CHAPTER 8: MOVING AND SHARING DATA

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I. TRANSFER RECORDS TO ANOTHER DIRECTORY

A. Overview

1. *What is the Transfer Records to Another Directory function?*

The Transfer Record(s) to Another Directory function allows you to copy any records from one directory to another directory of the same type. You can copy a single record, a group of selected records, or the entire directory.

2. *Why would I need to transfer records to another directory?*

You may want to create a holding directory for records that you have not yet approved for inclusion in your main directory. Then transfer them to the main directory when you are sure they are accurate and complete.

3. *Can I transfer records in the associated modules from one directory to another?*

Yes. The Transfer Records(s) to Another Directory function is available in all modules and associated modules.

4. *When do I create and use a holding directory?*

Use holding directories to:

- keep an individual cataloger's work in one directory for review
- separate a contract cataloger's work for review before acceptance
- accept imported records and check them before moving them to your main database.

5. *How do I create a holding directory?*

Refer to Chapter 9, Tools, for instructions on creating directories.

B. Transferring Records to Another Directory

1. *What steps do I follow to transfer records from one directory to another?*

Transferring records is a multi-step process. You must:

- Activate a tag set, quick filter, advanced filter or select multiple records in the List Pane if you wish to transfer only a portion of your records.
- Transfer the selected record(s) or the entire directory.
- View records in their new directory.
- Delete the records in the holding directory.

Go to the directory that holds the record(s) you want to transfer.

If you want to transfer…	***Then…***
only one record in your holding directory,	go to the record that you want to transfer
some, but not all the records in your holding directory,	activate a tag set, filter or select multiple records in the List Pane of only the records you wish to transfer
all the records in your holding directory,	do not activate any subset of your data.

If you want to transfer all the records in a directory, you do not need to activate a tag set or any other subset. The Transfer function includes the option to transfer all visible records which is all records in the table if no subset is activated.

Refer to Chapter 7, Finding and Grouping Records, for information on tag sets, filters and selecting multiple records.

2. *Where is the Transfer Records to Another Directory function located?*

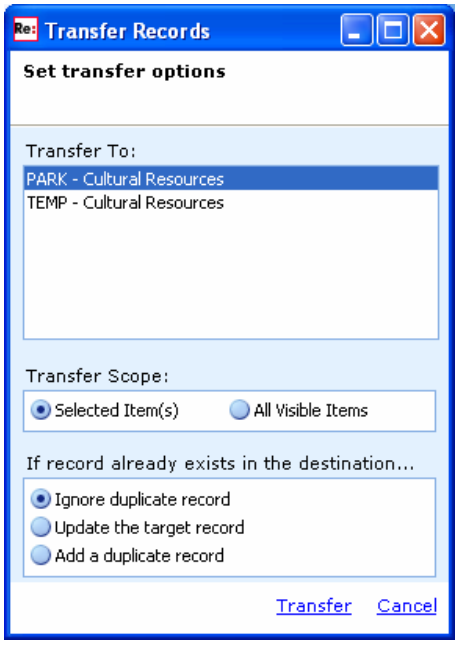
To get to the Transfer Record(s) to Another Directory function, you must be viewing records in a directory, then:

- Select Transfer on the File menu.
- From the Transfer submenu, select Transfer Record(s) to Another Directory.

3. *How do I transfer records to another directory?*

If you want to transfer only certain records, activate a tag set, filter or select multiple records in the List Pane first, then:

Select Transfer Record(s) to Another Directory on the Transfer submenu from the File menu, the Transfer Records screen appears.



Transfer To

The Transfer To box contains a list of your other directories of the same type. Single-click on the directory to which you want to transfer records.

Note: If you are transferring Cultural Resources catalog records, the list of directories will only show other cultural resources directories available in your system. However, if you are transferring records from an associated module, the list of directories will include all other directories that have the same associated module type available. For example, you can transfer Loans Out records from a Cultural Resources directory to a Natural History directory if desired. But you cannot transfer Cultural Resources catalog records to a Natural History directory.

Transfer Scope

Use the Transfer Scope options as follows:

- **Selected Item(s)** – Choose this option if you only want to transfer a single record, or you have multiple records selected in the List Pane. This option will only transfer the record(s) that is highlighted in the List Pane. To select more than one record in the List Pane, use Shift-Click or Ctrl-Click. (See Section VII of Chapter 7 for information on how to select multiple records in the List Pane.)

- **All Visible Items –** Choose this option if you want to transfer the entire contents of the directory, or the entire contents of a tag set, quick filter or advanced filter that is active.

Be careful if you choose All Visible Items. If you do not want to transfer the entire contents of the directory, you should activate a tag set, quick filter or advanced filter before you choose this option.

