CHAPTER 7: FINDING AND GROUPING RECORDS

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I. WORD SEARCH

A. Overview

1. *What is Word Search?*

Word Search is the fastest, most powerful search option in **ICMS**, yet very simple to use. The way you phrase your search is similar to search engines you use on the internet with some additional tools for searching in a database program. You can

- search for a single word or phrase
- limit your search to a field
- limit your search to records in a Tag Set
- search all fields
- use Boolean logic such as "(Smith and Jones) not Richards"
- search for alphabetic ranges or a range of years
- use hierarchical lexicons to search for related, broader, narrower or proper terms
- search in more than one directory or type of record (catalog records, exhibit records, loan records, artist records, etc.) at a time

Word Search will find only the words from your data that have been indexed. Some words are not indexed, such as articles (a, an, and the) and prepositions. For further information about words excluded from Word Search, see Section E below. Words used for Boolean searching are permanently excluded from search: and, or, not, and to.

There are 3 search tools in the program: Quick Search, Advanced Search, and Public Search.

2. *When do I use the Word Search functions?*

Word Search is the quickest way to find any word, anywhere in your collection database. Use Word Search when you want to find records that contain a specific word or phrase. Use it alone, or to define a broad group of records that you can narrow further with a filter.

3. *What do I need to do before I run the Word Search functions?*

Word Search will automatically cancel any Tag Set you have activated. If you have a filter active when you perform a Word Search, the search will look in the entire database, but when you use your search results, the filter will still be applied. If you do not want to filter your search results, make sure to cancel the filter before or after performing your word search. See Section II of this chapter for information on filters.

Word Search works in conjunction with the Reclassify utility. Words in the database must be reclassified for the Word Search function to find them. The system automatically reclassifies records as you add, change, or delete them. Refer to Section I of Chapter 9 for information on the Reclassify utility and when you need to use it.

4. *Is Word Search case sensitive?*

No. You don't have to know the case of an entry to search for the entry. However, you must know how the word is spelled in the database. To search specific fields, you must also know which fields contain the data.

5. *Can I run a Word Search from any screen?*

Yes. Word Search is available in any module and associated module. However, only a few of the supplementals are searchable. To find information within a specific supplemental, use the Filter option instead. See Section II of this chapter for information on filters.

Note: The following types of attached multimedia files are word searchable: PDF, Word Docs (.doc and .docx), Excel files (.xls and .xlsx), and Text files (.txt). This means that when they are being attached, the program "scans" them to add the words they contain to the word search index automatically.

6. *Can I set a filter within my word search results?*

Yes. Refer to Section II of this chapter for information on setting a filter.

7. *Can I search more than one collection at a time?*

Yes. In Advanced Search, use the Where To Search tab to select directories, modules and associated modules to search. See Section C below for information on Global Search.

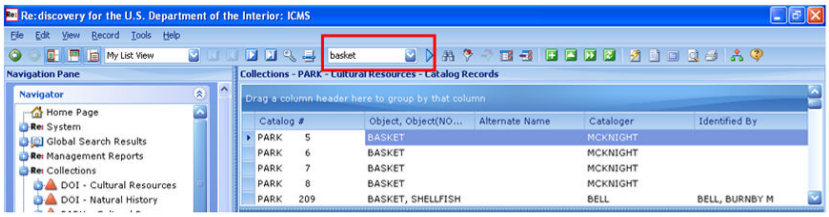
B. Quick Search

1. *What is Quick Search?*

Quick Search allows you to type your search directly into the Button Bar rather than bringing up the Advanced Search Screen. Use Quick Search to do a basic search in the type of records you are currently viewing (catalog records, accession records, artist records, exhibit records, etc.).

2. *Where is Quick Search located?*

The Quick Search box is located on the button bar in any module and associated module you are viewing.



3. *How do I perform a Quick Search?*

To perform a Quick Search:

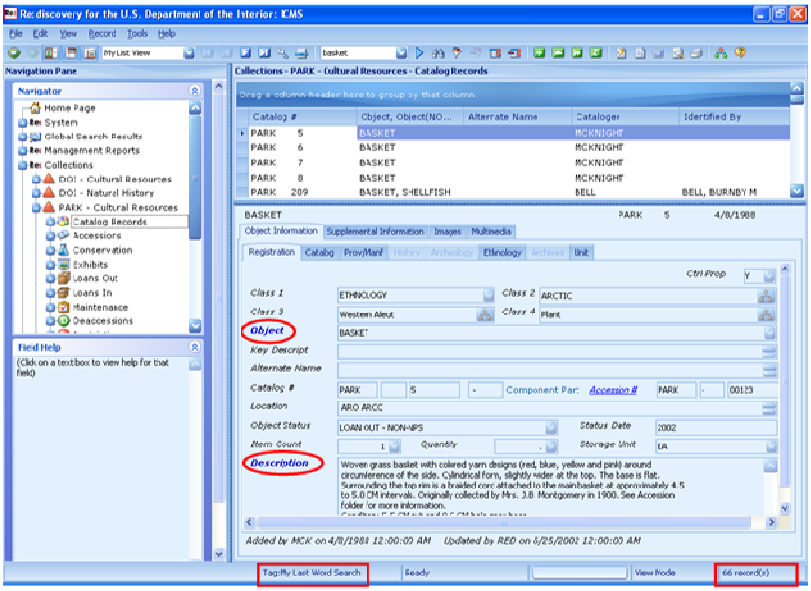
- Type your word or phrase into the Quick Search box on the button bar.

Note: To search for a phrase, put quotations around the words to keep them together. Otherwise, the system will insert an 'and' between words when searched. Both words would appear in the record, but they may not be in the same field or order you type them. For additional tips on how to phrase your searches, refer to Section C below, Advanced Search.

- Press Enter or click the Quick Search launch button next to the Quick Search box.

- The system will load your search results into the main screen. The Status Bar will include "Tag: My Last Word Search", and the number of records returned by the search. Your "visible data" now includes only

the records found by the search, held in a temporary Tag Set. This Tag Set will remain active until you deactivate it, or until you perform another search. To save this temporary Tag Set for future use, see Section III of this chapter.



- The field label for **each field** in the record that contains your keyword(s) will be italicized in blue. This creates a visual cue for the user. The italicized blue field labels remain as long as the Word Search results tag set is in use. The italicized blue field labels will return to standard appearance if you exit the catalog screen, cancel the tag set, or perform another Word Search.

- To deactivate the "My Last Search" Tag Set and return to all records, click the Deactivate Tag Set button on the button bar or select Deactivate Tag Set on the Record Menu.

Quick Search remembers previous keyword(s) searched. If you click the down arrow on the quick search box on the button bar, you will see your previous quick searches. You can select any of these keywords to perform the same search again.

C. Advanced Search

1. *What is the different between Quick Search and Advanced Search?*

Advanced Search allows you broaden your search criteria to include other submodules, directories, and modules as well as related terms from the hierarchical lexicon in your search. You can also limit your search to a specific field and view the concordance list of words in your data.

2. *How do I access the Advanced Search function?*

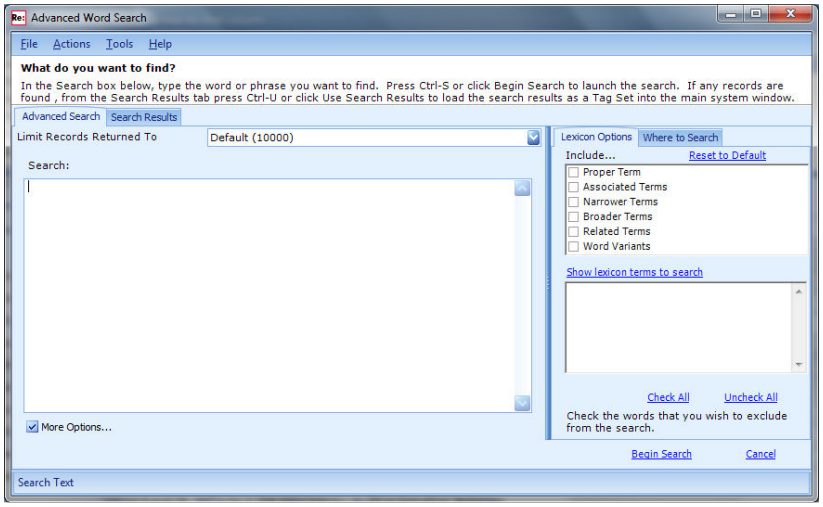
Advanced Search can be accessed from the button bar, menu bar and by using a shortcut key.

- On the button bar, click the Advanced Search button , *or*

- On the menu bar, select Advanced Search on the Record menu, *or*

- Press Alt-8 on your keyboard.

The Advanced Search window will open.

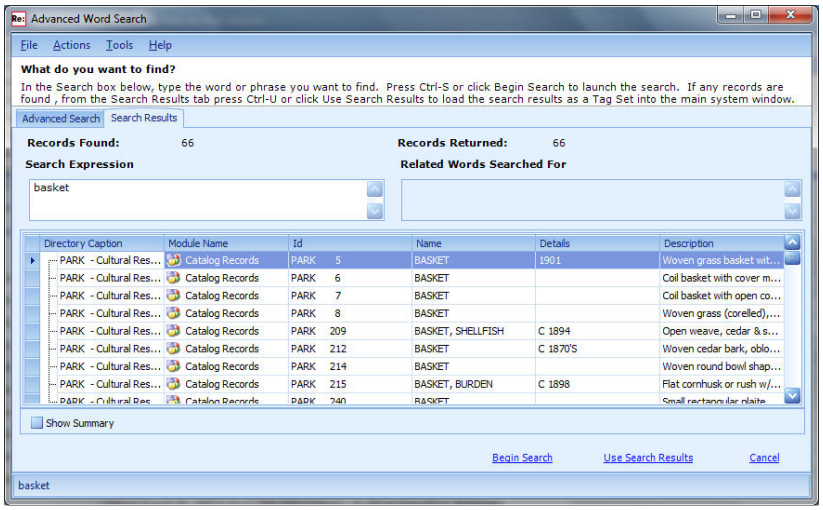


3. *How do I perform a basic word search in Advanced Search?*

To perform a basic Advanced Search:

- In the Advanced Word Search window, type the word or phrase you want to find in the Search box.

- Press Ctrl-S or click Begin Search to launch the search.



- The Search Results tab displays:

  – The number of records found.

  – The number of records returned (very large databases may initially display only a portion of the results in order to respond more quickly).

  – The word or expression you searched for.

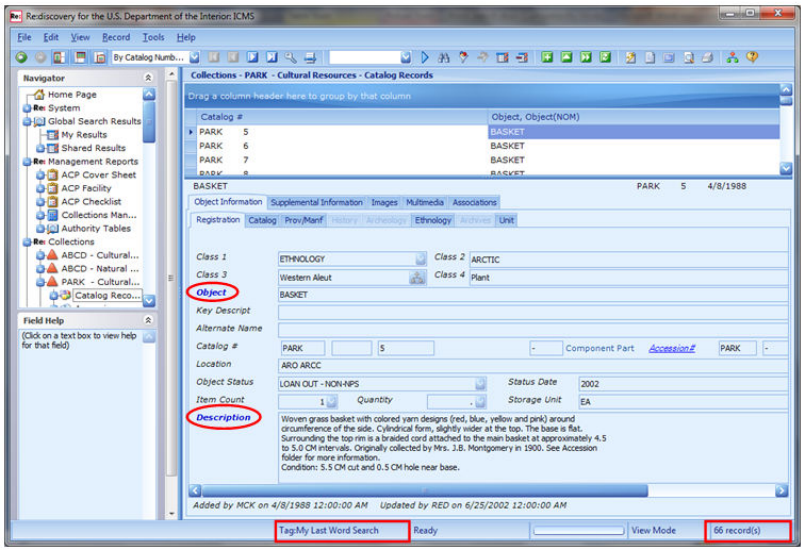
– Related words searched for, if you used Lexicon Options, a date range, or wildcard searching.

– A list of the records found

- To revise the search, type any changes in the Search Expression box and press Ctrl-S or click Begin Search.

- To view any of the found records, double-click that record in the list. The record will open in a separate window.

- To use the search results and see all records that match, press Ctrl-U or click Use Search Results. The system will load your search results into the main screen. The Status Bar will include "Tag: My Last Word Search", and the number of records returned by the search. Your "visible data" now includes only the records found by the search, held in a temporary Tag Set. This Tag Set will remain active until you deactivate it, or until you perform another search. To save this temporary Tag Set for future use, see Section III of this chapter.



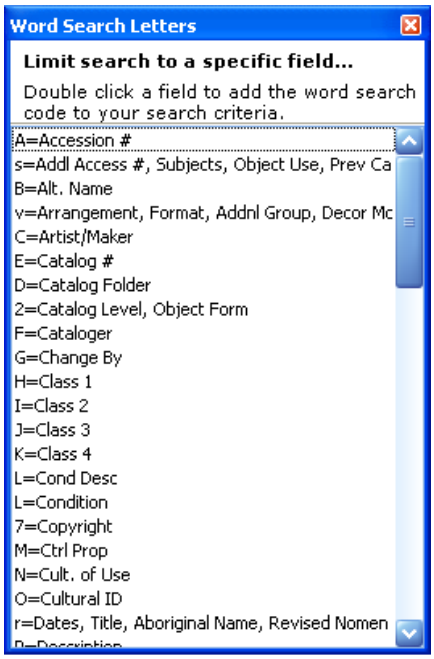
- The field label for **each field** in the record that contains your keyword(s) will be italicized in blue. This creates a visual cue for the user. The italicized blue field labels remain as long as the Word Search results tag set is in use. The italicized blue field labels will return to standard appearance if you exit the catalog screen, cancel the tag set, or perform another Word Search. If you limit your search to a particular field, the program will still italicize the labels for all fields containing your keyword(s) even those not part of the search string.

- To deactivate the "My Last Search" Tag Set and return to all records, click the Deactivate Tag Set button on the button bar or select Deactivate Tag Set on the Record Menu.

4. *How can I search in a specific field?*

To limit your search to a specific field in you data:

- In the Advanced Word Search window, press F11 or select Search Fields on the Tools menu. The field list will appear.



- Select the field you want to search and double-click it to add the word search code to the Search box. For example, if you want to search the object name field only for the keyword, scroll down in the list to find Object, Object(NOM) in the list and double click it. The code f= will be placed in your Search box.

- You can leave the Word Search Letters box on the screen while you enter your search terms in case you want to select another field to search. To close the Word Search Letters box, click the X in the upper right corner.

- Then enter your keyword or phrase after the f= in the search box. Do not enter a space after the =. For example, f=basket.

- Press Ctrl-S or click Begin Search.

- The Search Results tab displays the records where the keyword or phrase was found in the specific field.

- To use the search results, press Ctrl-U or click Use Search Results. The records found will be loaded into your main screen.

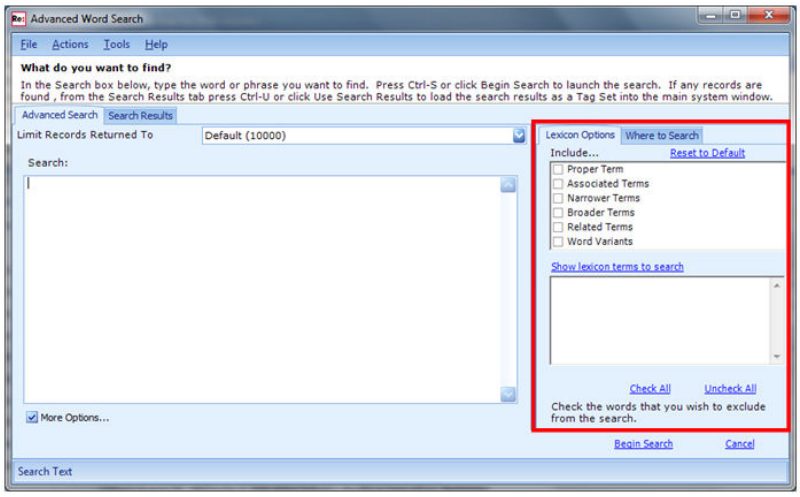
Note: All fields where the keyword(s) were found will be italicized regardless of your search criteria limiting it to a specific field. But the results will be only those records where the word was found in that specific field.

5. *How can I use the lexicons in the program to extend a word search?*

You can use the lexicons within the program to specify terms that you want to add to a search. Using terms within the lexicon, you can extend your search to proper, associated, narrower, broader, and related terms. These relationships are defined by the Lexicon module, which may include terms from the *Art & Architecture Thesaurus*, the *Nomenclature 3.0*, or other naming systems.

To extend a word search using a lexicon:

- When More Options at the bottom of the Advanced Search window is checked, Lexicon Options become available.



- Enter a keyword or phrase in the search box.

- Select any or all of the lexicon options to include:

  Proper Term will look for the word you enter, plus the proper usage of the word. For example, if you search for IMPRESSIONISM, Advanced Search will also look for IMPRESSIONIST.

  Associated Terms will look for the term you enter, plus any terms associated with it, according to the lexicon available in your system.

  Narrower Terms will look for the term you entered, plus narrower terms as defined by your lexicon.

  Broader Terms will look for the term you entered, plus broader terms as defined by your lexicon.

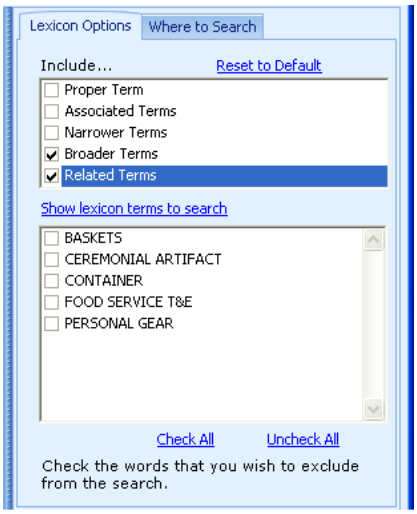
  Related Terms will look for the term you entered, plus any Related terms as defined by your lexicon.

  Word Variants will search for variations of a word – e.g., plurals and tenses. **Note:** this feature does not use the lexicon module in ICMS.

- To clear the lexicon terms to include, click Reset to Default.

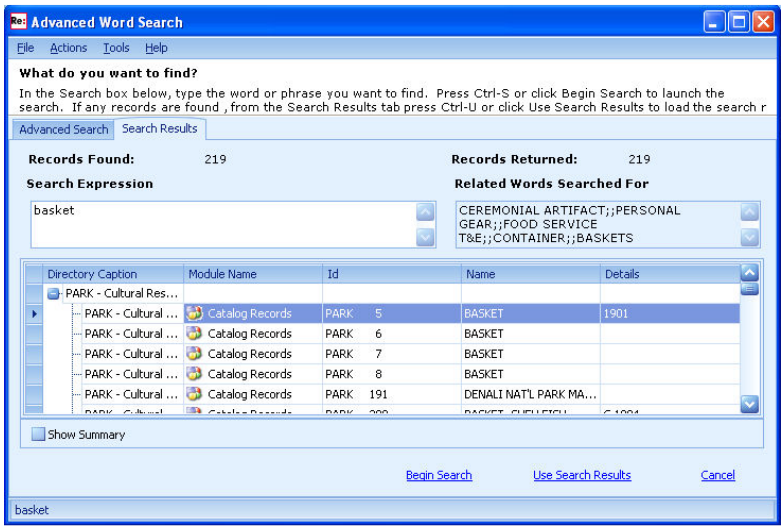
- When you have selected lexicon options to include, you can see a list of the lexicon terms that will be searched by clicking Show lexicon terms to search. The list of terms will appear in the box.

