belong.

The Hierarchical Range function is either active or inactive. You can activate or deactivate it on each level separately. To turn it on or off, click the Use Hierarchical Ranges button  on the button bar or go to Record on the menu bar and uncheck Use Hierarchical Ranges. When active the Status Bar displays “Hierarchical Range” in the lower left.

12. How can I view all the archive records in a hierarchical list?

To view all levels of archive records arranged hierarchically:

- click the View Hierarchical Browse button  on the button bar, or
- go to Record on the menu bar and choose View Hierarchical Browse.



To expand a level, click on the + symbol in front of it. Each sub-record is indented below its immediate parent.

There are several features available from the hierarchical browse. These can be accessed from the button bar or the right-click menu.

- You can view and modify a single record from this list by double clicking the record to open it, or right-click and select View Record or Modify Record  on the pop-up menu. The record will open in a separate window.

- You can add records from this list view. Right-click on a record and choose to Add Record to Same Parent  or Add Sub-Record  and choose which level. A new record window will open and the record will be added to the same collection at the level you chose.
- You can load the sub-records of a record to the List Pane by right-clicking and choosing Use Sub-Records  then the level to load. You can also load the records at the same level by choosing Use Records at Current Level . A hierarchical range is set for that collection.
- The Hierarchical browse window can remain open while you work in the main screen so that you can toggle between the views. To toggle between screens, press Alt-Tab.

K. Field Types

1. What are the icons that appear on each field?

The icons identify the field type. Different field types work in different ways to help you enter data more efficiently and accurately. The table below describes each of the field types.

<i>Icon</i>	<i>Field Type</i>	<i>Description</i>
(none)	Simple Text	This is a straight entry field of limited length. Some unedited fields only accept numeric entries.
	Numeric	Accepts only numbers. Some numeric fields are formatted to allow decimal places. In Add, Copy, or Modify modes, press F4 or click the down arrow to open a calculator.
	Authority Table	As you type, the program will autofill the term from the user-built table. Press F5 to select from the table. Note: If there are no entries in the table, you will need to add terms before using these features. Press Ctrl-F5 or right-click and choose Browse Authority Table to add to and edit the table. To choose an entry from the table, highlight the entry and press Enter, or click Select. Press Ctrl-Delete to remove data from the field.
	Locked Authority Table	As you type, the word will complete from an authority table of acceptable terms. Press the F5 key to view and select terms from the table. No users can edit the terms in a locked table. Press Ctrl-Delete to remove data from the field.
	Stacked Authority Table	You can enter multiple terms. Begin typing or press F5 to select terms from the table. Note: If there are no entries in the table, you will need to add terms before using these features. Press Ctrl-F5 to edit the table. Press F12 to expand the field and select more terms. Press Enter or the down arrow key, or click Add, to select additional terms for this record. Click Save to save and return to the main window. Multiple terms are separated by double dashes (--). Press Ctrl-Delete to remove data from the field.
	Standard Date	Enter only valid dates in a MMDDYYYY format, e.g., 01/23/2006. In Add, Copy, or Modify modes, press F4 or click the calendar icon to open a calendar.
	Flexible Date	Allows dates entered in various formats, such as 1910-1920, or ca. 1950. You can enter the date or press F12 to open the flexible date entry screen. The flexible date entry allows you to enter a beginning and ending date by century or year, month, and day. It includes a user-built table of modifiers, for entries such as "circa," and a choice of AD or BC. Use flexible dates when exact dates are unclear. For more information on Flexible Date fields, refer to Section K, question 4, below.
	Memo	Enter an unlimited amount of text. Press F12 or right-click and select Zoom to expand to a larger window. Press F5 to access the AAT from any memo field.
	Formatted Memo	Begin typing, press F12 or right-click and select Zoom to expand the field. Formatted memo fields can include up to sixteen subfields. Each of the subfields can be of any field type. Press Tab to move through the subfields.