If record already exists in the destination…

The Transfer Records to Another Directory function includes a check for duplicate records. At the bottom of the transfer records screen, you can choose an action to take for duplicate numbers or key identifiers (e.g., catalog number, accession number, loan ID, name ID, etc.). The action that you choose affects all the records that you are transferring. Choose between:

- **Ignore duplicate record** – Choose this action if you don't want to transfer duplicate records.

- **Update the target record** – Choose this action if you want the records you are transferring to overwrite the records in the destination directory.

- **Add a duplicate record** – Choose this action to create duplicate records in the destination directory.

To select your choice, click on the button in front of the action.

After making your choices, click Transfer.

Click Yes to the Are you sure message.

Once the records are transferred, you will receive a confirmation message of how many records were transferred or ignored. Click OK.

4. *What must I do after the records are transferred?*

After transferring the records:

Check the records in their new directory to make sure that they are all there.

Then, delete the holding directory and all its records.

If you want to delete…	***Then use the…***
the holding directory and its records,	Delete a Directory utility.
the records and use the holding directory again,	go to Edit on the menu bar and choose Delete. Then choose Delete Multiple Records if you have a tag set, filter or multiple records selected in the List Pane.

The Transfer Records to Another Directory function copies the records from one location to another. It doesn't delete them.

Refer to Chapter 9, Tools, for instructions on deleting a directory.

II. TRANSFER RECORD(S) TO/FROM DISK

A. Overview

1. *What are the Transfer Records To and From Disk functions?*

The Transfer Records To Disk allows you to copy your records to an external file. This file can be used to load the data into another computer by using the Transfer Records From Disk function.

2. *Why would I need to transfer records to or from a disk?*

You may want to use the Transfer Records To or From Disk functions so you can:

- load records onto a stand alone machine such as a laptop
- send records to another park or center
- send records to a contract cataloger as examples of cataloging
- receive records from contract catalogers
- receive records from another park or center

3. *Will the Transfer Records external file include catalog and associated module records from the directory?*

No. The Transfer Record(s) to Disk will only include data from one table (catalog records or accession records or loan records, etc.). But you can use this function in any associated module to send or receive just those records.

4. *Can I transfer selected records only?*

Yes. You can select records to transfer to disk by activating a tag set, quick filter, advanced filter or selecting multiple records in the List Pane. You can also transfer all records if you wish.

B. Transfer Record(s) To Disk

1. *What steps do I follow to transfer records to disk?*

To transfer records to disk, you must:

- Activate a tag set, quick filter, advanced filter or select multiple records in the List Pane if you want to transfer a selected group of records. Otherwise you can only transfer the current record or all records.
- Select a location to save the resulting zip file.
- Transfer the records.

2. *How do I select the records to transfer?*

Go to the directory that holds the record(s) you want to transfer to disk.

If you want to transfer…	***Then…***
only one record in your holding directory,	go to the record that you want to transfer
some, but not all the records in your holding directory,	activate a tag set, filter or select multiple records in the List Pane of only the records you wish to transfer
all the records in your holding directory,	do not activate any subset of your data.

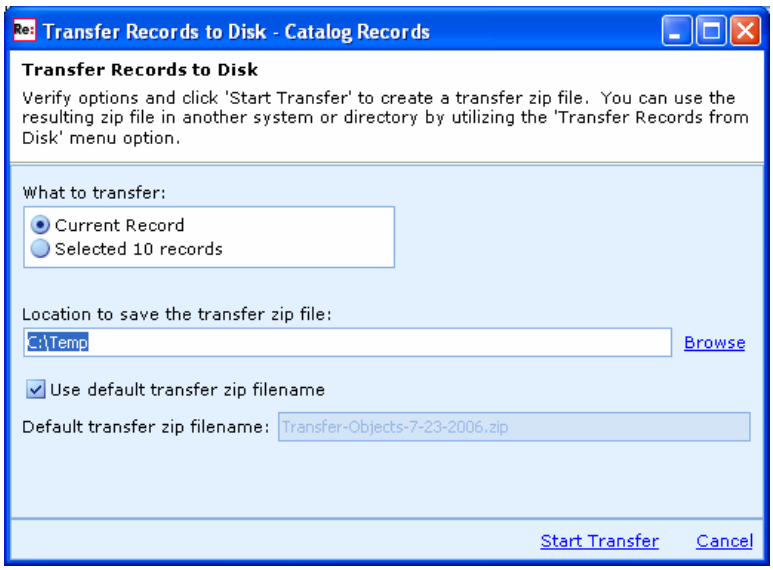
If you want to transfer all the records to a disk, you do not need to activate a tag set or any other subset. The Transfer Record(s) to Disk function includes the option to transfer all visible records which is all records in the table if no subset is activated.

Refer to Chapter 7, Finding and Grouping Records, for information on tag sets, filters and selecting multiple records.

3. *Where is the Transfer Record(s) to Disk function located?*

To get to the Transfer Record(s) to Disk function, you must be viewing records in a directory, then:

- Select Transfer on the File menu.
- From the Transfer submenu, select Transfer Record(s) to Disk. The Transfer Records to Disk window will open.