For example, if you type basket in the Search box, select lexicon options to include and then click Show lexicon terms to search, the system shows you which terms from the lexicon will be searched for in your records.



You can check words in this list that you want to exclude from the search.

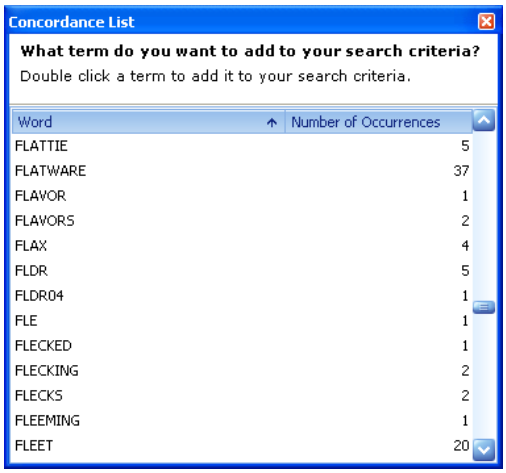
- After selecting the lexicon options, press Ctrl-S or click Begin Search.
- The Search Results tab will show all the related words that were searched.



6. *How can I see a word index of all the terms in my data?*

To view the concordance list of all words indexed in your current data (catalog records, accessions, exhibits, etc):

- Press F5 or select Concordance List on the Tools menu.



- These are all the words in your searchable data with the exception of the list of excluded words. This list shows the term and the number or occurrences of the term in your data.

Note: The number of occurrences is not the number of records but the number of times the word appears in your data. So the term could be mentioned several times in one record.

- To quickly locate a word or section in the list, start typing the term and you will be taken to that section of the list.

- To use one of the terms in the list in your search, double click it to add it to your search box.

- To close the Concordance List, click the X in the upper right corner.

Note: The Concordance List is also an excellent way to find misspellings in your data, search for the misspelling and then correct the records.

7. How can I add conditions to a word search?

In the Advanced Word Search window, select Search Tips from the Help menu to view tips on adding conditions to a search. You can create a more complex and limited search by combining words as follows:

Phrase Search

Place double quotation marks around any words you want to search as a phrase. For example, "Bull Run". Word Search will find records where those words appear in that combination. Without the quotes, Word Search will search for Bull AND Run, finding records that contain both words, but not necessarily in combination.

Boolean Search

Boolean logic, using the conditions AND, OR, NOT and TO can help you expand or refine your Word Search.

For example:

- **AND:** To match, the record must include both words. BRASS AND BUTTON will find records that include both words, whether or not they appear next to each other. Including additional AND conditions will reduce the number of records that match. You can use a + (plus sign) in place of the AND.

- **OR:** To match, the record must include one or the other of the words, or both. BRASS OR SILVER will find records with BRASS, records with SILVER, and records with both terms. The OR condition will usually find more records than an AND condition.

- **NOT:** To match, the record must not include the word. VIRGINIA NOT "WEST VIRGINIA" will find any record with Virginia, but exclude those with West Virginia. You can use a – (hyphen) in place of the NOT.

- **AND NOT:** The same as **NOT.**

- **TO:** Allows you to search for an alphabetic or an alpha-numeric range. For example, B TO F will find every word that begins with B, C, D, E, and F. Searching for 3 TO 49 will search for every word (or string of characters) that begins with 3 through 49 so it will find 30003, 48FN6, 47", 6, 10/31/1963 (because of the 31 in the date), etc.

- **OR NOT:** To match, the record must include either the word that precedes OR NOT, or excludes the word that follows OR NOT. For example, GEORGE OR NOT WASHINGTON will find all records that either include GEORGE, or that don't include WASHINGTON.

- **Combine conditions using parentheses**. (BRASS OR SILVER) AND BUTTON will find records with the word button, but only those that also contain the word brass or silver.

Note: When using Boolean logic and searching specific fields, use the search field code for each keyword. For example, if the code for the Material field is M and the code for the Object field is O, you might create a search like this: (M=BRASS OR M=SILVER) AND O=BUTTON. This search will find only records where the object name is button, and the material field contains either brass or silver.

8. *How can I search for a range of dates?*

You can use two formats to search for ranges of dates:

- 1800**..**1900
- 19th Century

Both of these examples will find records that include any year from 1800 to 1900.

Note: Do not use TO between dates as this function is an alpha-numeric function and you will get results that would include 19 instead of actual years. Always use the **..** (two periods) to search for year ranges.

In a flexible date field, circa dates are defined as 10 years on either side of the date specified and you may enter the circa date using any of the following variations

- Circa or circa
- Ca or ca
- Ca. or ca.
- C or c
- C. or c.

If you enter Circa 1850 in a flexible date field, word search will find that record if your search phrase contains any of the dates between 1840 and 1860. For example: Word search will find a record with C. 1850 in a flexible date field if you search for 1825..1845.

9. *What wildcard options are available?*

Use asterisks and question marks to expand the scope of your search. This is helpful when you are unsure of the spelling. For example:

Use the asterisk if you know the first or last few letters of a word. The asterisk can be placed at the beginning or end of a character string.

- Fitz* will find all occurrences of Fitzgerald, Fitzhugh, Fitzpatrick, etc.
- *ington will find all occurrences of Arlington, Paddington, Washington, etc.

Use the question mark in place of letters if you are unsure of how the word might be spelled or you anticipate that it was spelled in multiple ways.

- Min?r will find all occurrences of Miner and Minor.
- Acet??? will find all occurrences of 7-letter words beginning with "acet", such as acetate and acetosa, but will not find occurrences of acetabulum or acetic since these are not 7-letter words.

10. *How can I search within a Tag Set?*

You can limit the search to the records in an existing Tag Set by phrasing it as @TagSetName and keyword. The Tag Set does not have to be active to use this search method. When the name of your Tag Set contains a space (is a phrase), you will need to use quotation marks around the Tag Set name. Also, if you are searching for a phrase, remember to include quotation marks around your phrase.

- @buttons and brass: This will find all records containing the word brass in the Tag Set called Buttons.
- @buttons and "silver plated": This will find all records containing the phrase "silver plated" in the Tag Set called Buttons.
- @"uniform buttons" and "silver plated": This will find all records containing the phrase "silver plated" in the Tag Set called Uniform Buttons

11. *Can I use special characters in my search?*

Yes. You can use the following special characters when searching:

- - (the minus symbol), meaning "NOT"
- + (the addition symbol), meaning "AND"
- Accents and diacritical characters, such as those included in the Windows Extended Character Set, for example the umlaut in "Emily Brontë". To include them in your search phrase, press Ctrl-Insert or right click in the search window and select Extended Character Set off the right-click menu. Select the character in the Character Map list, then click Copy. Close the Character Map window and in your Search box, press Ctrl-V or right click and choose Paste on the right-click menu. The special character will appear in your search box.

12. *What other search options are available?*

The additional search options available are Adjacent searches and Did you mean?

Adjacent search

In addition to searching for whole words, and phrases, you can also search for words that are close to one another. Use the expression "WITHIN 10" to define how close the words are to one another. For example, CAMERA WITHIN 5 DIGITAL will find all records where DIGITAL is found within 5 words of CAMERA.

Did you mean?

If your search finds no records, the Did you mean… box will appear at the bottom of the Advanced Search page. Use the pull-down menu to select a substitute word to correct or refine your search. Word Search will show you one or more suggested terms. Choose a term from the menu and click the Substitute Word link to modify your search phrase. Then begin the search again.

13. *How do I revise a word search?*

To revise a word search:

- In the Advanced Search window, select Revise Last Search on the File menu.
- Your last search string will appear in the Search box. Use this option to repeat or revise your last search. The software remembers your last search phrase until you exit the program.

Note: If you always want to revise your last search so your previous search phrase always appears when you open Advanced Word Search, select Always Revise Last Search from the File menu. The software remembers your last search phrase until you exit the program.

14. *How do I save Word Search keywords to use again later?*

Saving Word Search keywords may be useful if the keyword string is long or difficult to reproduce. To save the keywords in a word search:

- In the Advanced Search Window, enter your search string.
- From the File menu, select Save Keywords.
- Enter a name for the keywords and description if desired. You can also select whether to allow others to use the saved keywords or only you.
- Click OK. The keywords are now saved for future use.

15. *How do I get word search keywords that I've saved?*

To use word search keywords that you saved:

- In the Advanced Search Window, choose Open Keywords on the File menu.
- A list of the saved keywords will be displayed. Highlight the keyword name you wish to use and click OK.
- The keywords will appear in your Search box. Press Ctrl-S or click Begin Search, to search for these keywords. **Note:** You can also modify these keywords before searching if desired.

16. *Can I revise a keyword file?*

Yes. You can open a saved keywords file and make modifications. After you have made the changes:

- Choose Save Keywords on the File menu to overwrite the current keyword file, *or*
- Choose Save Keywords As on the File menu to save the new keywords in a different file.

17. *How do I delete saved keywords?*

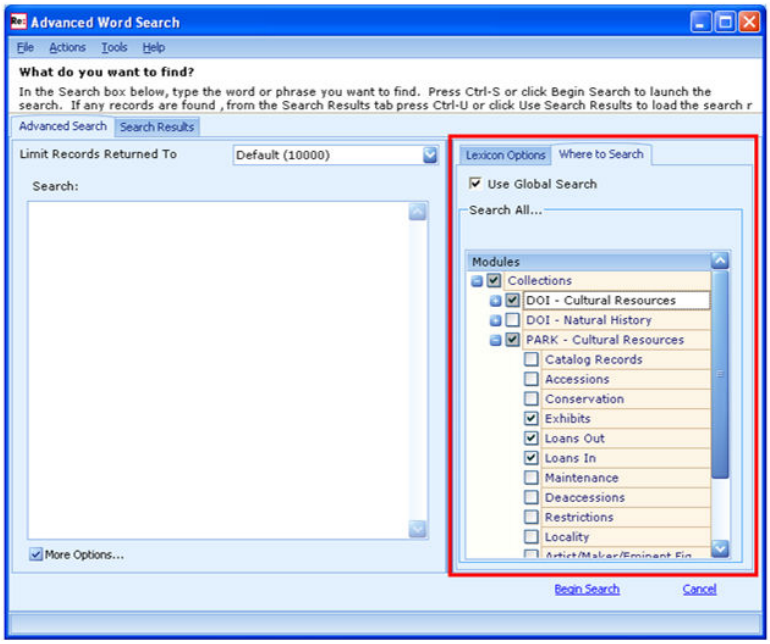
To delete keywords that you saved:

- In the Advanced Search Window, choose Open Keywords on the File menu.
- In the list of saved keywords, highlight the one you wish to delete and click Delete.

D. Global Search

1. *How do I search in more than one directory or associated module?*

When More Options at the bottom of the Advanced Search window is checked, Where to Search becomes available. By default, the software will search only the current table (such as Catalog Records, Accessions, etc.) in the current directory. Use Where to Search to select additional areas to search.



To search in more than one table or directory:

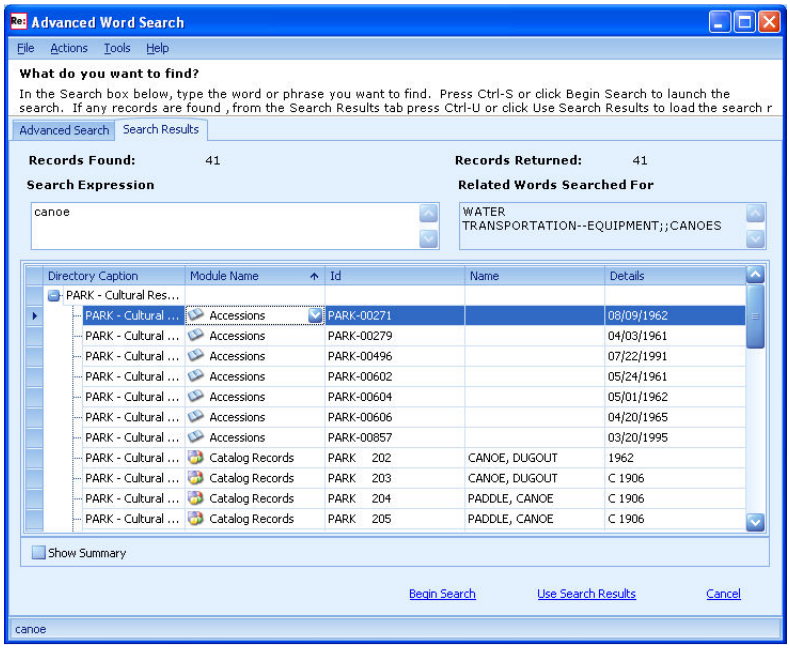
- In the Advanced Word Search window, enter your search words in the Search box.
- Then, select the Where to Search tab. **Note:** If you do not see the Where to Search tab, make sure that More Options is checked at the lower left of the window.

- In Where to Search, check the Use Global Search box. This will allow you to select multiple tables to search.

- The Search All box displays all available modules. Expand the list of modules to select other directories and associated modules available in your system by clicking the + in front of the module or directory. Select the directories and/or associated modules you wish to search by checking the box in front of it. If you check the box for an entire directory, all tables (catalog records, loans, exhibits, etc.) within that directory will be searched.

- Press Ctrl-S or click Begin Search to start the search.

When you use the Where to Search option to include other records, the Search Results tab displays the location of the records found in the list.



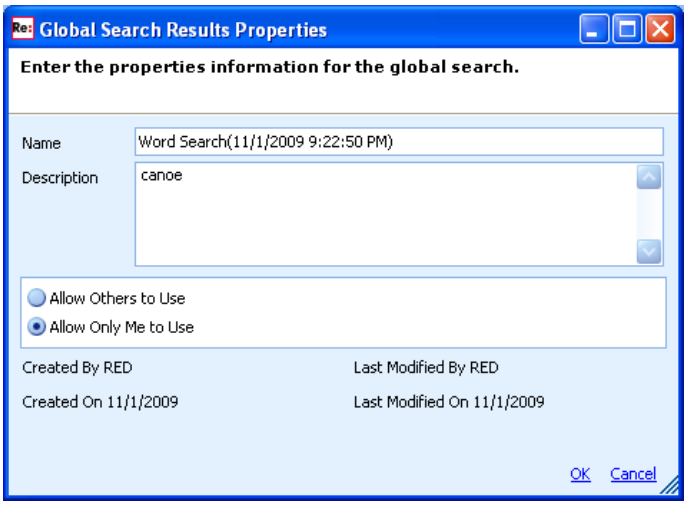
The directory name is displayed along with the module name where each record was found.

2. *How do I save the Global Search results?*

To save Global Search results:

- After performing your global search, press Ctrl-U or click Use Search Results.

- The program will prompt you to fill in some information about the global search such as a name and description and whether you want to share these results with other users.

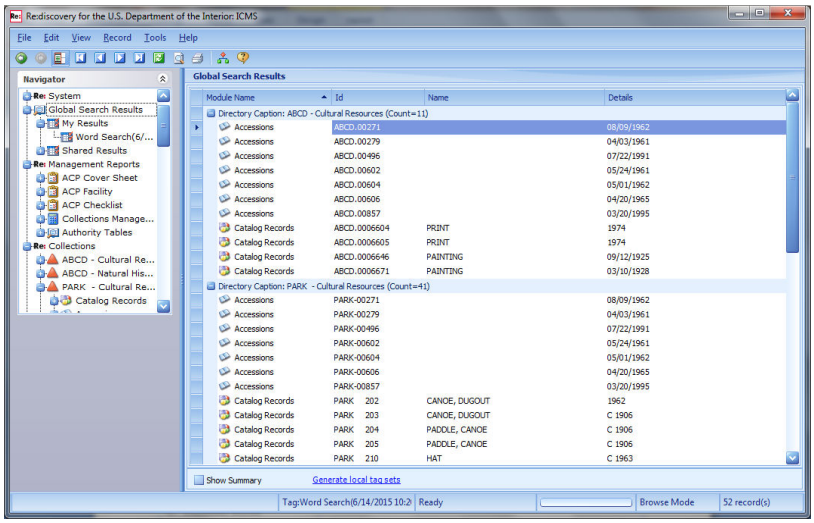


Note: By default the name and description will be the date/time of the search and the search words. You can change these if desired.

- Click OK to save the results. The list will open on the main system. The Status Bar displays the name of the Global Search Result and the number of records. **Note:** To view an individual record, double click it in the list and the record will open in a separate window.

3. *How can I view my Global Search results that I've saved?*

All Global Search Results are stored under Global Search Results in the Navigation Pane. Expand the tree for My Results or Shared Results and select a Global Search tag. The records will display in the Global Search Results pane on the right.

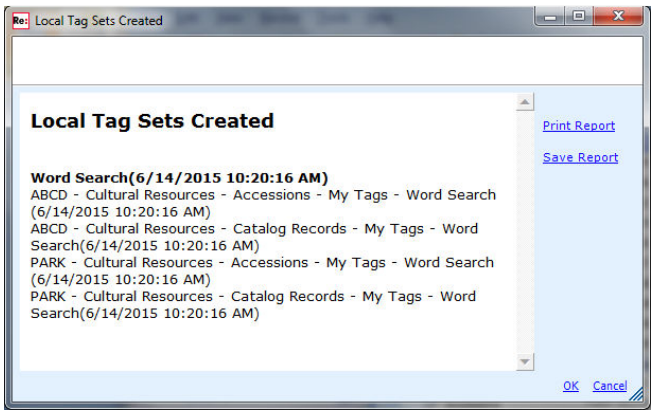


The Status Bar displays the name of the Global Search Result tag and the number of records it contains. Select the Show Summary box to show a more detailed summary of the records.

4. *How can I run reports or mass updates on the results of a Global Search?*

You may want to run reports or perform mass updates on the records from a global search. To do this, you will need to view the records in their individual directories. Use the Generate local tag sets option at the bottom of the global search results window to create the individual tags in each directory and associated module.

A report of the tags created will appear indicating the location and name of each. You can then print or save the report for reference using the Print Report or Save Report options.



Once these tags are created, you can go to the specific directory and associated module and activate that tag set to use those records.