	Repeating Formatted Memo	Begin typing, press F12 or right-click and select Zoom to expand the field. Repeating formatted memo fields can include up to sixteen subfields in repeating sets displayed in a grid. Each of the subfields can be of any field type. Press Tab to move through the grid. Press Ctrl-Tab to exit the grid and select <u>Save and Close</u> . With <u>Save and Close</u> highlighted, press enter to save your changes or click <u>Save and Close</u> or <u>Save</u> . When saved, an underline _ separates terms, and double bars separate rows.
	Lexicon	As you type, the word will complete from a lexicon authority table. Press the F5 key to browse the lexicon and select a term from the list. Press Ctrl-Del to remove data from the field.
	Patron ID	Links to the Names and Addresses submodule. You can enter multiple terms. Begin typing or press F5 to select from the Names and Addresses table. Note: If there are no entries in the table, you will need to add names before using these features. Press Ctrl-F5 to add to and edit the table. Press F12 to expand the field and select more terms. Press Enter or the down arrow key, or click <u>Add</u> , to select additional names for this record. Click <u>Save</u> to save and return to the main window. Multiple terms are separated by double dashes (--). Click the Record Link icon  to view the full Names and Addresses record. Press Ctrl-Delete to remove data from the field.
	Artist Name	Links to the Artist/Maker/Eminent Figure submodule. You can enter multiple terms. Begin typing or press F5 to select from the Artist table. Note: If there are no entries in the table, you will need to add names before using these features. Press Ctrl-F5 to add to and edit the table. Press F12 to expand the field and select more terms. Press Enter or the down arrow key, or click <u>Add</u> , to select additional names for this record. Click <u>Save</u> to save and return to the main window. Multiple terms are separated by double dashes (--). Click the Record Link icon  to view the full Artist record. Press Ctrl-Delete to remove data from the field.
	Exhibit ID	Links to the Exhibits submodule. As you type, the program will autofill the entry from the Exhibits submodule. Press F5 to select from the table. Note: If there are no entries in the table, you will need to add entries before using these features. Press Ctrl-F5 or right-click and choose Browse Authority Table to edit/add Exhibit records. To choose an entry from the table, highlight the entry and press Enter, or click Select. Click the Record Link icon  to view the full Exhibit record. Press Ctrl-Delete to remove data from the field.
	Loans In ID	Links to the Loans In submodule. As you type, the program will autofill the entry from the Loans In submodule. Press F5 to select from the table. Note: If there are no entries in the table, you will need to add an entry before using these features. Press Ctrl-F5 or right-click and choose Browse Authority Table to edit/add Loans In records. To choose an entry from the table, highlight the entry and press Enter, or click Select. Click the Record Link icon  to view the full Loans In record. Press Ctrl-Delete to remove data from the field.
	Loans Out ID	Links to the Loans Out submodule. As you type, the program will autofill the term from the Loans Out submodule. Press F5 to select from the table. Note: If there are no entries in the table, you will need to add an entry before using these features. Press Ctrl-F5 or right-click and choose Browse Authority Table to edit/add Loans Out records. To choose an entry from the table, highlight the entry and press Enter, or click Select. Click the Record Link icon  to view the full Loans Out record. Press Ctrl-Delete to remove data from the field.

2. *What is the purpose of the authority tables in the program?*

Authority tables (also called pick lists or lookups) shorten data entry time. Tables are alphabetized lists of acceptable terms for a field. When you start typing, the program “autofills” the matching term from the table. You can also press F5 to view and select terms from the table. Type the first letter of a word to move through the table. To choose an entry from the table, highlight the term and press the Enter key.

Tables also provide standardized terms for consistency, making your data more accurate by reducing typographical errors. If you have the appropriate security rights, you can add, modify, or delete terms in a user-built table. The security function allows you to control the number of staff who can update authority tables, so you can maintain consistent terms.

Locked authority tables provide consistent entries on a service-wide basis. Locked authority tables are used for fields such as Object Status and Condition that provide information on service-wide collections status.

3. *How do I add, edit, or delete terms in an authority table?*

Press Ctrl-F5 or right-click and choose Browse Authority Table to access the table. Select a term in the list, then click the Add Term, Edit Term, or Delete Term link for the action you want.



Enter the data you want to appear in the table on the Term field. Optionally, include a Description of the term, and an Extended Description. Click the Save Change link to save your change to the authority table.

4. *What is a Flexible Date field?*

Flexible Date is a field type that allows you to enter date information in a variety of formats. Flexible date fields also allow you to enter partial dates, such as a month and year.