4. *How do I transfer records to Disk?*

If you want to transfer only certain records, make sure you have activated a tag set, filter or selected records in the List Pane. Then, to Transfer Records to Disk:

Choose Transfer Record(s) to Disk on the Transfer submenu located on the File menu.

What to Transfer

You have two choices for what records you want to transfer to disk:

- **Current Record** – Choose this option if you want to send only one record to an external file. The record transferred will be the one currently highlighted in the List Pane and shown in the Record Pane.
- **Selected ## records** – Choose this option to transfer a group of records to an external file. The number will indicate how many records are currently selected. This number could represent all records in the directory, the contents of a tag set, quick filter, advanced filter, or the number of records highlighted in the List Pane if more than one are highlighted.

Location to save the transfer zip file

Enter the location where the resulting file will be stored. The default location is usually "My Documents" on your computer. You can select a different location by clicking Browse.

Use default transfer zip filename

When this option is checked, the program automatically names the resulting file in the following format:

Transfer-*name of submodule-current date*.zip

Note: The *name of submodule* will be Objects for catalog records, Access for accession records, Exhibt for exhibit records, etc., depending on the type of records you are transferring.

If you want to enter your own file name, uncheck this option and a new entry box for the file name will appear for you to enter a new file name.

After selecting your options, click Start Transfer to send the records to an external file.

Once the records have been transferred, click OK on the confirmation message.

The resulting zip file is now available to send in the location you selected.

C. Transfer Record(s) from Disk

1. *Do I have to be in the directory where I want to load the records?*

No. The Transfer Record(s) from Disk wizard allows you to select the directory where you want to load the records.

2. *Do I have to be in the same associated module that matches the incoming records?*

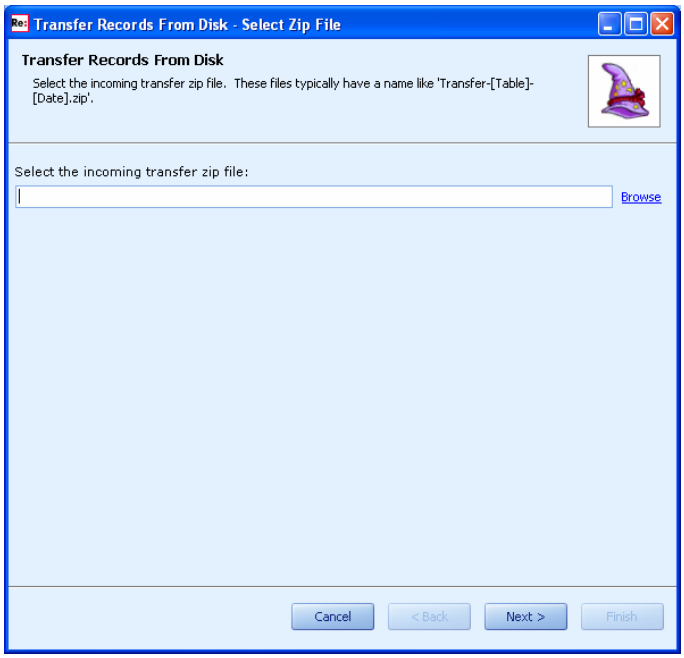
No. You do not have to be in the matching associated module or catalog records to Transfer Record(s) from Disk. You can be in any associated module or catalog records of any directory.

You can only use the Transfer Record(s) from Disk function to load data from a file created with the Transfer Record(s) to Disk function in another Re:discovery system.

3. *Where is the Transfer Record(s) from Disk function located?*

To get to the Transfer Record(s) from Disk function, you must be viewing records in a directory, then:

- Select Transfer on the File menu.
- From the Transfer submenu, select Transfer Record(s) From Disk. The Transfer Records From Disk wizard will open.

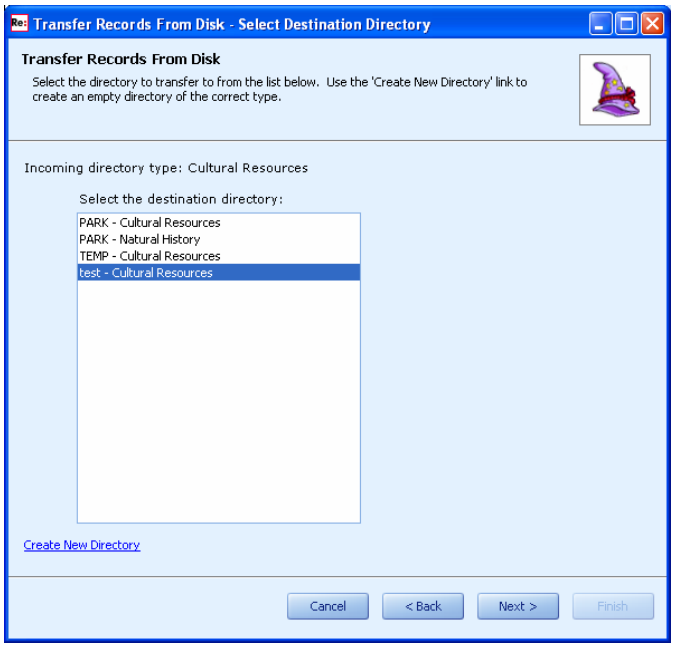


4. *How do I Transfer Records from Disk?*

To transfer records from a transfer zip file:

- On the first page of the Transfer Records from Disk wizard, type the path and file name of the incoming transfer zip file, or click Browse to locate and select the zip file. This file must be a valid zip file created using Re:discovery's Transfer Record(s) to Disk function. No other file types can be loaded with this feature.

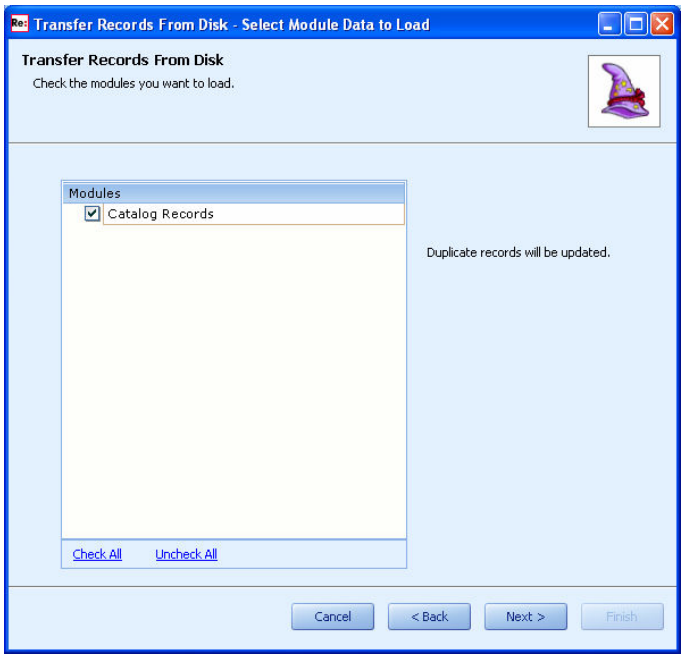
- After selecting the file, click Next.



- Select the destination directory. The system will show all available directories into which you can load these records.

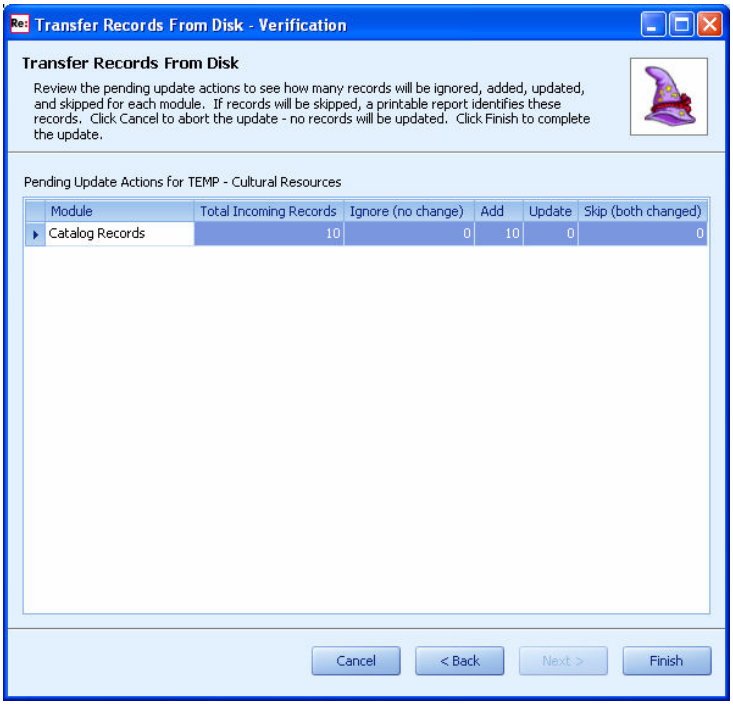
Note: You can also create a new directory to load the records by clicking Create New Directory at the bottom left (see Chapter 9, Tools, for information on creating directories). This is recommended if you do not want to overwrite existing records.

- After selecting the destination directory, click Next.



- The incoming data type will be selected. Click Next.

- You will be asked to confirm the data transfer. The process can take a long time if the zip file contains lots of records to load. Click Yes to continue. The zip file will be extracted (un-compressed) and a report of the transfer process will be prepared.



- The Verification window reports the total number of incoming records and shows the number that will be added and the number that will be updated. None will be ignored or skipped and no comparison of records takes place.