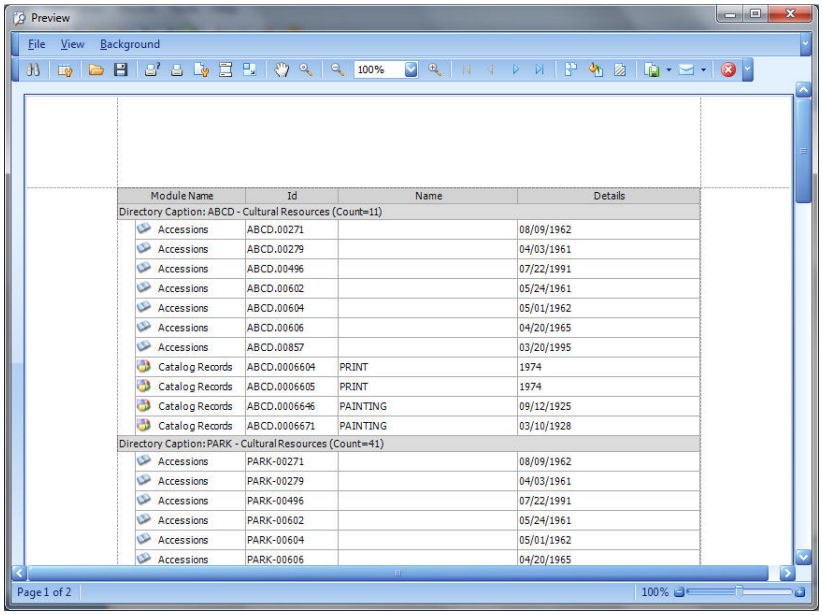
5. *Can I print the Global Search Results list?*

Yes, you can print the global search results list using the Print Preview or Print List options.

- From the Global Search Results window, go to the File menu and select Print Preview or click the Print Preview button on the button bar.

  Or, to send it directly to the printer without previewing, select Print List from the File menu or button bar .

- Print Preview will generate the report and open the Preview window



Module Name	Id	Name	Details
Directory Caption: ABCD - Cultural Resources (Count=11)			
Accessions	ABCD.00271		08/09/1962
Accessions	ABCD.00279		04/03/1961
Accessions	ABCD.00496		07/22/1991
Accessions	ABCD.00602		05/24/1961
Accessions	ABCD.00604		05/01/1962
Accessions	ABCD.00606		04/20/1965
Accessions	ABCD.00857		03/20/1995
Catalog Records	ABCD.0006604	PRINT	1974
Catalog Records	ABCD.0006605	PRINT	1974
Catalog Records	ABCD.0006646	PAINTING	09/12/1925
Catalog Records	ABCD.0006671	PAINTING	03/10/1928
Directory Caption: PARK - Cultural Resources (Count=41)			
Accessions	PARK-00271		08/09/1962
Accessions	PARK-00279		04/03/1961
Accessions	PARK-00496		07/22/1991
Accessions	PARK-00602		05/24/1961
Accessions	PARK-00604		05/01/1962
Accessions	PARK-00606		04/20/1965

In the Preview window, you have options to add headers, change margins and paper orientation as well as export or email the report in various file

formats. Click the Print or Print Direct button on the toolbar to send the list to the printer.

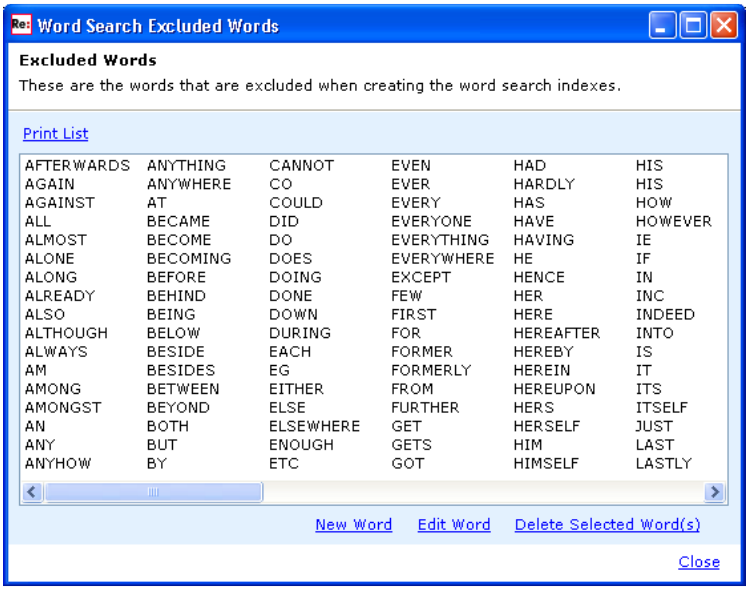
E. Excluded Words

1. *Does Word Search find every word in my data?*

No. There are common words that are excluded from word search such as articles (a, an, the) and prepositions.

2. *Where can I view a list of the Excluded Words?*

To view the list of excluded words, in the Advanced Search window, select Excluded Words from the Tools menu.



3. *Can I remove or add words to the excluded words list?*

Yes. In the Excluded Words list:

- To add a word to exclude, click New Word. A new box will open at the end of the list. Enter the new term and press enter.
- To delete an excluded word so that it will be searchable, highlight the word in the list and click Delete Selected Word(s).
- You can also modify words in the list. Highlight the word and click Edit Word.

Note: After you have added, modified or deleted words in the Excluded Words list, you must Reclassify and Sweep the directory for Word Search to record the changes. Refer to Chapter 9, Tools, for information on Reclassify and Sweep.

4. *Can I print the list of Excluded Words?*

Yes. In the Excluded Words list, click Print List. A preview window of the list will open. In the Preview window, click the Print or Print Direct button on the toolbar to send the list to the printer.

F. Public Search

1. *What is Public Search?*

Public Search is intended for research access to your main collection data. It lets people with little or no Re:discovery experience query the data for

research purposes and limits the information that they can view. Public Search turns your computer into a local host by using your default Internet browser, as defined by your computer's registry. The Public Search interface is similar to search engines on the Internet and so is familiar to most users. Public Search is available in Collection and Archives directories. Associated module data, such as Accessions, Loans, Exhibits and Names and Addresses, are not available through Public Search.

2. *How do I access Public Search for a directory?*

To access Public Search for a directory,

- Select the directory node in the Navigation Pane first. **Note:** Public Search is only available when the directory is selected, not catalog records, accessions or other module records.

- Select Public Search on the Tools menu and the Public Search window will open.

- Click Start Public Search. Your internet browser window will open for you to begin searching the directory.

Note: You do not have to be connected to the Internet to use Public Search. Public Search only uses the Internet browser window to display the pages.

For further information on how to use and configure Public Search, see Appendix D.

II. FILTERS

A. Overview

1. *How do the Filter functions work?*

The Filter functions search every record in your visible data for records that contain field values that match the conditions or values you request.

There are three kinds of filters:

Quick Filter
Advanced Filter
Built In Filters

You can apply Filters on top of Tag Sets to further limit the scope of your visible data.

2. *When do I use the Filter functions?*

Use the Filter functions when you want to search for data in specific fields or combinations of fields. For example, you may wish to see only the records entered by cataloger "Smith" during fiscal year 1998. You can also use filters to get a range of catalog numbers and locate specific supplemental records such as the Catalog Notes supplemental for "recataloged" records.

Because you can set conditions on filters, use them for complicated searches that you can't easily do using Word Search.

3. *What do I need to do before I use the Filter functions?*

You must know exactly how the value(s) you want to filter against appears in your data. Make sure you know the acceptable values for the field(s) you plan to search. You will be able to access authority tables to see a table of acceptable entries for a field.

4. *Are filters case sensitive?*

No. You don't have to know the case of an entry to search for the entry.

5. *Can I do a Word Search within a Filter?*

Yes. If you have a filter set when you perform a word search, the filter will remain set when you use your search results.

6. *Can I sort a filter?*

Yes. You can use any of the predefined sorts with a filter or indicate a field or fields to sort by when you set the filter.

7. *Can I use filters on supplemental records?*

Yes. In fact, the filter is the only way to find information in most of the supplemental records since many of these are not available in Word Search.

8. *Can I combine filters?*

Yes. You can activate an Advanced Filter or Built In Filter and then use a Quick Filter in the List Pane to further refine your results.

B. Quick Filter

1. *What is a Quick Filter?*

A quick filter is a fast way of finding a group of records using the column headers in the List Pane for a specific term in a specific field. It works on your visible data and can be applied to an active advanced filter or tag set.

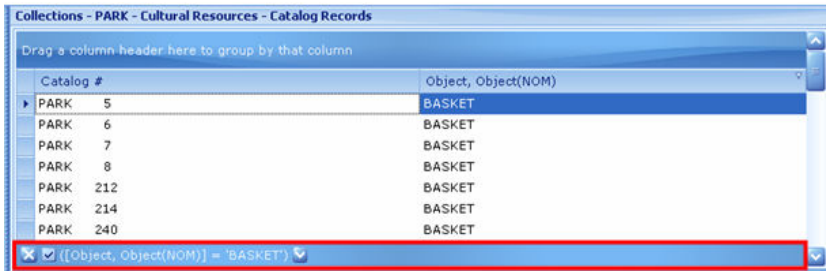
Note: Quick Filter is not available when the Large Data Navigator is active. When paging is activated, Quick Filter will only work on the current page of data. For more information on paging and the Large Data Navigator, refer to Section VII, System Options in Chapter 9.

2. *How do I use Quick Filter?*

Quick Filter depends on the fields showing in the List Pane. Each sort and My List View have different fields that appear in the List Pane. See Section V of this chapter for information on sorts and My List View. In addition, you can set up different fields to view for Advanced Filters and Tag Sets.

Note: You cannot set a quick filter on a field that is not visible in the List Pane.

- To set a Quick Filter:
- In the List Pane, hover over a column header and click on the drop down arrow that appears at the upper right corner of that column header.
- This lists all the unique terms found in that field in your visible data. Click and drag the lower left corner of the list to enlarge it. Select a term to filter.
- Your data will now be limited to the records with that term found in that field. The Quick Filter status bar will appear at the bottom of the List Pane indicating the quick filter you set. The number of records found in the quick filter will appear in the Status Bar at the very bottom of the screen.



Notice the Quick Filter status bar indicates the quick filter criteria that are currently set. You can cancel the quick filter by unchecking the box in front of the quick filter or clicking the X. The X will close the Quick Filter status bar whereas unchecking the quick filter box will not.

Note: You can view and reset previous quick filters from this status bar by clicking the down arrow and selecting a previous filter. The program remembers previous quick filters until you exit.

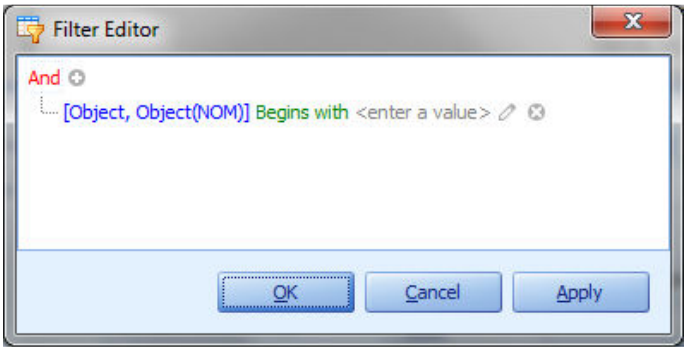
3. *How do I cancel a Quick Filter?*

To cancel a quick filter:

- Select (All) on the column header pull down menu that you used to set the quick filter, *or*
- Uncheck the Quick Filter box on the quick filter status bar at the bottom of the List Pane, *or*
- Click the X on the Quick Filter status bar at the bottom of the List Pane, *or*
- Right click on the column header you used to set the quick filter and choose Clear Filter.

4. *Can I create a Custom Quick Filter?*

Yes. There is a custom option on the Quick Filter pull down menu. This option allows you to set additional conditions for the quick filter such as changing the conjunction, comparing two fields, and using groupings. When you select (custom) from the pull down menu, the Filter Editor window opens.



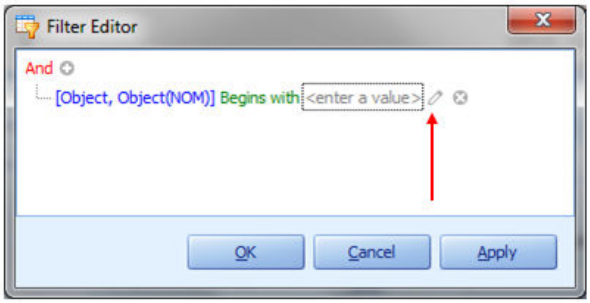
You can select more than one entry in the field on which to base the filter or select other fields in the List Pane by adding an And or Or condition to the filter. You can also compare data between two fields.

- In the Filter Editor window, select a specific condition such as "Begins with" or "Is greater than or equal to" by clicking the 'Begins with' condition for a list of other conditions. Your choices are dependent on the field type, and may include some or all of the following options:

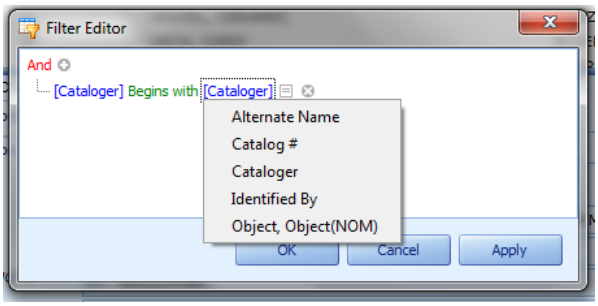
  equals
  does not equal
  is greater than
  is greater than or equal to
  is less than
  is less than or equal to
  is between
  is not between
  contains
  does not contain
  begins with
  ends with
  is like
  is not like
  is any of
  is none of
  is blank
  is not blank

- Then click on the <enter a value> next to the condition for a field to type your word or words you wish to filter.

- If you want to compare the selected field with another field in the List Pane using the condition, click the symbol after the <enter a value> field to select another field in the list pane to compare with the first field. Only certain conditions allow you to compare fields, such as Equals or Does not equal.

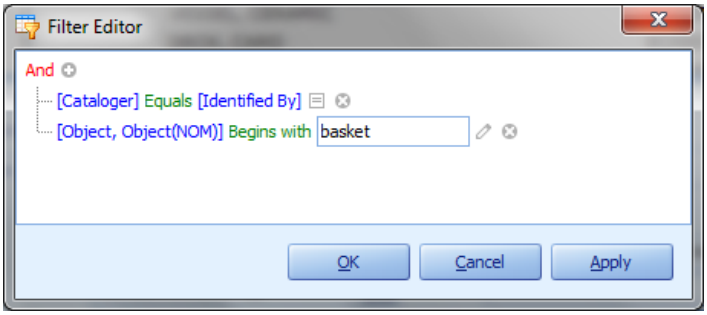


Note: You can change either field by clicking the field name in brackets for a list of available fields that appear in the list pane.



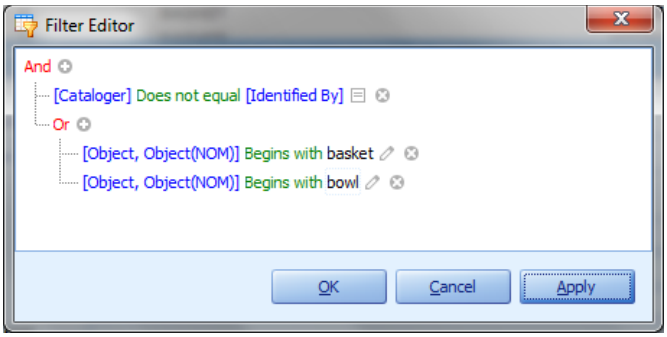
To cancel the compare fields option, click the symbol at the right of the second field name. It will return to the option <enter a value>.

- You can add additional filter lines by clicking the plus after the "And" conjunction or clicking "And" and select Add Condition. You can also change the conjunction by clicking And to choose another conjunction such as Or, Not And, Not Or.



- To remove a line, click the X at the end of that line.

- There are also functions to add other groupings with different conjunctions. Click the And conjunction and select Add Group. Then select the conjunction that appears below to change it to a different conjunction such as "Or".



- After setting all your options, click Apply to apply the filter so that you can see your results before closing the filter editor window or click OK to apply the filter and close the filter builder window.

Note: To edit the filter once it has been set, click the Edit Filter button that appears on the far right of Quick Filter status bar just below the list pane.

5. *What are the other options in the Quick Filter pull down menu?*

In addition to the unique terms listed in the pull down menu for the column header, there are several additional filtering options listed at the top of the pull down menu.

(All)

The All option will cancel the current quick filter and return all records back to the List Pane.

(Blanks)

Choose this option to find records where the selected field is empty.

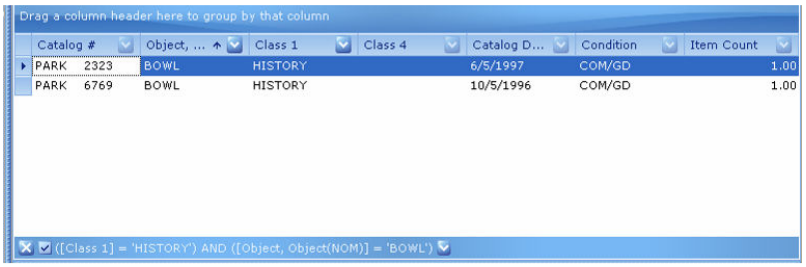
(Non Blanks)

Choose this option to find all records where the selected field is not empty.

6. *Can I filter on more than one field in the List Pane?*

Yes. You can make compound quick filters by selecting a term from the pull down menu in one column and then selecting another term from the pull down menu in another column. The Quick Filter status bar will show both fields and the values you selected.

For example, choose History from the pull down menu for Class 1 and then choose Bowl from the pull down menu for Object.



The list will show only the History records with an object name of bowl.

Note: You can use any of the quick filter functions in combination. For example, you could select History for Class 1 and then use a Custom Quick Filter on the Catalog Date field to set a range of dates for the fiscal year. The results would be all the History records cataloged during the fiscal year.

If you do not want to create compound filters, remember to cancel the current quick filter before setting another.

7. *Can I save a Quick Filter?*

No. Quick Filters cannot be saved. Use Advanced Filter if you want to save a filter criteria to use again and again. See the Section C below for information on Advanced Filters.

8. *Can I save the results from a Quick Filter?*

Yes. You can create a tag set of the quick filter results by selecting Add All Visible to Tag Set on the Record menu. You can then create a new tag set or add the records to an already existing tag set. See Tag Sets in Section III of this chapter.

9. *Where else can I use Quick Filter?*

You can use Quick Filter anywhere in the program where there is a grid with column headers and records listed below. For example, you can use Quick Filter in:

- the supplemental records grid for a specific supplemental type,
- the item lists in the associated modules that show catalog records attached to the associate module record,
- the sub-records tabs in the Archives module that show related sub-records.

10. *What other filter options are available in the List Pane?*

When you right click on a column header in the List Pane, there two additional options that will create a quick filter.

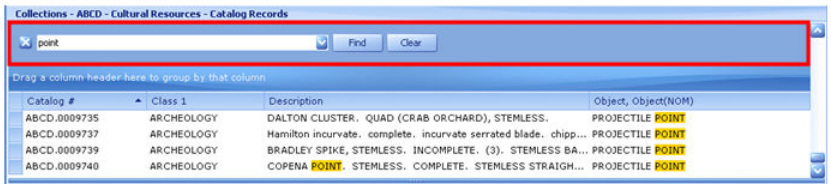
- Show Find Panel
- Show Auto Filter Row

Show Find Panel

The Show Find Panel 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.

Note: 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.