The symbol for a flexible date field is . There are several flexible date fields in the program. They include Manufacture Date, Collection Date, and Identified By Date.

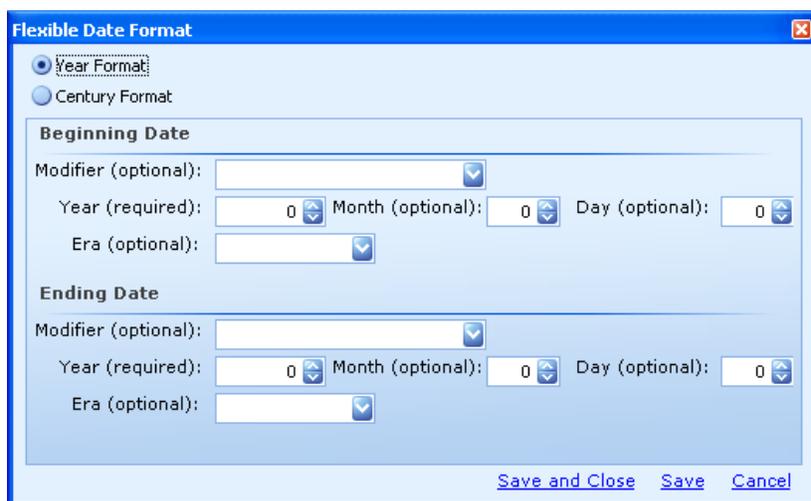
5. *Do I have to use the flexible date format?*

No. You can enter a valid date format directly into the field, such as 01/23/2006. Valid formats include 23JAN2006; Jan. 23, 2006; and Jan. 2006. If you press F12 to expand the flexible date field, it will translate such entries into the 1/23/2006 format. If the date you enter is in a valid format, simply tab to the next field.

The program will not translate two-digit year entries to four-digit years. For example, the entry 12/12/98 will not become 12/12/1998.

6. *How do I use the Flexible Date Format window?*

Press F12 or click the  icon to open the Flexible Date Format window.



- Select either Year Format or Century Format
- Complete the Beginning Date and (optional) Ending Date fields with the date information you have available.
- Click the Save and Close link to save your data and close the Flexible Date Format window.

You can enter a Beginning Date, for example the earliest date when an object was manufactured. You can also enter an optional Ending Date, for example the last know date when an object was manufactured. Beginning Date and Ending Date have the same set of fields. They are:

For Year Format:

- Modifier, a user-built authority table
- Year, a simple text field allowing only a 4-digit year
- Month, a simple text field allowing only a 2-digit month
- Day, a simple text field allowing only a 2-digit day
- Era, a user-built authority table

For Century Format:

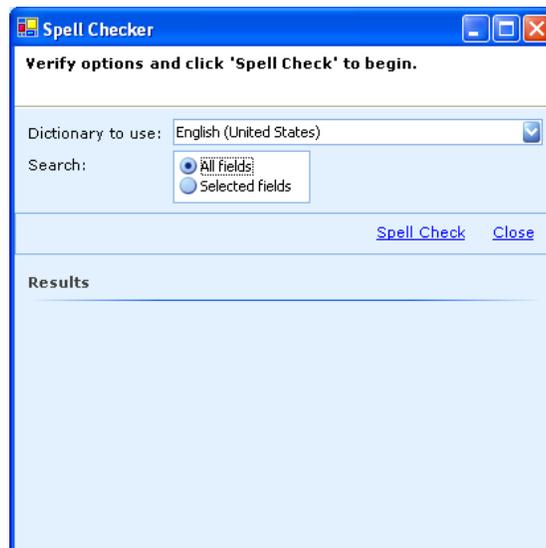
- Modifier, a user-built authority table
- Century, a user-built authority table
- Era, a user-built authority table

7. *What fields allow me to use Spell Check?*

You can use Spell Check for all memo fields within the catalog records and the associated modules. Numeric fields, date fields, and fields controlled by authority tables are not checked by Spell Check.

8. *How do I activate Spell Check?*

To activate Spell Check, select Spell Check from the Tools menu. The Spell Checker window opens.