There is no comparison between incoming and existing records. If a duplicate record exists in the directory, it will be overwritten with the incoming record. If you want the system to ignore the duplicates, create a new directory, transfer the records into that directory, and then use the Transfer Record(s) to Another Directory (see Section I in this chapter) instead.

- After verifying, click Finish.

- You will get a confirmation message when the transfer is complete. Click OK.

Your records are now transferred into the directory.

Note: If you are currently in the table (catalog records, accessions, etc) where you loaded the records, you will have to click the Refresh button on the button bar or select Refresh from the Edit menu to see the newly loaded records.

III. EXPORT LIST

A. Overview

1. *What is the Export List function?*

The Export List function allows you to export the data in the List Pane to one of several file formats.

Note: You can change the fields that appear in the List Pane by using Update My List View. See My List View under Chapter 7, Section V, Sorts.

2. *What is the difference between Export List and Import/Export Selected Fields?*

The Export List function is a quick way to export just the fields you see in the List Pane to a specific predefined format. You do not have to set up templates as in import/export selected fields nor select field delimiters and text indicators.

In addition, the file format you select for Export List is automatically created. It does not create an ASCII delimited or CSV file that must be imported into the desired program.

However, since Export List only exports the fields displayed in the List Pane, the number of fields exported is limited. If you need to export many fields, it is best to use Import/Export Selected Fields. See Section IV of this chapter for information on Import/Export Selected Fields.

3. *What file formats are available to export the fields in the List Pane?*

You can export the List Pane data into any of these file formats:

- **Microsoft Excel:** a standard spreadsheet application. The data in the List Pane will be exported to an Excel file, where the columns and rows match the data you see in the List Pane. The column headers in the List Pane will be used as in the first row of the Excel spreadsheet.

Note: Only data exported to Excel format may be imported back into Re:discovery. However, we recommend using Import/Export Selected fields if you are exporting data to an external file, and plan to re-import that data later.

- **HTML:** a standard web-based document. The data from the List Pane will be viewable as a table. You can open an HTML file by double-clicking the file, or by opening the file in Internet Explorer.

- **PDF:** Portable Document Format, a common format for sharing documents. You can open a PDF file using the Adobe Reader.

- **Text:** a simple non-delimited text file. You can open a text file with MS Word, WordPad, or Notepad.

- **XML:** Extensible Markup Language. You can view an XML document with Internet Explorer.

4. *Where are the Export List options located?*

To access the Export List options, go to the File menu and choose Import/Export. The various Export List options are available on the submenu.

B. Exporting the List Pane

1. *How do I export the fields and data visible in the List Pane?*

To export the data in the List Pane:

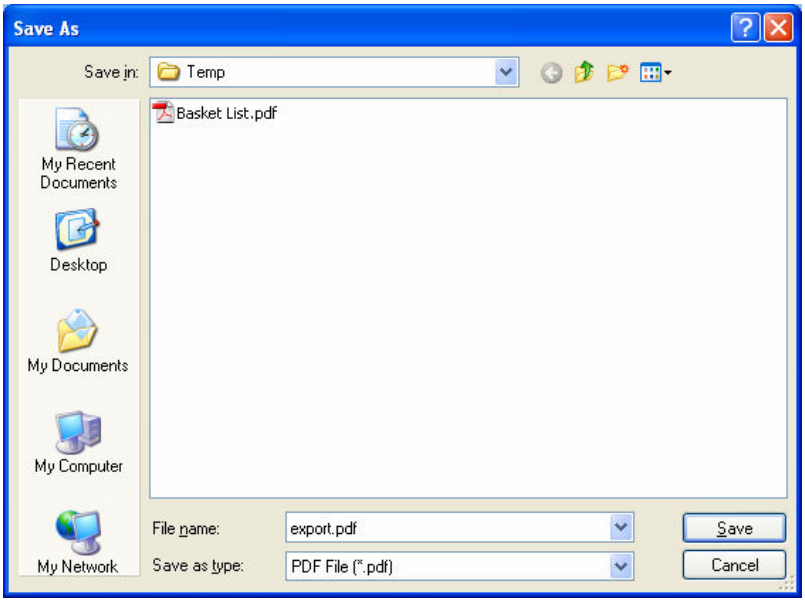
- If you do not want to export your entire table, select a subset of your data by activating a tag set, filter or performing a word search.

Note: You cannot use this function on a selection of data highlighted in the List Pane. It will export all data regardless of what is highlighted.

- If necessary, change the fields to the ones you wish to export by using the Update My List View option on the View menu. Refer to Chapter 7, Section V for information on My List View.

- From Import/Export on the File menu, choose one of the following Export List options:

  Export List to Excel
  Export List to HTML
  Export List to PDF
  Export List to Text
  Export List to XML



- In the Save As window, select the location where you wish to save the file by using the "Save in:" box at the top. Click the pull down arrow to select a different folder.