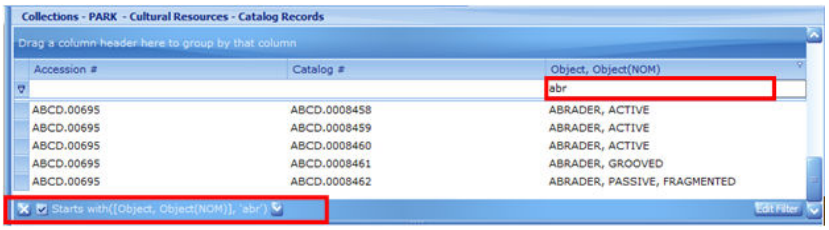
To turn off the Find Panel, click the X in front of the entry box, or right click a column header and choose Hide Find Panel.

Show Auto Filter Row

The Show Auto Filter Row adds an editable row just below the column headers in the List Pane. You can use this row to type a word or character string on which to filter. This will create a "Starts with" quick filter for that column.

Note: 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.)



You can also use a wild card (% - percent sign) at the beginning of your text to create a "Contains" quick filter for that column. Using the above example, you would enter '%abr' in the auto filter row to find all records where the object name contains the character string 'abr' anywhere in that field.

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

C. Advanced Filter

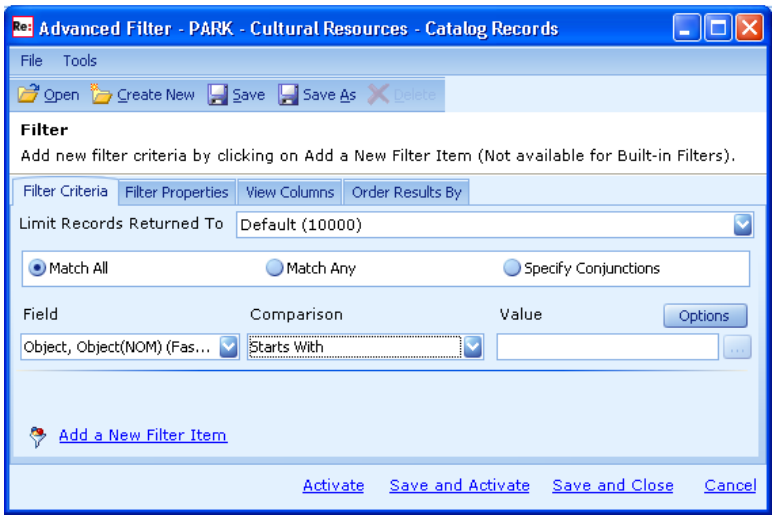
1. *What is the difference between Quick Filter and Advanced Filter?*

Advanced Filter allows you to search any field within the current table instead of limiting it to the fields in the List Pane. You can also filter on Supplemental records. You can save an Advanced Filter for later use, select fields to include in the list view, and select the fields to sort by when using the filter. Saved Filters can be shared with other users or kept private.

2. *How do I access Advanced Filter?*

To access the Advanced Filter function:

- click the Advanced Filter button on the button bar, *or*
- select Advanced Filter on the Record Menu. The Advanced Filter window will open.



3. *How do I create a filter?*

To create a filter:

- Fill in the filter criteria by selecting the field in the drop down list on which to base the filter. Fields in the currently viewed module and their supplementals (for catalog records) are available in Advanced Filter. **Note:** The supplemental fields are listed at the bottom of the list in uppercase.
- Enter the filter comparison for the field
- Then enter the field's value you want to find.

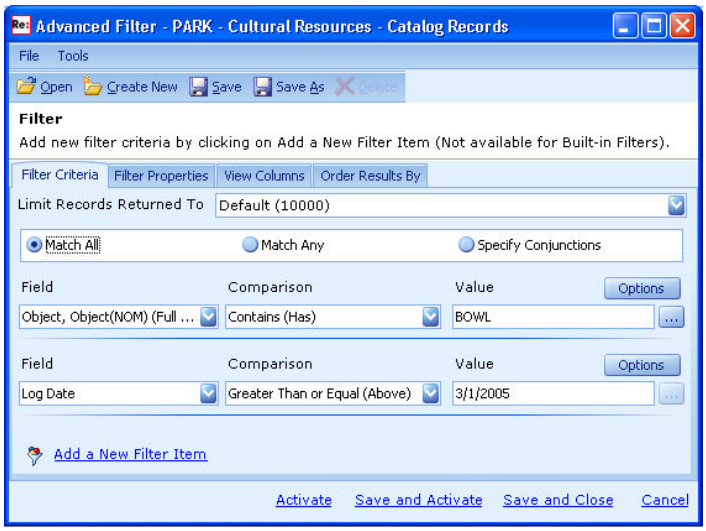
4. *What are the comparison options for a filter?*

The comparison options will vary based on the field selected. Options include:

- **Starts With:** Contents of field starts with value.
- **Doesn't Start With:** Contents of field doesn't start with value.
- **Matches:** Contents of field matches value exactly (for Full Text memo fields).
- **Doesn't Match:** Contents of field does not match value exactly (for Full Text memo fields).
- **Equal To (Same):** Contents of field matches value exactly (for limited length, numeric, and date fields).
- **Not Equal To (Different):** Contents of field does not match value exactly (for limited length, numeric, and date fields).
- **Less Than Or Equal (Below):** Contents of field is alpha-numerically less than or equal to value.
- **Greater Than Or Equal (Above):** Contents of field is alpha-numerically greater than or equal to value.
- **Contains (Has):** Contents of field includes value.
- **Doesn't Contain (Doesn't have):** Contents of field does not include value.
- **Between:** Contents of field falls alpha-numerically between 2 values. Use this option with 2 filter items looking at the same field. This is useful for setting a range.
- **Is Blank:** Field is empty.
- **Is Not Blank:** Field is not empty.
- **Is Null:** Date field is empty.
- **Is Not Null:** Date field is not empty.

5. *How do I filter on more than one field?*

Click Add a New Filter Item to include another field in the filter. You can add several filter items to search multiple fields.

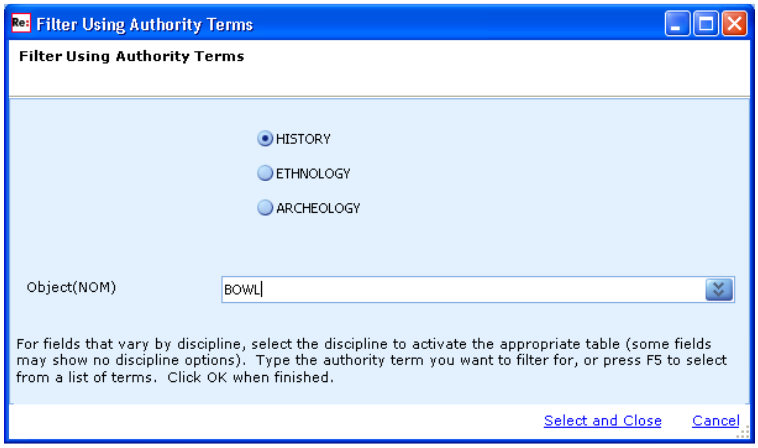


6. *Can I access the authority tables for a field in Advanced Filter?*

Yes. For fields that are associated with an authority table, you can access the values in the authority table from the Advanced Filter window by clicking the button at the end of the Value field. This button is only active if the field you have selected is associated with an authority table.

Note: For authority fields that have both a Fast Compare and Full Text option, the authority table button is only available if you choose the Full Text option for that field.

- When you click the authority table button, the following window will appear.



- For fields that vary depending on the discipline or category, you must first select the discipline or category to use the appropriate authority table for the field. If the field is not dependent on the discipline or category, these options will not appear.

- Click the down arrow(s), press F5 or right click in the field and choose Browse Authority Table to view and select terms from the authority table. You can also begin typing in the field and the term will autofill.

- After selecting the term from the authority table, click Select and Close to paste the entry into the value field on the Advanced Filter window.

7. *What are the other options on the Filter Criteria page?*

The additional Advanced Filter options are:

- **Limit Records Returned To:** Returns only a specified number of records. This usually remains at the default setting. It is most useful when using Large Data Sets and Paging. Refer to Chapter 9, Section VII, System Options, for information on using Large Data Sets and Paging.

- **Match All:** With this option selected, the filter only returns records that match all fields as defined in the filter. It assumes an AND between each item.

- **Match Any:** With this option selected, the filter returns records that match at least one field as defined in the filter. It assumes an OR between each item.

- **Specify Conjunctions:** With this option selected, you can specify AND or OR between each filter item. This is useful when you have three or more fields in your filter criteria and you want to specify different conjunctions between them.

- **Options Button:** Brings up options for each filter item.
    - Move Up**:** Move Filter item up in list.
    - Move Down**:** Move Filter item down in list.
    - Delete**:** Delete Filter item.
    - Prompt Me for this Value**:** Rather than specifying a value, this option prompts the user for the value for this field when the Advanced Filter is activated. Each time you activate the filter you can supply a different value without having to modify your filter. To remove the prompt from the value field, de-select this option

Note: The Prompt Me for this Value option is especially useful for filtering on the catalog # field. When the system prompts you for the value, you do not have to format the number exactly. If you type the catalog # in the Value field on the Advanced Filter window, you must enter it exactly as it appears in the data field including the correct number of spaces between the acronym and number. However, if you allow the filter to prompt you for the value, you can enter the acronym, a single space and then the number and it will find the correct record.

In the list of fields, there are some fields listed twice with the following terms after them:

- **Full Text:** Choose the field with Full Text and the filter will search the entire contents of a memo field. Some comparison options are not available on Full Text fields.

- **Fast Compare:** These are shorter versions of a memo field that contain only the first part of the data for faster comparison queries.

8. *How do I create a filter to search for a specific supplemental?*

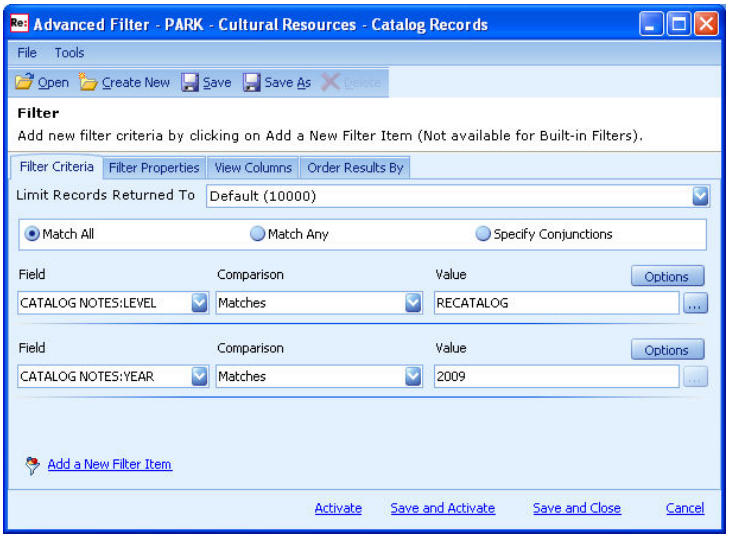
If you need to filter for a supplemental using several fields of that supplemental in your criteria, the supplemental field filter items in the Advanced Filter window must be adjacent to each other. The program will then find only the records where the two field values are located in the same supplemental.

For example, to find all the catalog records that were recataloged in a specific year, you need to filter on the Catalog Notes supplemental that has 'recatalog' as the level and contains the current fiscal year.

- In the Advanced Filter window, select the first supplemental field. For this example, choose CATALOG NOTES: LEVEL. Choose "Matches" for the condition and enter 'recatalog' for the value.

- Click Add a New Filter Item for a new row.

- Select the next supplemental field. For this example, choose CATALOG NOTES: YEAR. Choose "Matches" for the condition and enter the four digit year for the value.



- Click Activate to set the filter.

You can add other filter items to the filter but the supplemental field rows must be together for the program to find that exact supplemental.

9. *How do I activate the filter?*

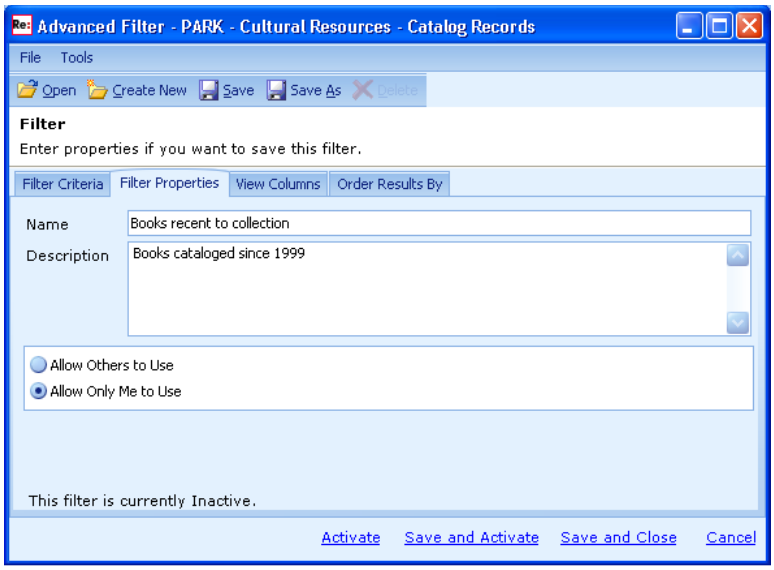
Once you have set your filter criteria, click Activate to simply activate the filter without saving it. The List Pane will refresh and your visible data will contain only records that match the filter. The filter information will appear on the Status Bar along with the number of records that match the filter.

10. *How do I save an Advanced Filter?*

To save an Advanced Filter for later use:

- Select the Fields, Comparisons, and Values for the filter on the Filter Criteria tab.

- On the Field Properties Tab, fill in a name and description for the filter and indicate whether or not you want to share this filter with other users.



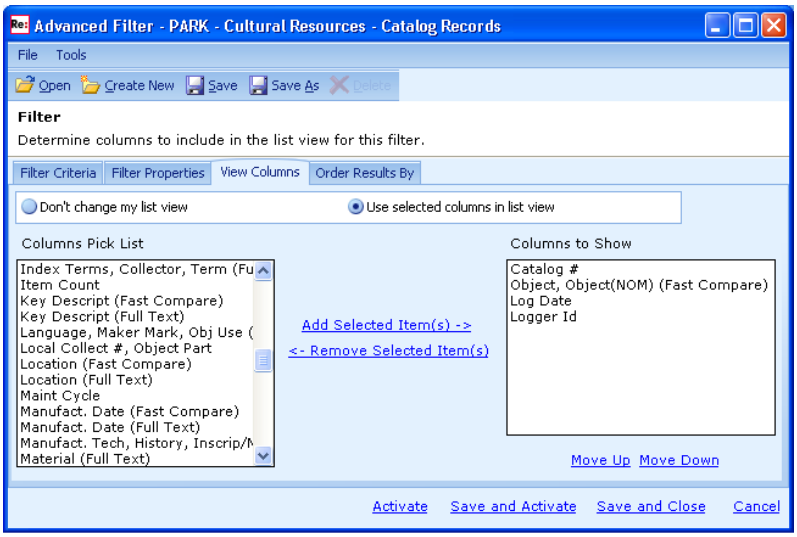
- To save the filter, click Save and Activate or Save and Close.

  Save and Activate saves changes to the Advanced Filter and activates it.

  Save and Close saves changes to the Advanced Filter but does not activate it, leaving your current visible data active.

11. *How do I set fields to view in the List Pane for the filter?*

On the View Columns tab, you can indicate whether to use the List View already in use or to choose specific fields for the List View and order of appearance when this filter is activated.



- Select "Don't change my list view" to keep the fields already in the List Pane.

- Select "Use selected columns in list view" to choose specific fields for this filter. Each time you use this saved filter, the List Pane will contain the fields you specify with this option.

- To add fields, choose a field in the Columns Pick List and click Add Selected Item(s).

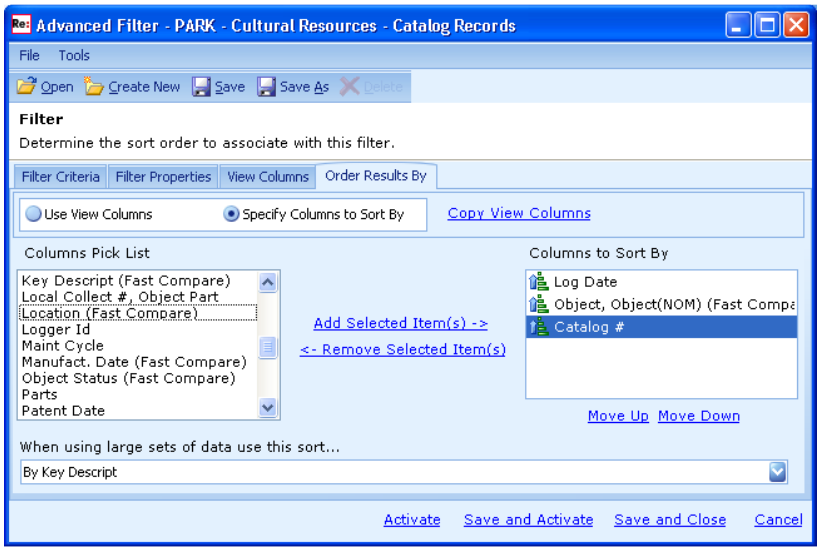
- To remove fields, highlight the field in the Columns to Show and click Remove Selected Item(s).

Note: You can highlight more than one field by using Shift-click and Ctrl-click.

- To change the order of the fields in the Columns to Show, highlight a field and click Move Up or Move Down.

12. *How do I specify a sort order for the filter?*

On the Order Results By tab, you can indicate whether to use the Sort order already in use or to specify fields to sort the records when this filter is activated.



- Select "Use View Columns" to sort by the fields you chose on the View Columns tab.

- Select "Specify Columns to Sort By" to select other fields to sort by.

- You can select fields in the Columns Pick List and click Add Selected Item(s) to add it to the Columns to Sort by.

- You can also use Copy View Columns to bring in the fields being used in the List View from the View Columns tab. This is a helpful shortcut to populate the Columns to Sort by. You can then rearrange and remove fields that you do not want to sort by.

- Double-click on a field on the Columns to Sort By box to toggle between ascending (1-9, A-Z) and descending (9-1, Z-A) order.
- Use Move Up and Move Down to change the order of each field in the sort when sorting on more than one field.

Note: If you leave the Columns to Sort By empty, the filter will use the Sort order already in use.

For more information on the option regarding large data sets, see Chapter 9, Section VII, System Options.

You can also change the sort once the filter is activated by using Quick Sort in the List Pane. See Section V of this chapter for information on using Quick Sort.

13. *Can I modify a filter once I have activated it?*

Yes. To modify an active filter, click on the Filter button on the button bar. The Advanced Filter window will open with your active filter information visible. Make any changes necessary and click Activate or Save and Activate.