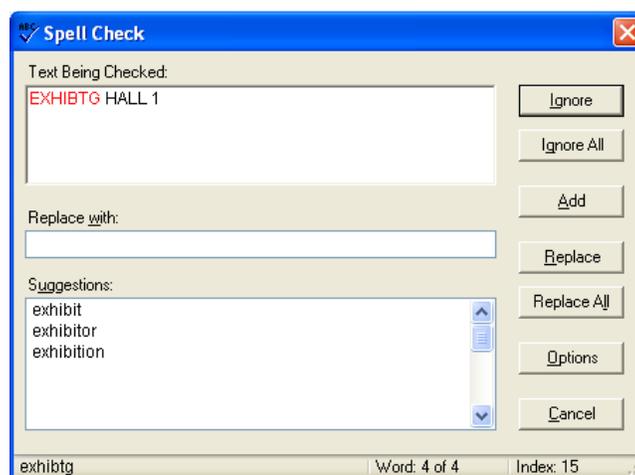


9. *How do I use Spell Check?*

First, select a Dictionary to use. The default dictionary is United States English, but other dictionaries are available from the pull-down menu. Next:

- choose to check All Fields and click the Spell Check link, or
- choose to check Selected Fields. Then select the field(s) you want to check, and click the Ok link. Then click the Spell Check link

If spelling errors are found, the Spell Check window will open.



The Spell Check window shows you which word it found questionable. You can:

- Enter a corrected spelling in the Replace with field, and click the Replace button, or
- Click the Ignore button to ignore the questionable spelling, or
- Click the Ignore All button to ignore all instances of this spelling in the record, or
- Click the Add button to add this word to the dictionary, or
- Select a suggested word and click the Replace button, or
- Select a suggested word and click the Replace All button to replace all instances of this spelling in this record, or
- Click the Cancel button to close the Spell Check window

L. Using the Program

1. *What kind of help is available in the program?*

There are two types of help in the program. **Rediscovery** System Help is available under Help on the menu bar. **ICMS** field help is available on the Navigation Pane.

2. *What is **Rediscovery** System Help?*

Rediscovery system help provides assistance on how the system works. It includes how-to guidance on menu commands and functions within the program. It includes the same content as the **Re:discovery** User Manual. Click the  System Help icon on the button bar, or press F1 to open the **Rediscovery** System help.

3. *What is **ICMS** field help?*

ICMS field help provides field-by-field DOI guidance on completing the data fields on the screen. Field help is located in the Navigation Pane. The field help will tell you:

- the type of field
- what data to enter in the field
- how to enter data in the field
- whether the field is mandatory
- whether the field maps to a form or report
- whether the field maps to the Archives Module (for cultural resources archives records)

Most field help also includes examples.

4. *Should I enter data in all caps or mixed case?*

Entering data in all caps is strongly recommended, especially for authority table terms. All the terms in DOI locked tables are in all caps.

Note: For some archival fields, mixed case entries are recommended because the information will print as part of the finding aid.

5. *Do I really need to learn how to use all the different modules and functions?*

The program is comprehensive, but learning to use it is easy and worthwhile. It has been customized to perform the collections management procedures outlined in the DOI Museum Property Handbook and NPS *Museum Handbook*, Parts I and II. Use it to carry out collections management procedures that you already do. As you become familiar with the program, you'll find yourself saving more and more time.

The program is designed so that many of the functions operate in the same way. When you learn to perform one function, you will know how to do other similar functions.

For example, the process of selecting fields is the same for Quick Report, Quick Entry, and the Import and Export functions. The process for attaching collection records is the same for incoming loans, outgoing loans, exhibits, deaccessions, and restrictions.

6. *What are the most important things to remember while working in the program?*

As you work, remember to:

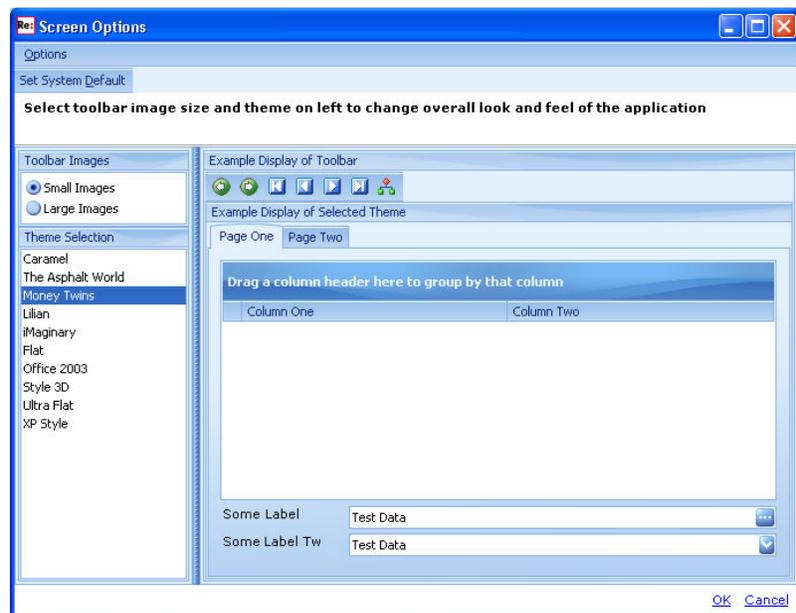
- Be aware of the mode in which you are operating: Browse, View, Add, or Modify. Check the bottom right corner of the status bar.
- Be aware of the "visible" data with which you are working. Look for active tag sets and filters indicated on the status bar.
- Know the current sort order. Check the Sort field on the button bar.

7. *Can I change the screen style and colors or button bar size?*

Yes. There are several themes available for the screen and Navigation Pane as well as two sizes for the button bar. These settings are user specific and are tied to the user login so that each person can have their own style.

To change the Screen style and button bar size:

- On the View menu, select Screen Options.

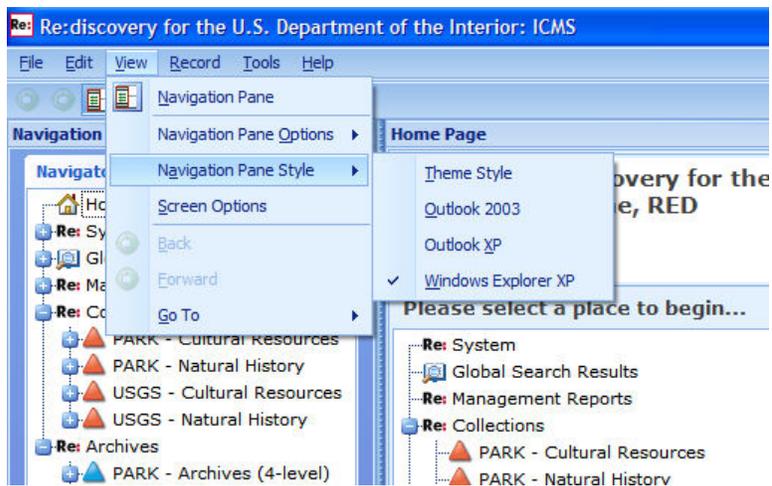


- The default theme for the screen is Money Twins. Select any style you prefer under Theme Selection. An example of the theme will be displayed on the right. These themes affect the List Pane and Record Pane only.
- To change the size of the buttons on the button bar, select either Small Images or Large Images under Toolbar Images on the left. An example of the toolbar will display on the right.
- After making your selections, click OK to save them. If you only change the theme, the screen will immediately display your new settings. If you also change the button bar size, you will have to exit the program and log back in to see the change.

Note: If you want to return to the default settings for the system, click the Set System Default on the toolbar.

You can also change the style of the Navigation Pane. To change the Navigation Pane:

- On the View menu, select Navigation Pane Style.



- There are four styles available for the Navigation Pane: Theme Style, Outlook 2003, Outlook XP and Windows Explorer XP. Select one of the styles. You will see the new setting in the Navigation Pane immediately.

Note: The Navigation Pane in the single record window has its own setting. Change it the same way as above if you want them to match.

8. *What do I do next?*

You are ready to use the system. How you plan to use **ICMS** will determine what you should do next.

If you...

need to locate information

are a cataloger

are responsible for the database

Then...

become familiar with word searches. Refer to Chapter 7, Finding and Grouping Records, for additional help on word searches.

turn to Chapter 2, Cataloging. Read through the instructions for cataloging the type of objects that you have.

Read Chapter 8, Moving and Sharing Data, and Chapter 9, Tools.