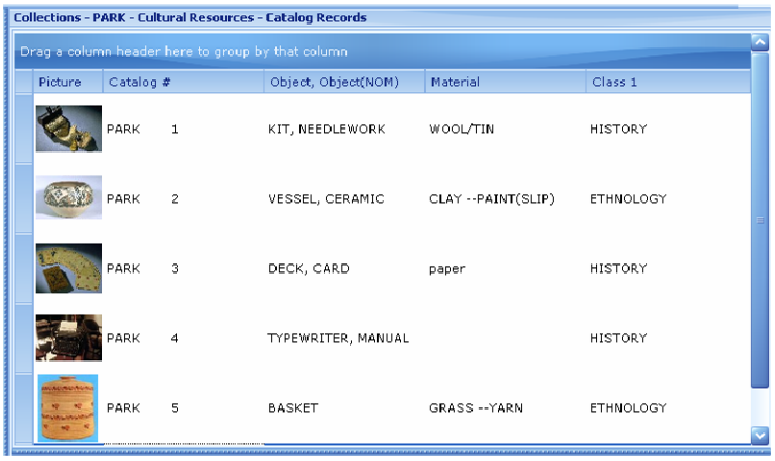
- The file name of "export" is automatically entered in the File Name field with the appropriate file extension for the format you chose. Change the file name if desired, leaving the file extension as entered.

- Click Save to export the records and save the file.

2. *Can I export images with the Export List function?*

Yes. If you have images showing in the List Pane, the thumbnail image will be exported along with the data fields only if you use the PDF file format.

Note: To display images in the List Pane, choose Show Images in List Pane on the View menu.



IV. IMPORT/EXPORT SELECTED FIELDS

A. Overview

1. *What is the Import/Export Selected Fields function?*

The Import/Export Selected Fields function allows you to transfer information to or from your **ANCS+** fields and other software applications.

2. *When will I use the Import/Export function?*

Use this function to:

- place data created outside **ANCS+** into **ANCS+** fields
- manipulate or share **ANCS+** data in another format

Example 1: A subject area specialist comes to your park to identify and catalog artifacts. You can include the expert's information in the catalog record even if he/she is unfamiliar with **ANCS+.** To do this, use the Import/Export function together with the Pre-allocate Records function to give the expert a set of fields to complete.

Use the Pre-allocate Records function to create empty records with sequential catalog numbers. *Export* these records into whatever database or spreadsheet format that the specialist uses.

When the specialist is done, *import* the records back into the master database and make whatever additions are necessary.

Refer to Section VI of Chapter 6 for information on the Pre-allocate Records function.

Example 2: Several local museums want to combine fields from your museum records with theirs to create a combined database for researchers. You can *export* your records to be combined, even if the museums are using different cataloging programs.

Use the Import/Export function to create an ASCII delimited text file of the records that you wish to provide to the collective database.

Give the ASCII file and the delimiters you used to the person combining the data.

The person receiving the file will be able to read your file in any standard spreadsheet or database.

3. *Which fields are available for export?*

You choose the **ANCS+** fields that you wish to export to other systems. Information created in other database systems can be imported into the **ANCS+** fields of your choice.

Note: Supplemental information cannot be exported or imported.

4. *What kind of software applications can accept my information?*

Your exported information can be accepted by:

- spreadsheets
- databases
- word processing systems

5. *What formats are supported by the Import/Export function?*

Fields can be imported and exported in an ASCII delimited or ASCII csv text format.

6. *What is ASCII delimited format?*

ASCII is the acronym for American Standard Code for Information Interchange. **ANCS+** can produce and accept records in ASCII text format. The fields are separated or "delimited" with characters that you specify. You choose other delimiters to tell which fields are text fields. Both the system you are exporting to and the one you are importing from must recognize these delimiters. Most databases support the import and export of ASCII delimited text files.

7. *What is ASCII csv format?*

ASCII csv format is also a delimited text file but the delimiters to separate the fields and identify text fields are predetermined. The field delimiter is a comma and the text indicator is a double quote. This type of file is mostly used by Microsoft Excel spreadsheets.

8. *How many fields will I be able to import/export at a time?*

You can import and export any number of fields. You may only choose fields located in your current module or associated module. You are therefore limited to the number of fields in your current module or associated module.

9. *Does this function work with memo fields?*

Yes, this function works with memo fields.

Note: Data in memo fields may contain keyboard carriage returns at the end of a paragraph or line. The system will substitute <CR> in your exported data whenever it finds a carriage return in your **ANCS+** data.

10. *Can I import or export supplemental data?*

No, you cannot import or export data in the supplementals. However, if you import location, condition or object status fields, the history tracking supplementals for these will be updated using the Track Changes window during import.

11. *Can I import or export individual subfields of formatted and repeating formatted memos?*

Yes, you can import and export data in individual subfields of formatted and repeating formatted memos.