14. *How can I access saved filters?*

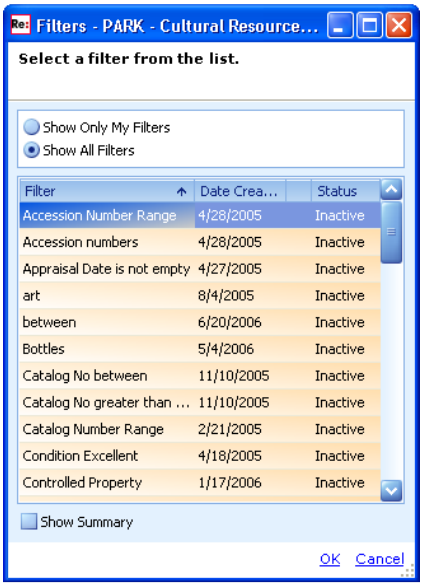
There are two ways to access saved filters:

- From the Advanced Filter window
- From the Navigation Pane

To access saved filters from the Advanced Filter window:

- Click the Advanced Filter button on the button bar or select Advanced Filter on the Record Menu.

- Then click Open on the toolbar or select Open from the File Menu. The list of saved filters will open.

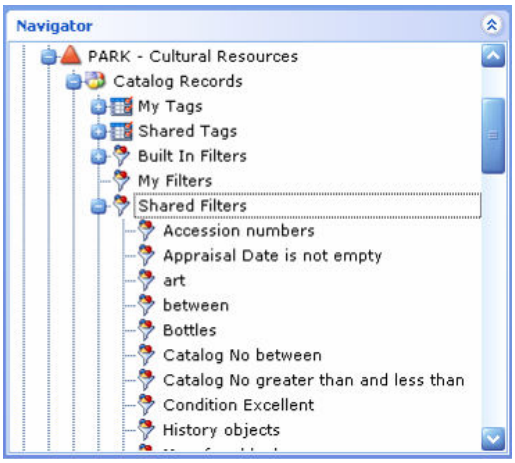


- Select one and click OK to open it and then you can activate it, with or without editing it first.

Note: You cannot change filter properties created by another user. You can, however, open one created by another user and save it with a different name using Save As on the toolbar. You can then modify the newly created filter.

To access saved filters from the Navigation Pane:

- Each table (catalog records, exhibit records, etc.) has nodes for saved Advanced Filters.



My Filters are those you saved with "Allow Only Me to Use" on the Filter Properties tab.

Shared Filters are those all users saved with "Allow Others to Use" on the Filter Properties tab. The Filter Criteria can only be edited by the user who created the filter but all users can activate shared filters.

Built In Filters are saved Advanced Filters that come preinstalled in the software. They cannot be edited or deleted. Refer to Section D below for more information on built in filters.

- To activate a filter, click the filter name in the Navigation Pane. The List Pane will refresh and your visible data will contain only records that match the filter.

Note: You can also add a new filter from the Navigation Pane. Right-click on My Filters or Shared Filters in the Navigation Pane and choose Create New Filter.

- To see other options for the filter, right-click the name in the Navigation Pane. You have the following options:

  Apply filter: Activates the selected filter. If a Tag Set is already active, the filter is applied to the Tag Set. Only records that match the filter and are in the Tag Set will be listed in the List Pane.

  Apply filter, clear tag set: Available if a Tag Set is already active. Deactivates the Tag Set and activates the selected filter.

  Apply filter, keep list view: Activates the selected filter and keeps the list view currently in use rather than applying the one specified in the filter. If a Tag Set is already active, the filter is applied to the Tag Set. Only records that match the filter and are in the Tag Set will be listed in the List Pane.

  Apply filter, clear tag set, keep list view: Available if a Tag Set is active. Deactivates the Tag Set and activates the selected filter and keeps the list view currently in use rather than applying the one specified in the filter.

  Modify filter: Brings up the saved filter to be edited.

Delete filter: Deletes the selected filter.

15. *How do I deactivate a filter?*

To deactivate a filter:

- Click on the deactivate filter button on the button bar, *or*
- Select Deactivate Filter on the Record Menu.

Your List Pane will refresh to show all records.

Note: The program remembers when you have a filter set. If you leave the module without deactivating the filter, the next time you return to that module, the filter will still be active until you exit the program.

16. *How do I delete a saved filter?*

To delete a saved filter:

- In the Navigation Pane, right click on the saved filter and choose Delete Filter, *or*
- In the Advanced Filter window, click Open to select the saved filter if not already selected, highlight the filter and click OK. Once the saved filter is selected, click Delete on the button bar or select Delete on the File menu.

17. *Can I save the filter results as a Tag Set?*

Yes. You can create a Tag Set of the filter results by selecting Add All Visible to Tag Set on the Record menu. You can then create a new Tag Set or add the records to an already existing Tag Set. See Tag Sets in Section III of this chapter.

D. Built In Filters

1. *What are Built In Filters?*

Built In Filters are saved Advanced Filters that come preinstalled in the software.

You cannot edit or delete Built In Filters. If you need to add additional criteria to the filter, set the Built In Filter and click on the Filter button on the button bar. You will see the criteria for the Built In filter in the Advanced Filter window. All fields will be inactive. Click Save As on the toolbar and give the filter a different name. When you click OK, you will be able to add more filter items or change other settings in the filter. The original Built In Filter will remain unchanged. Save and Activate the new filter.

2. *Where are Built In Filters available?*

There are Built In Filters in catalog records, archives records and several of the associated modules (Accessions, Exhibits, Loans Out and Loans In).

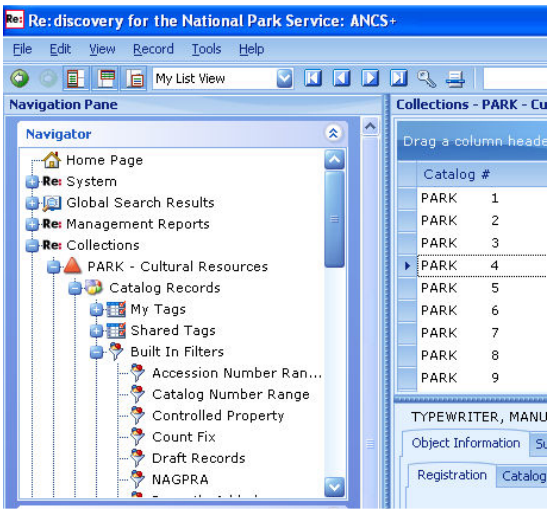
3. *How do I access the Built In Filters?*

The Built In Filters are accessed through the Navigation Pane. To access the Built In Filters:

- You must first load the records from the collections module or associated module you wish to filter (e.g., catalog records, accession records, etc.). Select one of the modules under a directory so that the records appear in the List Pane and Record Pane.

- In the Navigation Pane, expand the catalog records, archive level or associated module node under a directory by clicking the + in front of it.

- Within each collections module and associated module you will see the node for Built In Filters. Click the + to expand it and view the Built In filter options.



4. *How do I activate a Built In Filter?*

To activate a Built In Filter:

- Make sure the records are loaded in the List Pane and Record Pane.

- In the Navigation Pane, click on the Build In Filter option you want to activate.

- You may be prompted to enter a value to filter for or the filter will activate automatically and your List Pane will refresh to show the filter results.

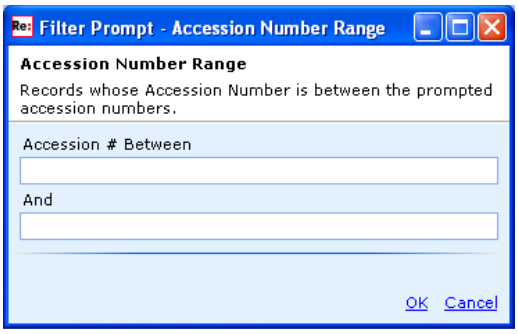
5. *What are the Built In Filters for Catalog Records?*

There are several Built In Filters for catalog records in the Collections module.

Accession Number Range

Prompts you to enter a beginning accession number and ending accession number to filter for.

For example, enter PARK-00020 in the first field and PARK-00021 in the second field. Then click OK. The results will be all records with an Accession number from PARK-00020 to (and including) PARK-00021. If you want to filter for one accession number, enter the same accession number in both fields.

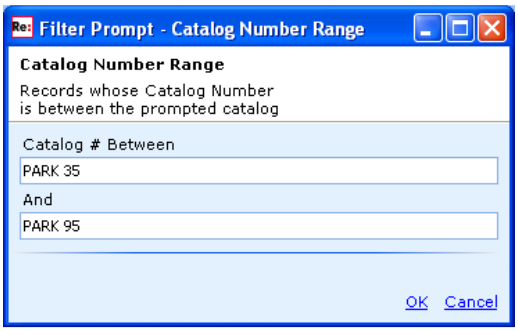


Catalog Number Range

Prompts you to enter a beginning catalog number and ending catalog number to filter for.

For example, enter PARK 35 in the first field and PARK 95 in the second field. Then click OK. The results will be all catalog records from PARK 35 to PARK 95.

Note: You do not have to format the catalog number with the correct number of spaces. It must include the acronym in uppercase, a space and then the number.



Controlled Property

Filters your visible data for any record where Ctrl Prop = 'Y'.

Count Fix

This filter finds all the records that have data entry errors with Item Count, Quantity and Storage Unit. It searches for three criteria:

- It looks for records where the Item Count and Quantity both have entries (Item Count >=1 and Quantity >= 0.1)
- It looks for records where the Item Count has an entry, but the Storage Unit does not have 'EA' in the field.
- It looks for records where the Quantity has an entry and the Storage Unit has 'EA'.

Draft Records

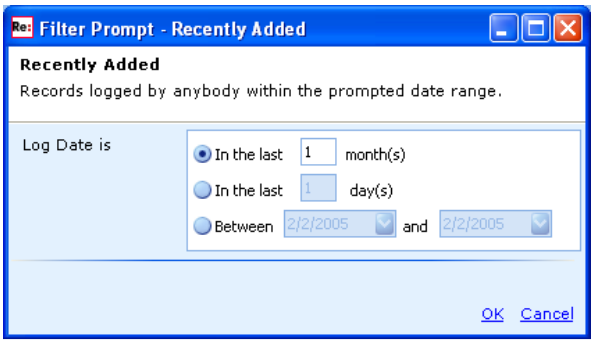
Filters your visible data for any record where the Object Status = 'DRAFT RECORD.'

NAGPRA

Filters your visible data for any record where the NAGPRA field is not empty.

Recently Added

Filters for records where the Log Date is between a selected date range. You are prompted to select how recent.



- Select the first option and indicate the number of months for records entered prior to today's date.
- Select the second option and indicate the number of days for records entered prior to today's date.
- Select the third option to specify a date range. For example, you could enter a fiscal year date range: 10/1/2008 and 9/30/2009. You can use the down arrow to access a calendar and select a date.

Recently Changed

Filters for records where the Change Date is between a selected date range. You are prompted to select how recent. The options are the same as for Recently Added above.

Recently Changed by Me

Filters for records where the Change Date is between a selected date range AND the Change By is your current user login. You are prompted to select how recent but the Change By entry is automatically completed from your user ID when you logged into the system. The options for the date range are the same as for Recently Added above.

6. *What is the Built In Filter for Accessions?*

There is only one Built In Filter for Accessions:

Not Fully Cataloged: Filters for records where the Catalog Status field does not equal 'Fully Cataloged.'

7. *What is the Built In Filter for Exhibits?*

There is only one Built In Filter for Exhibits:

Current Exhibits: Filters for records where the End Date for the exhibit is above today's date or is blank.

8. *What are the Built In Filters for Loans Out and Loans In?*

There are two Built In Filters for both Loans Out and Loans In associated modules:

Current Loans

Filters for records where the End Date for the loan is above today's date or is blank.

Loans Ending within a Month

Filters for records where the End Date for the loan is between today's date and the same day next month – e.g., between 7/10/2009 and 8/10/2009.

9. *What are the Built In Filters available in the Archives records?*

Each level of an archives directory (Collection, Series, File Unit, Item) has the same list of Built In Filters.

Accession Number Range
Catalog Number Range
Recently Added
Recently Changed
Recently Changed by me

These work the same as the Built In filters for catalog records. See D.5 above for further details on these filters.

10. *What are the Built In Filters available in the Automated Checklist Program?*

There is one Built In Filter for the ACP Checklist under Management Reports:

DOI Questions: Filters for the checklist questions under each facility that are required by the Department of the Interior.

See Appendix J, Automated Checklist Program for further information.

III. Tag Sets

A. Overview

1. *How does the Tag Set function work?*

A tag set contains markers pointing to a subset of data within your main table. Tag sets allow you to view and work with only the records of interest to you. The records in a tag set are not copies of the "real" records. They are the actual records, grouped for the convenience of the user. Any change you make to a record in a tag set is a change to the actual record.

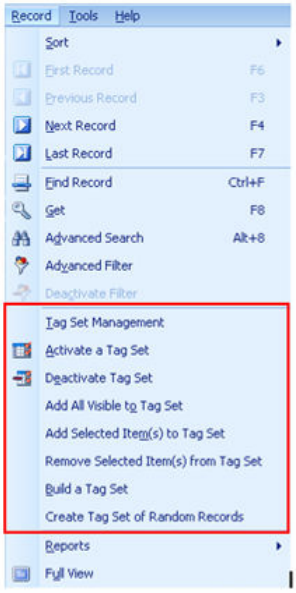
2. *When do I use the Tag Set function?*

Use the Tag Set function when you want to work with only a portion of your data. You can create tag sets to save the results of a word search, quick filter or advanced filter, or create one manually. Once created, you can quickly activate a tag set to continue work on a specific section of your data.

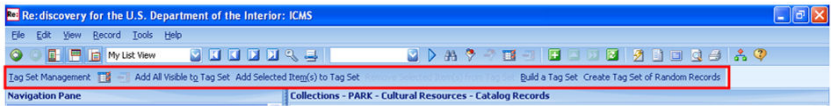
Tag sets can be temporary or permanent. Word Search creates temporary tag sets. The Tag Set function allows you to create permanent tag sets.

3. *How do I access the Tag Set functions?*

All Tag Set functions are located on the Record menu.



There is also a Tag Set Management toolbar available for quick access to Tag Set functions. To activate the Tag Set Management toolbar, select Tag Set Management under Toolbars on the View menu. The Tag Set Management toolbar will appear below the button bar at the top of the screen.

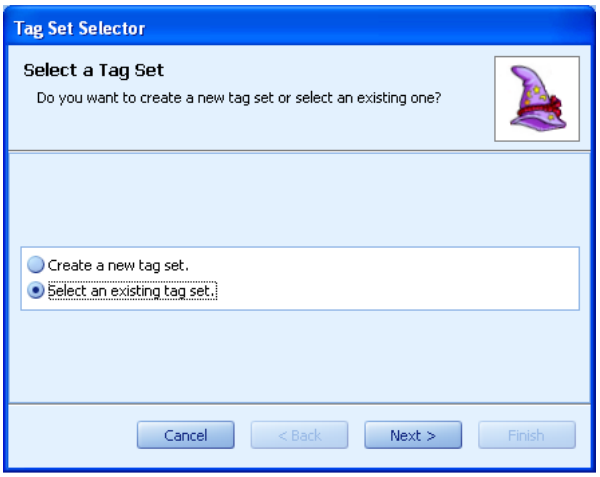


B. Creating a Tag Set

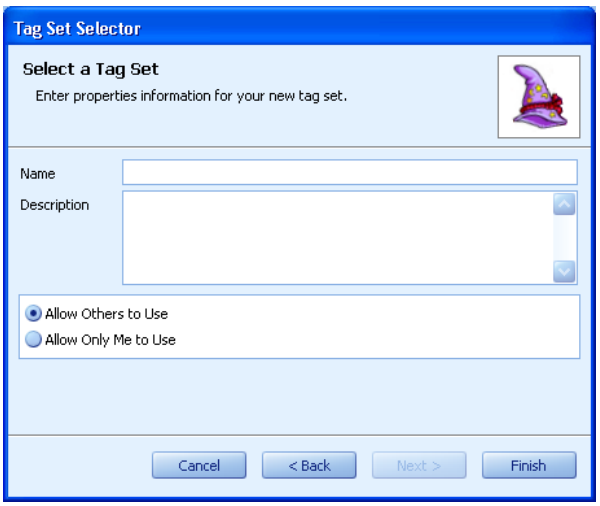
1. *How do I create a tag set of the visible data?*

Use Word Search, Quick Filter or Advanced Filter to define a subset of data as your visible data. To create and save a tag set of currently visible data:

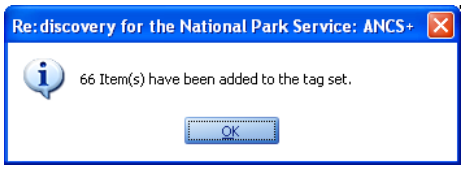
- From the Tag Set Management toolbar or the Record menu, choose Add All Visible to Tag Set. The Tag Set Wizard comes up.



- Select Create a new tag set. Then click Next.



- Enter a name for the Tag Set.
- Enter a description (optional).
- Select whether to allow others or only you to use the tag set.
- Click Finish. You will get a confirmation message of how many records were added to your tag set.



- Click OK

Tag sets are static. If you add new records to the database that you want to include in an existing tag set, you must add them to the tag set. The tag set doesn't search for and add records automatically.

Note: Creating a tag set does not automatically activate it as your visible data. You must click the Activate a Tag Set button on the button bar or Tag Set Management toolbar, or choose Activate a Tag Set on the Record menu. You can also activate a tag set by clicking on the Tag Set name in the Navigation Pane. These are listed in the My Tags or Shared Tags options under each module. (See Section C below for information on activating a tag set.) You can deactivate the tag set and reset it at any time. Use the Deactivate Tag Set button on the button bar or Tag Set Management toolbar, or choose Deactivate Tag Set on the Record menu.

2. *How do I create a tag set by manually selecting records in the List Pane?*

To create a tag set by manually selecting records:

- In the List Pane, highlight a record you wish to include in a tag set.

If you want to select…	***then…***
consecutive records in the List Pane,	hold down the shift key and click on the last record you want to include in a tag set. All records in between will be highlighted in addition to the first and last record.
records that are not consecutive in the List Pane,	hold down the Ctrl key and click on individual records in the List Pane. You can scroll the list and continue selecting individual records by holding down the Ctrl key before you click on a record.

- After highlighting the record(s) you want in the List Pane, click Add Selected Item(s) to Tag Set on the Tag Set Management toolbar or from the Record menu. The same Tag Set wizard appears as in B.1 above.

- Select Create a new tag set. Then click Next.

- Enter a name, description (optional), and select whether to allow others or only you to use the tag set. Then click Finish.

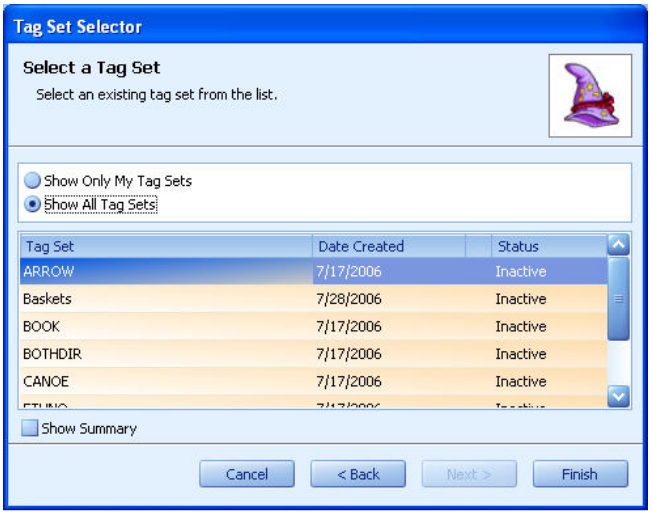
- You will get a confirmation message of how many records were added to the tag set. Click OK.

Note: If you want to continue browsing through your records and adding several at a time to the same tag set, use the Build a Tag Set option described in B.5 below.

3. *How do I add a single item to an existing tag set?*

To add one record to an existing tag set:

- Highlight the single record in the List Pane that you wish to add.
- On the Tag Set Management toolbar or from the Record menu, click Add Selected Item(s) to Tag Set.
- In the Tag Set wizard, choose "Select an existing tag set." Then click Next.



- Select whether to show only tag sets you have created, or tag sets shared by others.

Note: If you do not see any tag sets in the list, select Show All Tag Sets. The Show Summary option at the bottom will show the tag set descriptions (if entered).

- Highlight the tag set in the list and click Finish.
- You will get a confirmation message that 1 record was added to the tag set. Click OK.

4. *How do I add a group of records to an existing tag set?*

To add a group of records to an existing tag set:

- Establish your visible data with Word Search, a Quick Filter, or Advanced Filter, or by activating another tag set (see C below for activating a tag set). Or select multiple records in the List Pane by using Shift-click or Ctrl-click.

If you have…	***Then…***
Word Search results, a filter or tag set activated,	click Add All Visible to Tag Set on the Tag Set Management toolbar or Record menu.
selected multiple records in the List Pane,	click Add Selected Item(s) to Tag Set on the Tag Set Management toolbar or Record menu.

Note: Be careful when selecting Add All Visible to Tag Set. If you have only highlighted records in the List Pane, you must use Add Selected Item(s) to Tag Set. If you click Add All Visible to Tag Set instead, you will add all records contained in your current list to your tag set, not just the highlighted records.

- In the Tag Set wizard, choose "Select an existing tag set" and click Next.
- Highlight the tag set in the list and click Finish.
- You will get a confirmation message of how many records were added to the tag set. Click OK.

5. *What is the Build a Tag Set option?*

If you are browsing through your records, performing various word searches or activating various filters and want to periodically add the resulting records to the same tag set, use the Build a Tag Set option. This allows you to add various subsets or selected records to the same tag set with the single click of a button.

To use the Build a Tag Set option:

- On the Tag Set Management toolbar or from the Record menu, click Build a Tag Set. The button and menu option will stay activated until you click it again.
- The Tag Set wizard will open. Select whether to create a new tag set or select an existing tag set. Then click Next.
- If you are creating a new tag set, enter a tag set name, description and select who to allow to use the tag set. If selecting an existing tag set, highlight the tag set in the list that appears. Click Finish.

You are now ready to add records to the tag set you created or selected. The status bar at the bottom of the screen indicates that you are building a tag set with the name of the tag set listed. (E.g. Building: Exhibit A.)

- Perform various word searches, activate filters or quick filters to establish subsets of your data. Each time you establish a subset that you want to add to the tag set, click Add All Visible to Tag Set on the Tag Set Management toolbar or from the Record menu. The records will be automatically added to the selected tag set. (The tag set wizard will not appear.) A confirmation message indicates how many were added to the tag set each time.
- To add records that you have highlighted in the List Pane using Ctrl-click or Shift-click, select Add Selected Item(s) to Tag Set on the Tag Set Management toolbar or from the Record menu. You can highlight several in a row, or select just single records to add one at a time. Each time you click Add Selected Item(s) to Tag Set, the highlighted record(s) in the List Pane will be added to the same tag set. You will get a confirmation message indicating how many were added each time.
- When you have finished adding records to the tag set you are building, click Build a Tag Set on the Tag Set Management toolbar or from the Record menu to stop building the tag set.

C. Activating a Tag Set

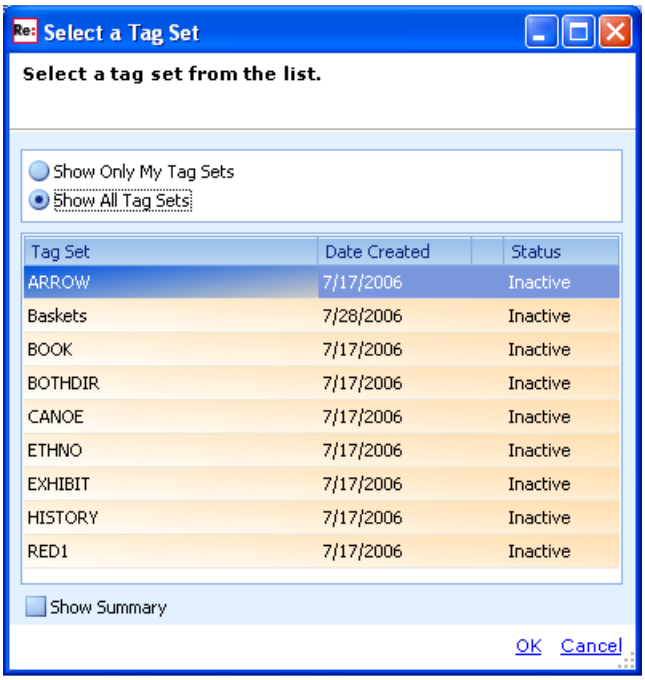
1. *How do I activate a tag set?*

Tag Sets can be located and activated from a couple of places in the program.

- From the Button Bar/Menu Bar
- From the Navigation Pane

Button Bar or Menu Bar

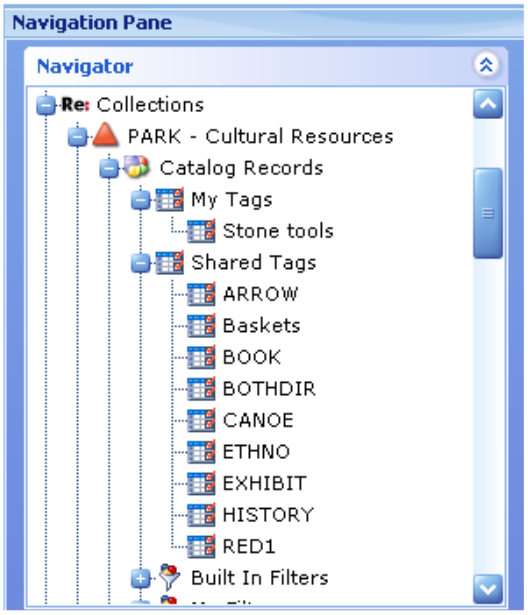
- Click the Activate a Tag Set button on the button bar or Tag Set Management toolbar, or select Activate a Tag Set on the Record menu.



- Select whether to show only your tag sets or all tag sets.
- Highlight the tag set in the List and click OK.
- The List Pane now displays the records in your Tag Set. The Status Bar indicates that there is a Tag Set active and shows the number of records. The contents of the Tag Set are now your visible data.

Navigation Pane

Each table (catalog records, exhibit records, etc.) has nodes to see Tag Sets.



- In the Navigation Pane, expand the catalog records or associated module node by clicking the + in front of it.

- You will see nodes for My Tags and Shared Tags.

  My Tags are those you created with "Allow Only Me to Use" in the Properties.

  Shared Tags are those all users created with "Allow Others to Use" in the Properties. The properties can only be edited by the user who created the Tag Set.

- To activate a Tag Set, click the name in the Navigation Pane.

- To see other options, right-click the name in the Navigation Pane.

  Activate tag set: Activates the selected tag set. If a Filter is already active, the filter is applied to the tag set. Only records that match the filter <u>and</u> are in the tag set will be listed in the List Pane.

  Activate tag set, clear filter: Available if an Advanced Filter is already active. Deactivates the Advanced Filter and activates the selected tag set.

  Modify tag set: Brings up the Tag Set Management window so you can edit the properties. (See Section D below.)

  Delete tag set: Deletes the selected tag set. Deleting a tag set does not delete the records from your database.

When you leave a module where a tag set is active and go to another module or directory, the tag set will still be active when you return to that module. For example, you can activate a tag set in catalog records, go to Loans Out to view those records, return to the catalog records and the tag set will still be active. The tag set will remain active until you deactivate it, select another tag set, or exit the program.

2. *How do I deactivate a tag set?*

To deactivate a tag set:

- Click on the Deactivate Tag Set button on the Button bar or Tag Set Management toolbar, *or*
- Select Deactivate Tag Set on the Record menu.

Note: The tag set is still available to be reset at any time.

D. Modifying a Tag Set

1. *How do I remove records from a tag set?*

To remove records from a tag set, you must first activate the tag set (see C.1 above). Then:

- Highlight a single record in the List Pane or multiple records (selected using Shift-click or Ctrl-click) that you want to remove from the tag set.
- On the Tag Set Management toolbar or from the Record menu, select Remove Selected Record(s) from Tag Set.

The record(s) will no longer appear in the visible data, but will still exist in the database.

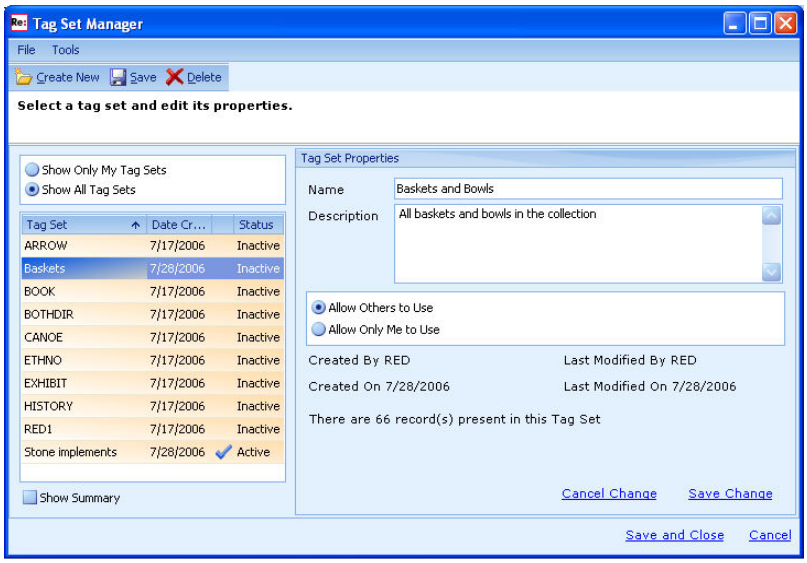
2. *Can I change the fields in the List Pane for the tag set?*

Yes. The fields in the List Pane can be changed by selecting a different sort on the Button bar, or changing the My List View sort option using Update My List View on the View menu or right-click menu in the List Pane. See Section V in this chapter for more information on Sorts and My List View.

3. *How do I change the properties of a tag set?*

To change the properties of a tag set such as the name of the tag set, description, or who can use the tag set:

- Click Tag Set Management on the Tag Set Management toolbar or from the Record menu. The Tag Set Manager window will open.



- Select whether to view only your private tags sets or all tag sets.
- Select a tag set in the list and modify any information as desired.

Note: Tag Set properties can only be edited by the user who created the Tag Set but other users can activate the Tag Set.

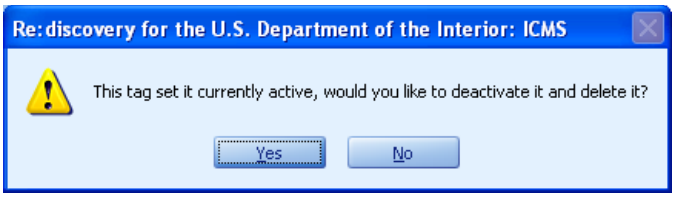
- After making the modifications, click Save Change or Save and Close.

4. *How do I delete a tag set?*

To delete a tag set:

- Click on Tag Set Management on the Tag Set Management toolbar or from the Record menu.
- In the Tag Set Manager window, select to show only yours or all tag sets, then highlight the tag set you want to delete.
- Click Delete on the toolbar.
- The system will ask if you are sure you want to delete the tag set. Click Yes to delete it. Or,
- In the Navigation Pane, expand the module under the directory node where the tag set is located.
- Locate the tag set under My Tags or Shared Tags.
- Right click on the tag set you wish to delete and select Delete Tag Set.
- The system will ask if you are sure you want to delete the tag set. Click Yes to delete it.

Note: If the tag set is active when you delete it, you will see a message asking if you want to deactivate the tag set and then delete it.



Click Yes to deactivate it and delete the tag set. Click No, to cancel the deletion.

Once you delete a tag set, it is gone forever. You cannot bring back deleted tag sets. To view the same subset, you will have to recreate it using filters, Word Search or selecting records in the List Pane as you did originally.

Deleting a tag set does not delete the records from your database.

E. Using Tag Sets

1. *How do I organize the records in a tag set?*

There are several ways to change the order of records in a tag set:

- Select a predefined sort on the Button bar or from the Record → Sort menu.
- In the List Pane, apply a Quick Sort by clicking on a column header to sort the list by that field. If you click the same column header again, the sort order will be reversed.
- To sort and group records by a field in the List Pane, click and drag a column header to the area just above the column headers where it says "Drag a column header here to group by that column". The List Pane will show the unique values for that column with the records that match under each value (click the + to expand and view the records under each value). **Note:** To ungroup the list, click and drag the column header back down to the column header row.

For more information on Sorts see Section V of this chapter. For more information on grouping records in the List Pane, see Section VIII of this chapter.

2. *Can I apply a filter to a tag set?*

Yes. You can apply both Quick Filters and Advanced Filters to tag sets. Refer to Section II of this chapter for information on setting filters.

3. *Can I compare the contents of two tag sets?*

Yes. If you have two tag sets that contain some of the same records, you can compare the contents of two tag sets using Advanced Search.

- Start Advanced Search by clicking the button on the button bar, selecting Advanced Search from the Record Menu, or pressing Alt-8.
- To find the records that are in one tag set but not the other, type the following in the Search box:

  @"Furniture in Collection" NOT @"Chairs in Collection"

- Click Begin Search.

(**Note:** "Furniture in Collection" and "Chairs in Collection" are examples of tag set names. Enter the tag set names that you created. You must use quotes if the tag set names contain spaces.)

The search results will be all records that are in the first tag set but not in the second tag set.

- To find the records that are contained in both tag sets, type the following in the Search box:

  @"Furniture in Collection" AND @"Chairs in Collection"

- Click Begin Search.

  The search results will be all records that are in the first tag set and in the second tag set.

4. *What is the Create Tag Set of Random Records option?*

Create Tag Set of Random Records allows you to produce a random sample of your records from any Cultural Resources or Natural History directory. See Section IV of this chapter for information on creating a random set of records.

IV. RANDOM RECORDS

A. Overview

1. *What is the Random Records function?*

The Random Records function allows you to produce a random sample of your catalog records from any Cultural Resources or Natural History directory.

2. *When will I use the Random Records function?*

You may want to use the Random Records function to check records:

- from a new cataloger's work
- submitted at the end of a cataloging contract
- for general quality control

3. *How is the number of records in the Random Records determined?*

You can choose how large to make your random records set. You can define your set's size by specifying the:

- number of records in the random tag set, *or*
- percentage of the visible data in the random tag set.

B. Generating Random Records

1. *Where is the Random Records function located?*

"Create a Tag Set of Random Records" is located on the Record menu on the Menu Bar, or from the Tag Set Management toolbar.

Note: To activate the Tag Set Management toolbar, go to the View menu, select Toolbars and choose Tag Set Management.

2. *How do I generate a tag set of random records?*

- Select "Create a Tag Set of Random Records" on the Record menu. The Create a Random Set of Records window appears.

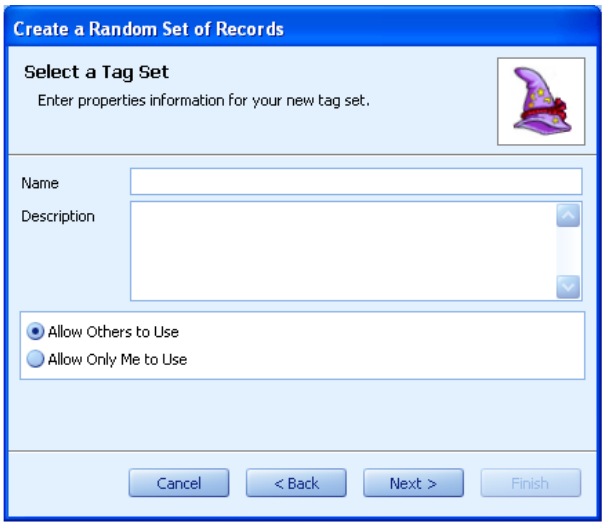
- Select a tag set option:

  Create a new tag set will put the randomly selected records into a new tag set.

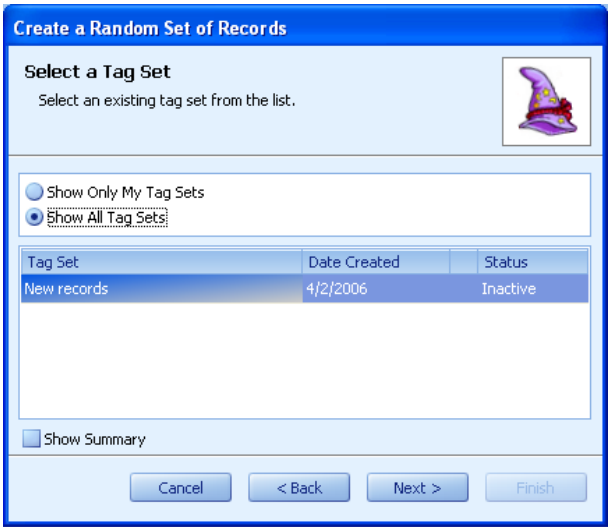
Select an existing tag set will add the randomly selected records to an already existing tag set.

- Click Next.

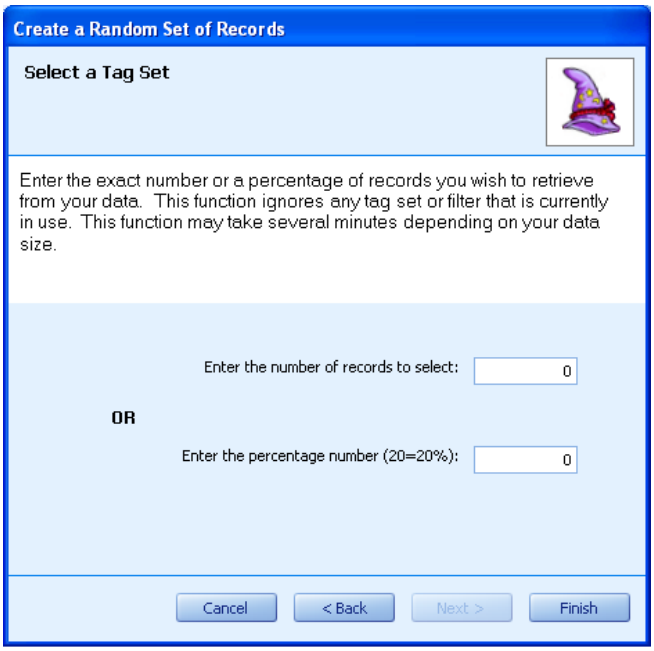
- If you are creating a new tag set, the next window will allow you to name the tag set and choose who can view the tag set.