Note: For repeating formatted memos, the data from the subfield of each entry in the grid will be exported with the repeating delimiter separating the entries. E.g., when exporting the City subfield from the Origin field that has 3 line entries, the data will appear like this: "St. Paul ||Detroit ||Chicago"

B. Exporting Fields in ASCII Format

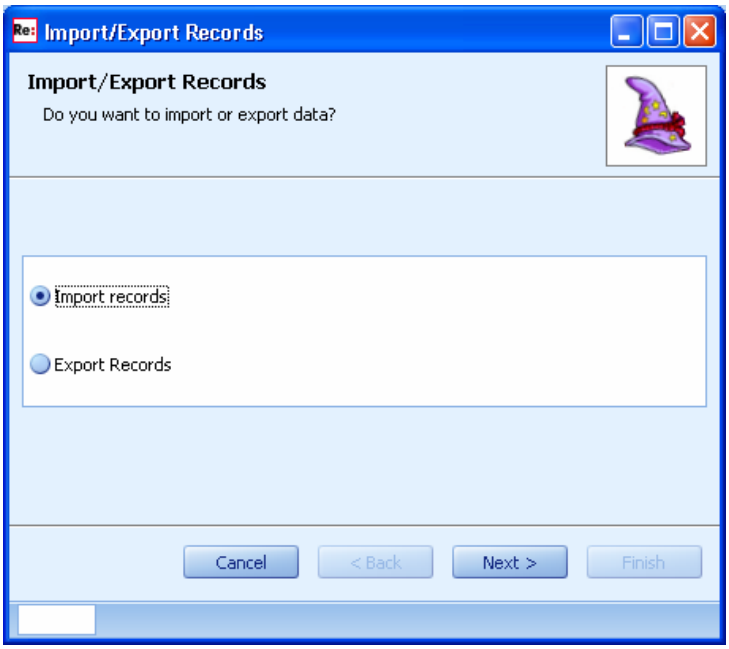
1. *How do I access the Import/Export function?*

You can access the Import/Export function from any collection or archive record or associated module.

To get to the Import/Export function:

- From File on the Menu Bar, choose Import/Export.
- On the Import/Export menu, choose Import/Export Selected Fields.

The Import/Export Records wizard appears.



2. *What steps do I follow to export fields from **ANCS+** records to another database?*

Exporting fields is a multi-step process. You must:

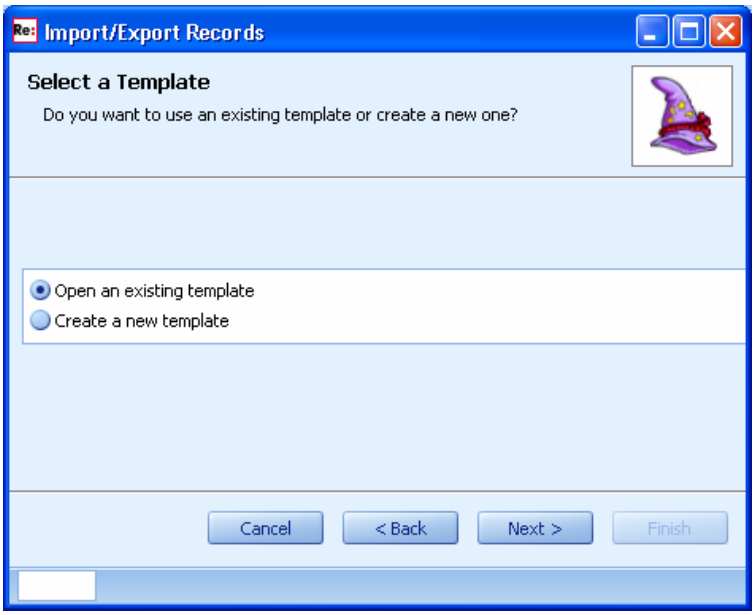
- Activate a tag set, filter or highlight several records in the list pane that you wish to export. If you do not limit your visible data, you will export all the records in your database. Refer to Chapter 7 for information about tag sets and filters.
- Create an import/export template or choose an existing template using the Import/Export wizard.
- Export the fields using the import/export template.

Note: The template you create is used with your visible data. You choose the fields and delimiters that you want. The system then creates the export file using the currently visible data. The template can be used again and again with different data.

The template you create can be used for both ASCII text export and ASCII csv export.

3. *How do I export selected fields?*

- On the first page of the Import/Export wizard, select Export records and click Next.