- If you are selecting an existing tag set, the next window will allow you to select a tag set from the list of your tag sets or all tag sets.



- After creating or selecting a tag set, click Next.



If you want your random set…	*Then…*
To contain a specific number of records,	enter the number of records to select at the "Enter the number of records to select" prompt.
to contain a percentage of the records in your entire data,	enter a percentage number of records to select at the "Enter the percentage number" prompt.

- Click Finish. The number of randomly selected records will be added to the new or existing tag set.

3. *How do I access the tag set of random records that I generated?*

To activate your tag set of random records, you can click the Activate a Tag Set button on the button bar or Tag Set Management toolbar, select the tag set, and click OK or you can click on the tag set name under either My Tags or Shared Tags in the Navigation Pane.

V. SORT

A. Overview

1. *What is Sort?*

The Sort function allows you to select the key value by which the records in the file are sorted or ordered. By changing the sort order, you can change the order in which the system displays the records in your visible data.

The sort order defines which fields will display in the List Pane, and which field(s) you will be prompted for with the Get function.

The sort order is always displayed on the button bar.

To change your sort order, choose from the list of sort orders. The list of available sort orders changes in the different modules and associated modules. There are also additional sort capabilities in the List Pane, for My List View and for Advanced Filters. For more information on sorts within Advanced Filters, refer to Section II of this chapter.

2. *Why would I want to sort my records?*

You sort your records for a variety of reasons. For example, you might want to sort by discipline to view all the records for each discipline together. A sort by location would allow you to list and view records by location.

The Get function is based on the sort order. For example, to use the Get function to get a record by object name, you must first sort the records by object name. See Section VI in this chapter for more information on using Get.

3. *Must I choose a sort order?*

No. If you don't choose a sort order the program uses the default sort order.

The default sort order for your catalog records is by catalog number.

The default sort order varies for associated modules and archives directories.

Associated Module or Archives level	***Default Sort Order***
Accessions	Accession number
Conservation	Catalog number
Exhibits	Exhibit ID
Loans Out	Loan ID
Loans In	Accession number
Preparation/Treatment	Catalog number
Maintenance	Catalog number
Deaccessions	Deaccession number
Restrictions	Restriction number
Locality	Site Name
Artist/Maker/Eminent Figure	Name
Names and Addresses	Name ID
NAGPRA	Context ID
Archives – Collections	Collection number
Archives – Series	Collection + Series number
Archives – File Unit	Collection + Series + File Unit number
Archives – Item	Collection + Series + File Unit + Item nbr

B. Sorting Records

1. *How do I select a sort order?*

To select a sort order:

- use the drop down menu on the button bar, or
- select a sort under Sort on the Record menu.

The new sort order will appear in the button bar and the List Pane will refresh to reflect the fields defined by the sort.

Note: The program remembers the sort last selected by each user login so that the next time you access the catalog records or associated module, that sort will be the active sort.

2. *Can I change the sort order within a filter?*

Yes. You can change the sort order within a filter. For additional information about filters, refer to Section II of this chapter.

3. *Can I change the sort order within a tag set?*

Yes. You can change the sort order within a tag set. For additional information about tag sets, refer to Section III of this chapter.

C. Sort Orders and Preselected Sort Fields

1. *What are the sort orders and preselected sort fields for each module?*

The preselected sorts and the fields you will see in the List Pane are as follows. Default sorts are marked by an asterisk (*).

Note: There is a sort order of My List View for all modules. Refer to Section D below for information on My List View.

Refer to Appendix F: Archives Module, Appendix H: Collections Management Report, Appendix I: Automated Inventory Program, and Appendix J: Automated Checklist Program for the sorts associated with these modules.

Cultural Resources Records

Sort Order	***Preselected Sort Fields***
*By Catalog Number	catalog number/object name
By Location	location/catalog number/object name
By Manufact. Date	manufacture date/catalog number/object name
By Accession Number	accession number/catalog number/object name
By Class 1	classification line 1/catalog number/object name
By Within Site	within site provenience/catalog number/object name
By Object Name	object name/catalog number
By Record ID	catalog number/object name/description
By Object Status	object status/catalog number/object name

	By Artist/Maker	artist or maker/catalog number/object name
	By Eminent Figure	eminent figure/catalog number/object name
	By Eminent Org	eminent organization/catalog number/object name
	By Key Descriptor	key descriptor/catalog number/object name
	By State Site #	state site #/catalog number/object name
Natural History Records	***Sort Order***	***Preselected Sort Fields***
	*By Catalog Number	catalog number/scientific name
	By Location	location/catalog number/scientific name
	By Accession Number	accession number/catalog number/scientific name
	By Sci. Name, Obj/Science	scientific name/catalog number
	By Collector	collector/catalog number/scientific name
	By Locality	locality/scientific name/catalog number
	By Class1-Discipline	classification line 1/scientific name/catalog number
	By Record ID	catalog number/scientific name/description
	By Object Status	object status/catalog number/scientific name
	By Collection Date	collection date/catalog number/scientific name
	By Eminent Figure	eminent figure/catalog number/scientific name
	By Eminent Org	eminent organization/catalog number/scientific name
	By Identified By	identified by/catalog number/scientific name
	By Ident Date	identified date/catalog number/scientific name
	By Common Name	common name/catalog number/scientific name
Accessions Associated Module	*By Accession Number	accession number/description
	By Source Ind	source individual/accession number/description
	By Source Inst	source institution/accession number/description
	By State Site	state site number/accession number/description
	By Project Date	project date/accession number/description
	By Acq date	acquisition date/accession number

Conservation Associated Module	*By Catalog Nbr	catalog number/cons due date
	By Due Date	cons due date/catalog number
Exhibits Associated Module	*By Exhibit ID	exhibit ID/title
	By Title	title/exhibit ID
	By Reverse End Date	end date/exhibit ID
Loans Out Associated Module	*By Loan ID	loan ID/borrower/loan description
	By Borrower	borrower/loan ID/loan description
	By Loan Description	loan description/loan ID/borrower
	By Reverse End Date	end date/loan description/loan ID/borrower
	By Reverse Extension Date	extension date/loan ID/loan description
Loans In Associated Module	*By Accession #	accession number/lender individual/loan description
	By Lender	lender individual/accession number/loan description
	By Loan Description	loan description/accession number/lender individual
	By Reverse End Date	end date/loan description/accession number/ lender individual
	By Reverse Extension Date	extension date/accession number/loan description
Preparation/Treatment Associated Module	*By Catalog Number	catalog number/due date/field observation
	By Due Date	catalog number/due date/receipt condition
	By Receipt Cond	receipt condition/catalog number/due date
Maintenance Associated Module	*By Catalog Number	catalog number/due date/purpose
	By Due Date	due date/catalog number/ task
	By Task	task/catalog number/due date
	By Frequency	frequency/catalog number/due date
Deaccessions Associated Module	*By Deaccession Nbr	deaccession number/deaccession type
	By Deaccession Type	deaccession type/deaccession number
Restrictions Associated Module	*By Restriction Nbr	restriction number
Locality Associated Module	*By Locality	locality/locality description

Artist/Maker/Eminent Figure Associated Module	*By Artist	name
Names and Addresses Associated Module	*By Name ID	name ID
	By Last Name	last name/name ID
NAGPRA Associated Module	*By Context ID	context ID/synopsis
	By Supt. Name	superintendent name/context ID/synopsis
	By Decision Date	decision date/context ID/synopsis
	By Record ID	context ID/synopsis

Some sorts are compound sorts. This means they have a primary sort field and a secondary sort field. This is useful for fields that can have the same value for many records. For example, many records can have the same object name, so a secondary sort by catalog number is included in the By Object Name sort. The records sort by Object Name first, then within each unique object name by catalog number.

2. *Can I add sort orders and preselected sort fields?*

There are several ways to sort the data by other fields that aren't on the sort list and to change the fields that appear in the List Pane.

- Use Quick Sort in the List Pane to sort on a different field that is displayed in the List Pane. See Section D below for further information on using Quick Sort.
- Use My List View to define specific sort fields and fields displayed in the List Pane. See Section E below for further information about My List View.
- You can specify List Pane fields and sort fields to use with Advanced Filters. Refer to Section II of this chapter for information on Advanced Filters.

You cannot remove existing sort orders or preselected sort fields from the program.

D. Quick Sort

1. *What is Quick Sort?*

Quick Sort allows you to sort records in the List Pane by any field displayed in the List Pane.

2. *How do I use Quick Sort?*

To sort by a field in the List Pane that is different from the sort selected:

- Select a sort or My List View from the pull down menu on the button bar or from Sort on the Record menu.
- In the List Pane, click on the column header of the field by which you want to sort the records.

Note: The direction of the arrow displayed in the column header indicates whether the records are displayed in ascending (A-Z) (up arrow) or descending (Z-A) order (down arrow).

- To reverse the order of the quick sort, click the column header again to change the direction of the arrow.

3. *How do I select the fields to display in the List Pane so that I can use Quick Sort?*

To change the fields displayed in the List Pane, use the My List View sort option which is available in all modules and associated modules. Then use the Update My List View option on the View menu to select the fields to display. See Section E below for further information on My List View.

4. *Can I use Quick Sort on a Tag Set?*

Yes. You can use Quick Sort on the fields displayed for a tag set by clicking the column headers.

5. *Can I use Quick Sort with a filter?*

Yes. You can use Quick Sort with Advanced Filters and Quick Filters by clicking the column headers.

6. *Where else can I use Quick Sort?*

You can use Quick Sort in any window that contains column headers. For example,

- supplemental records where you have multiple supplementals of a specific type
- associated module item lists that display attached catalog records
- Tag Set Management list of tag sets
- Quick Reports report template and results lists
- Advanced Filter list of available filters
- Quick Entry formats

E. My List View

1. *What is My List View?*

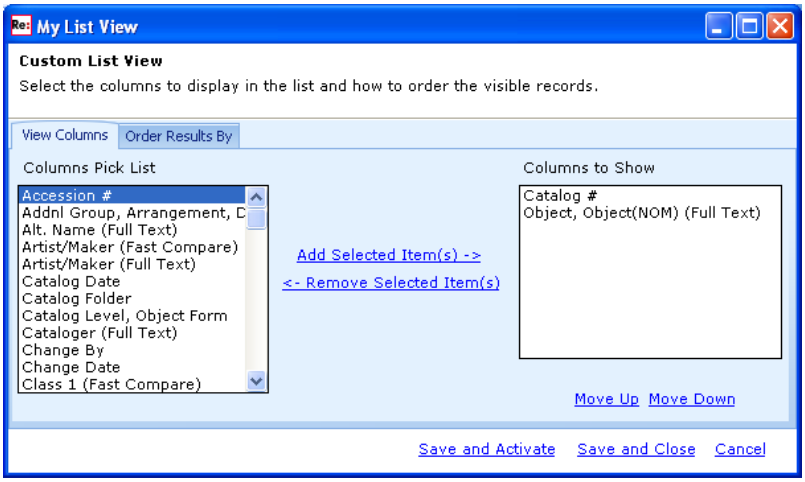
Each user can create a personalized sort choice called My List View in each module and associated module. By default, the fields that display in the list pane and order in which the records display for My List View is the same as the default sort for that record type (catalog records, accessions, exhibits, etc.).

2. *How do I change the fields displayed in the List Pane for My List View?*

To change the fields displayed for My List View:

- Select Update My List View on the View Menu, *or*

- Right-click in the List Pane and select Update My List View



- On the View Columns tab in the My List View window, select the field in the Columns Pick List you want to display in the List View. You can highlight more than one at a time by using Shift-Click or Ctrl-click.

- Click Add Selected Item(s). The fields will appear in Columns to Show.

- To change the order of the fields, highlight the field in Columns to Show and use Move Up and Move Down.

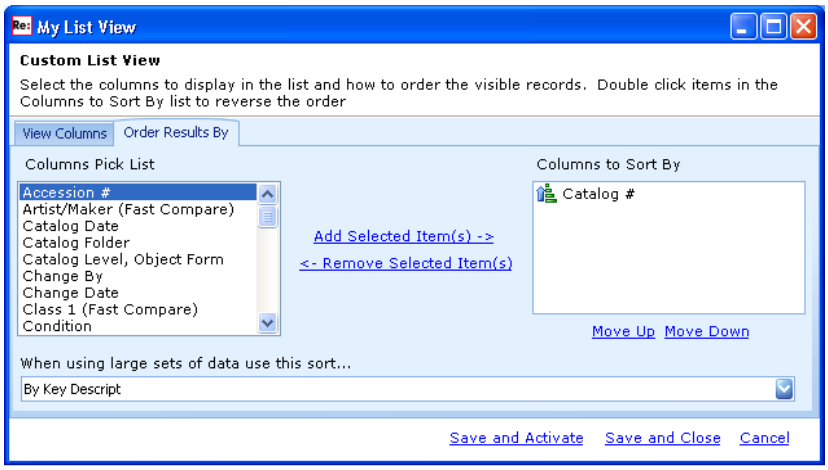
- When you have finished adding fields to the list, click Save and Activate if you want to save the list and immediately active the My List View field options in the List Pane. You can also click Save and Close to save the changes without activating My List View.

3. *How do I specify the sort order for My List View?*

To specify the fields to sort by in My List View:

- Select Update My List View on the View menu or from the right click menu in the List Pane.

- Select the Order Results By tab in the My List View window.



- Select the field in the Columns Pick List you want to sort by. You can

highlight more than one at a time by using Shift-Click or Ctrl-click.

- Click Add Selected Item(s). The fields will appear in Columns to Sort By.

- To change the order of the fields, highlight the field in Columns to Show and use Move Up and Move Down.

Note: If you choose more than one field to sort by, the first field in the list will be the main sort field, the second field will be the secondary sort field, and so on. For example, you could choose Material as the first field and object name as the second field. The records will sort by Material first, then within each material type by object name.

- Double-click on a field on the Columns to Sort By box to toggle between ascending (A-Z) and descending (Z-A) order.

- When you have finished selecting the sort fields, click Save and Activate if you want to save the list and immediately active the My List View sort. You can also click Save and Close to save the changes without activating My List View.

For more information on the option regarding large data sets see Chapter 9, Section VII, System Options – Large Data Sets and Paging.

You can change the settings for My List View at any time and in any module to suit your needs at that moment. The program remembers the last settings you saved.

VI. GET

A. Overview

1. *What is the Get function?*

The Get function allows you to go to a specific record, in order by the current sort. You can also use it to jump to a specific section of your records.

The Get function is tied to your current sort order. If your records are sorted by catalog number, Get will ask for the catalog number you want to go to. If you are sorted by object name, Get will ask for the object name and the catalog number (optional) you want to go to. For more information on Sorts, see Section V of this chapter.

2. *Why would I use Get instead of Word Search?*

Get allows to you go to a specific record but does not limit your visible data to only that record as Word Search does.

3. *Where is the Get function located?*

Get is accessed from the Record menu or by clicking the key button on the button bar. You can also press F8.

B. Get a Record

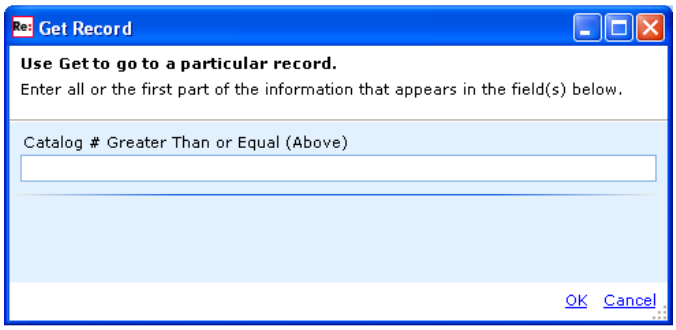
1. *How do I use Get to go to a specific record?*

To use Get, first determine what sort you want to use to get a record. If you know the exact catalog number, for example, choose the By Catalog Number sort. If you only know the object name of an item, choose the By Object Name sort. If you are in an associated module such as Loans Out and only know the borrower, select the By Borrower sort. (Choose the sort you want on the button bar in any module.)

Then click the Get button on the button bar, choose Get from the Record menu, or press F8.

Following are a few examples of Get using different sorts.

Example 1: Catalog records sorted By Catalog Number

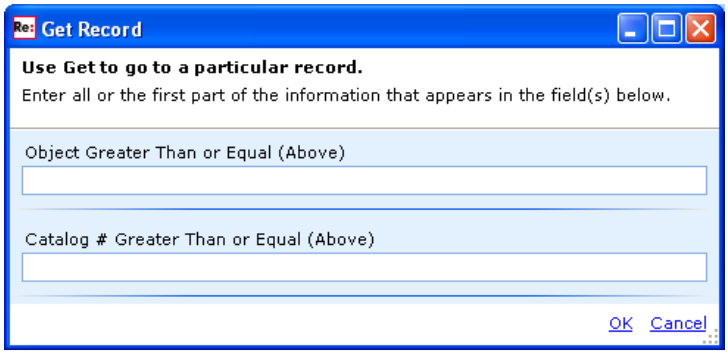


- To find a specific catalog number, type the catalog number you wish to go to. For example, 'PARK 1234' or 'BIA 1967.01.039'.

Note: This sort is not case sensitive, so you could also enter 'park 1234'.

- Press enter or click OK to go to that record. The List Pane will jump to that record and the Record Pane will display the catalog number you entered.

Example 2: Catalog records sorted By Object Name

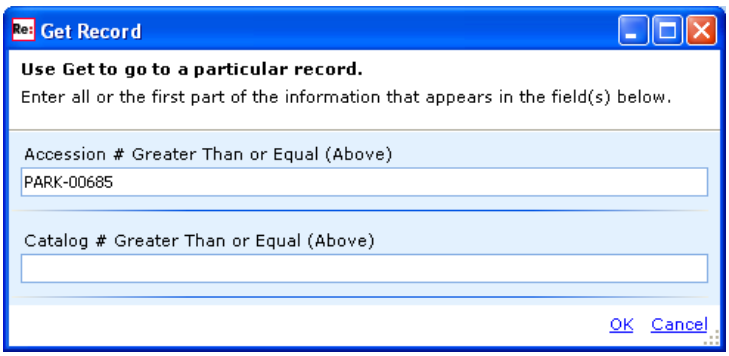


- To find a specific object name, enter all or part of the object name in the first field. For example, enter 'flag' for the object name. Since there can be more than one record with the same object name, you can enter the catalog number in the second field but it is not required. Get will go to the first record that satisfies the information typed into the fields. Scroll through the records in the List Pane to find the exact record.

Note: If you are unsure of the object name, enter only part of the name and the system will take you to the first record that matches the requested object name or to the location in the list where that name would occur alphabetically. For example, you could enter 'chip' for object name, but 'chip' is not an object in your data. The next closest match is 'chipped stone'. The program will take you to that section of the list starting with 'chipped stone'.

- Press enter or click OK to go to that record. The List Pane will jump to the closest record that matches your criteria.

Example 3: Catalog records sorted By Accession Number

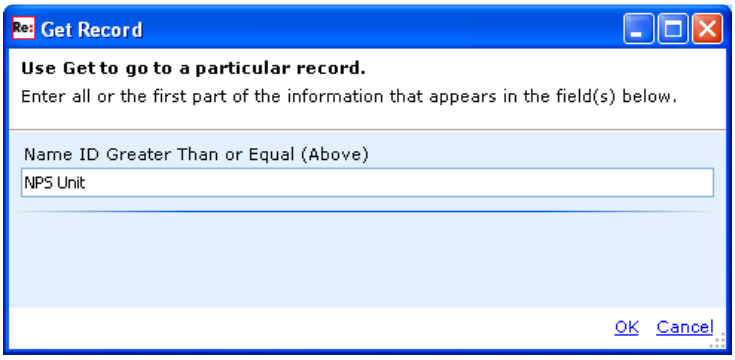


- To go to a specific accession number, enter the accession number in the first field. You must format the accession number correctly for the program to take you to the right accession number. You must have the acronym, a dash, and the zero padded number. For example, enter 'PARK-00685'.

Note: This is also a sort that could have multiple records with the same accession number. You can enter the catalog number in the second field but it is not required.

- Press enter or click OK to go to that record. The List Pane will jump to the closest record that matches your criteria.

Example 4: Names and Addresses associated module sorted By Name ID



- To find a specific name in the Names and Addresses associated module, enter all or part of the name in the Name ID field. For example, enter 'NPS Unit'.

- Press enter or click OK to go to that record. The List Pane will jump to the closest record that matches your criteria.

VII. FIND RECORD

A. Overview

1. *When would I use the Find Record function?*

Use the Find Record function to find the next occurrence of a specific word or character string in your records. You can search forward or backward in the list. You can search within only one field, or within all fields.

2. *Where can the Find Record function be used?*

Find Record can be launched from the List Pane or Record Pane.

3. *Can I use Find Record on any field?*

When Find Record is used in the List Pane, it is limited to the fields shown in the List Pane. When Find Record is used in the Record Pane, you can search selected or all fields in the current record.

4. *Can I use Find Record to group records?*

No. Find Record does not group records. It is a "go to" function that simply takes you to the next record it finds that matches your entry.

5. *Will Find Record work in a tag set or filter?*

Yes. Find Record will search only your visible data. If you have a tag set or filter active, or select multiple records in the List Pane using Shift-click or Ctrl-click, Find Record will only search within those records.

6. *How do I access Find Record?*

To access Find Record:

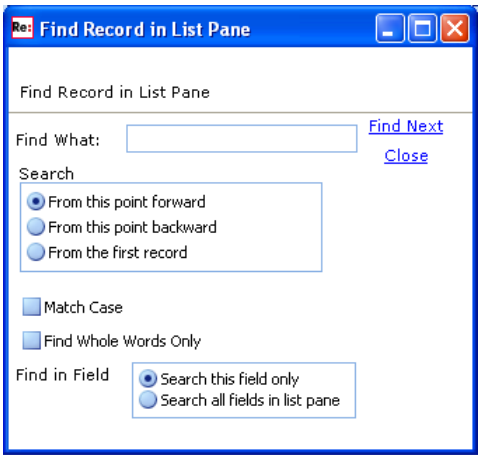
- Click the Find Record button on the button bar, *or*
- Choose Find Record on the Record menu, *or*
- Press Ctrl-F

B. Using Find Record

1. *How do I use the Find Record function in the List Pane?*

To use Find Record in the List Pane:

- Click in a column in the List Pane to select a field so that the List Pane is the active window.
- Click the Find Record button on the button bar, press Ctrl-F, or select Find Record from the Record menu. The Find Record in List Pane window will open.



- Type a word or phrase in the Find What field.

- Select which direction to search from the following options:

    - From this point forward: Searches forward, according to the current sort order, from the record selected in the list pane to the end of the visible data.
    - From this point backward: Searches backward, according to the current sort order, from the record selected in the list pane to the beginning of the visible data.
    - From the first record: Searches forward, according to the current sort order, from the first record in the visible data to the end of the visible data.

- Select "Match Case" if you want to find only those words whose case matches exactly what you type in the Find What field. "Basket" will not find "BASKET" if this option is checked.

- Select "Find Whole Words Only" if you want to find only words that are spelled exactly as what you type in the Find What field. "Basket" will not find "Basketry" if this option is checked.

- Select from the options in the Find in Field box:

    - Search this field only: Will only search in the currently selected field in the List Pane. Note: The selected field displays as white when selected.
    - Search all fields in list pane: Will search all fields that appear in the List Pane.

- Once you have selected all your options, click Find Next.

The system will go to the next record it finds in the List Pane according to your options that matches. That row will be selected.

- Click Find Next again to go to the next record that matches your options.

- Click Close when finished.

2. *How do I use the Find Record function in the Record Pane?*

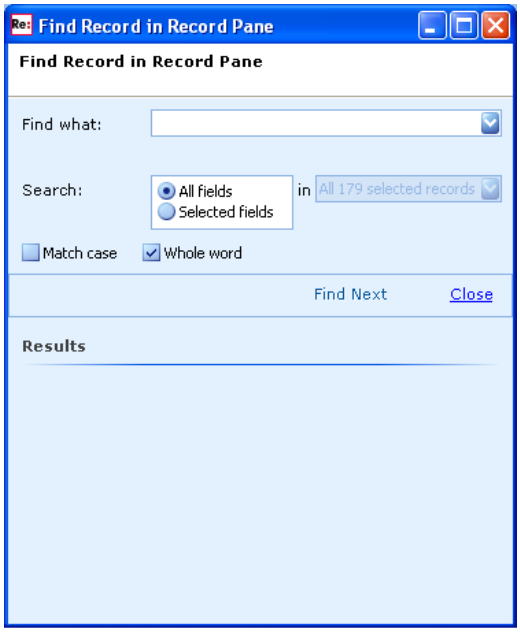
To use Find Record in the Record Pane:

- Activate a tag set or filter or select multiple records in the list pane using Shift-Click or Ctrl-Click.

Note: If you have not limited your visible data, you cannot use the Find Record function in the Record Pane. You will receive a message telling you that you must activate a filter, tag set, or select multiple records to use this function.

- Click in any field in the Record Pane.

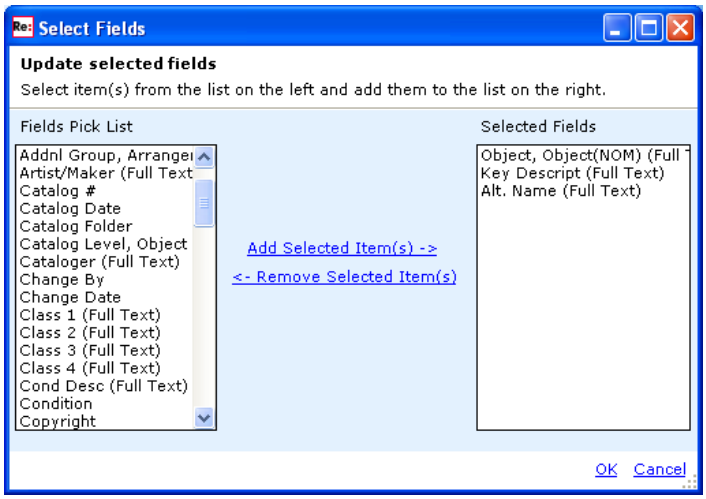
- Click the Find Record button on the button bar, press Ctrl-F, or select Find Record on the Record menu. The Find Record in Record Pane window will open.



- Type a word or phrase in the Find What field.

- Select where to search: All fields or Selected fields

  If you choose Selected fields, the Select Fields window will open.

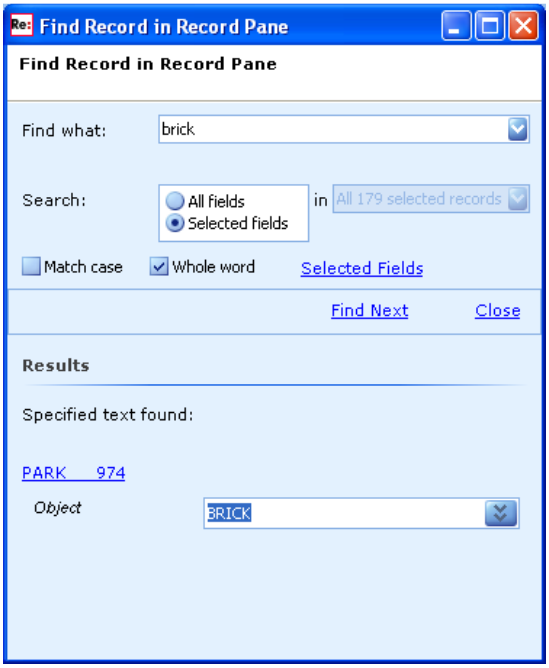


Select the field in the Fields Pick List on the left and click Add Selected Item(s) to add them to the Selected Fields list on the right. Click OK when finished selecting fields. The Find Record function will search for the word or phrase only in the fields you select.

- Check "Match Case" if you want to find only those words in the case that matches exactly what you type in the Find What field. "Brick" will not find "BRICK" if this option is checked.

- Check "Whole Word" if you want to find only words that are spelled exactly as what you type in the Find What field. "Brick" will not find "Bricklayer" if this option is checked.

- Click Find Next when your options are selected. The system will start at the beginning of the visible data and indicate the first record that matches in the Results section.



The primary key field (Catalog Number in Catalog Records, Exhibit ID in Exhibit Records, etc.) will appear under Results along with the field where the search matches.

The List Pane and Record Pane behind the Find Record window will also jump to the record where the text was found.

If you want to view the full record, click the primary key field under Results to bring up the record in a separate window.

- Click Find Next again to go to the next record that matches.
- Click Close when finished.

VIII. LIST PANE

A. Overview

1. *How can I use the List Pane for finding and grouping records?*

There are several ways to organize your data using the List Pane.

- Use the column headers in the List Pane to set a Quick Sort (see Section V of this chapter for information on quick sort).
- Use the column headers in the List Pane to set Quick Filters (see Section II of this chapter for information on quick filters).
- Use Find in the List Pane to locate records (see Section VII of this chapter for information on Find).
- Start typing in a selected column in the List Pane to quickly go to the next record that matches your typing.
- Highlight single and multiple records in the List Pane to perform other functions on the selected records.
- Use the column headers in the List Pane to group your records by a specific field.

2. *Can I change the fields that display in the List Pane?*

Yes. Use the Update My List View option on the View menu to change the fields that display in the List Pane. In addition, each predefined sort has a set of preselected fields that display in the List Pane. Refer to Section V of this chapter for more information on Sorts and My List View.

B. Using the List Pane to Group and Find Records

1. *How can I quickly find a record in the List Pane?*

To quickly go to a record in the List Pane by using a specific column:

- Click on any record in the column you want to use.
- Begin typing a character. The List Pane will advance to the first record it finds that matches the character(s) you type.
- Notice that the characters you type are highlighted in that column. You can continue to type characters and watch the List Pane advance to the first record that matches all characters typed.

Note: This option works best if you are also sorted by the field you are typing in, but it is not necessary.

To start over in the same column, you will have to either click on another record in that column, or backspace out the highlighted characters you typed.

2. *How do I select multiple records in the List Pane?*

There are two ways to select multiple records in the List Pane:

- Shift-click – selects consecutive records
- Ctrl-click – selects records that are not adjacent

Shift-click

If you want to select records in the List Pane that are immediately adjacent to each other, use the Shift-click method.

- Click on the first record you want to select.
- Hold down the shift key while you click on the last record in the group.

All records between the first and the last will be highlighted.

Note: To deselect the records, click on any record in the list without pressing Shift.

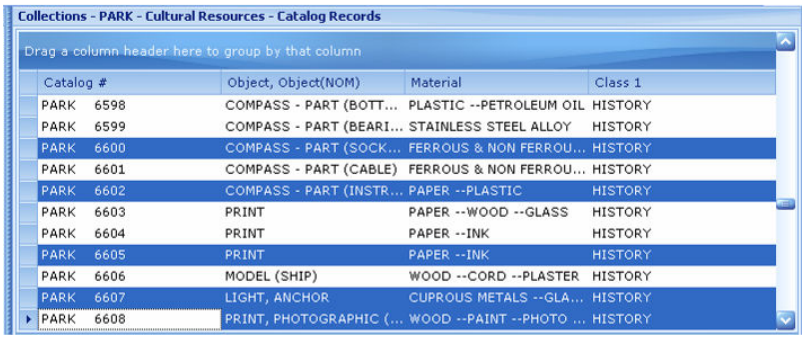
Ctrl-click

If the records you want to select are not adjacent to each other, use the Ctrl-click method.

- Click on a single record to highlight it.
- Hold the Ctrl key down and click on another record anywhere in the List.
- Locate the next record, hold the Ctrl key down again while you click on it.
- Continue locating and selecting records by holding the Ctrl key down before you click on each record.

Note: If you click on a record without holding the Ctrl key down, all other records you had selected previously will no longer be highlighted.

Also, if you accidentally highlight a record that you did not want to select, continue to hold the Ctrl key down and click on it again. It will be deselected while the rest of the records you have selected previously will remain highlighted.



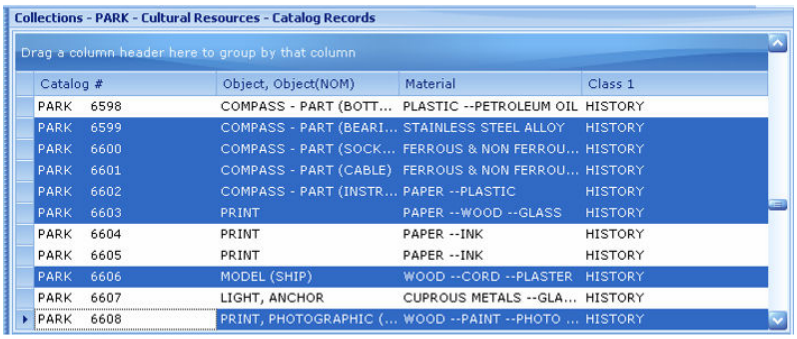
3. *Can I use both Shift-click and Ctrl-click in combination to select multiple records?*

Yes. You can combine these two methods only if you use Shift-click first.

- For the records that are adjacent to each other in the list, click the first one, hold down the Shift key and click the last one so that all records in between are also highlighted.

- Then, to select other individual records outside of the group already highlighted, hold down the Ctrl key and click on each record. The original group selected with Shift-click will remain highlighted while you select other records.

Note: You cannot use Shift-click after you have selected records using Ctrl-click. The previous records you highlighted will no longer be selected.



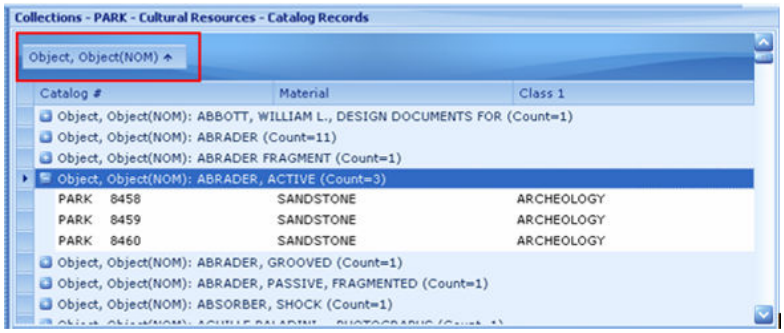
4. *How do I group records in the List Pane?*

You can group records in the List Pane by field values. To group records by the unique field values of a specific field:

- Right-click on a column header and choose Group By This Column, *or*

- Click and drag the column header to the area just above the column headers. This area is called the Group by Box and is indicated by the message "Drag a column header here to group by that column."

Note: If you do not see the Group by Box, right-click on a column header in the List Pane and choose Group By Box.



- Notice that the records are now sorted by this field. The List Pane displays the unique values for the grouped field with a count of how many records are included under each value.

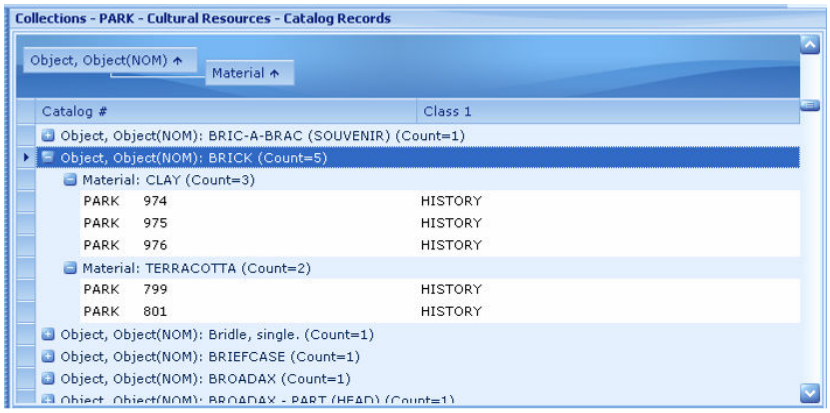
- To view the records for each value, click the + in front of the entry to expand the list. The records will be displayed below it.

To fully expand all groups, right-click in the Group byBox above the list pane and choose Full Expand. To collapse all groups, right-click in the Group by Box and choose Full Collapse.

5. *Can I group by more than one field?*

You can group by more than one field.

- With one column header already in the group box, click and drag another column header to the group box or right click on the column header and choose Group By This Column.



- Notice that the records are still grouped by the first field with the counts for that value indicated. Then, within each group, the records are grouped again by the second field that is in the group box.

- To view records in each group, click the + in front of the entry to expand the list. In the example above, the records are first grouped by object name and then by material within each object name. So the Object Name of 'BRICK' contains 5 records with 2 material types: 3 records with CLAY and 2 records with TERRACOTTA.

Note: You can group by any field that is displayed in the List Pane. But you must always leave at least one field in the column header row.

6. *Can I change the order of the grouped fields?*

Yes. You can change the order of the grouping. In the example above, to make the Material field the first group, click and drag the Material header into the position of the Object Name header. The headers will change places and the List Pane will refresh to display the new grouping order.

7. *Can I print the List Pane with the groupings?*

Yes. You can print the List Pane in the grouped format by using the Print List or Print Preview options on the button bar or from the File menu. You have the options to print the list as displayed or with the groups fully expanded or collapsed.

Refer to Chapter 5, Printing and Reports for further information on Print List and Print Preview.

8. *Can I use grouping on Tag Sets or Filters?*

Yes. You can use the grouping options in the List Pane on an subset of data including Tag Sets, Advanced Filters, and Quick Filters.

9. *How do I cancel grouping?*

To ungroup records:

- Drag the header(s) in the Group by Box back into the column header row, *or*
- Right click on a header in the Group by Box and select Ungroup, *or*
- If multiple headers are in the Group by Box, right click in a blank area of the Group by Box and choose Clear Grouping.

The List Pane will return to the regular list of records.