- Select one of the template options and click Next:

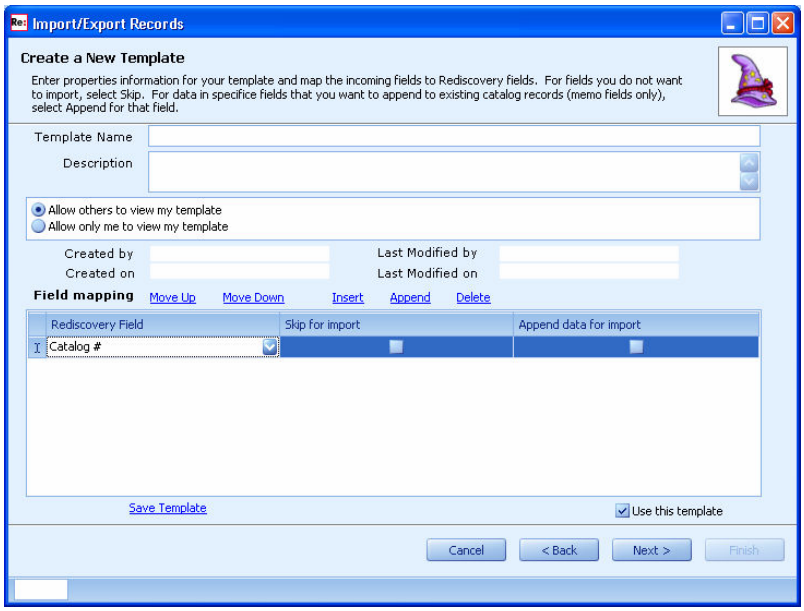
  Open an existing template – allows you to select or modify a template that has already been created. Templates can be used for both importing and exporting records.

  Create a New Template – allows you to set up a new template to select fields to export.

Note: If you have an existing template that has most of the fields you want to export, you can modify that template and add or remove fields as desired and even save it with a different name.

Create a New Template

When you click Next, the Create a New Template page opens. Complete the fields as follows:



Template Name
Enter a name for the template. You must enter a name or you cannot save the template or export records.

Description
Enter a description of the template for your reference. This field is optional.

Allow others to view my template/
Allow only me to view my template
Select whether to allow others to use your template or only you.

Note: Created by, Created On, Last Modified by and Last Modified on are system generated using your user id and current date.

Field Mapping
To add fields to the template:

- Click Append. A new line appears in the grid.
- Choose the field name from the pull down menu in the Rediscovery Field column.
- Add all fields desired in this manner. Each time you click Append a new line appears at the bottom. You can also click Insert to add a field above the field selected in the grid.

Note: It is recommended that the catalog number or main identifying field such as Artist name or Loan ID be the first field in your template. The remaining fields in the template can be in any order for exporting. Use the Move Up, Move Down, Insert and Delete options to arrange or remove the fields in the template to match the incoming data.

Tip: You can export individual subfields of formatted or repeating formatted memo fields. The subfields will be listed in the pull down menu with their main field name preceding the subfield name. For repeating formatted memos, the exported data will have the repeating delimiter (space-pipe-pipe (||)) inserted between each entry from the grid – e.g., "City A ||City B"

You cannot change the Rediscovery field label that exports with the data.

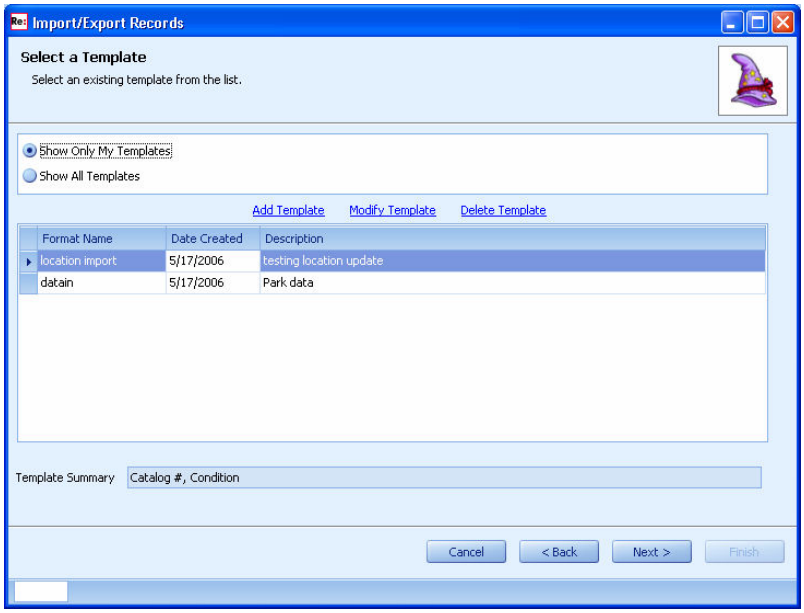
Note: The "Skip for import" and "Append data for import" check boxes next to the fields are for importing data only. See Section C below.

Save Template
When finished adding fields, click Save Template. If you do not save the template, when you click Next the system will prompt you to save the template.

Use this template
You can create multiple templates that you may not want to use for exporting data. Uncheck this option if you do not want to use this template for exporting the current data. When you click Next, you can then select or create another template to use instead.

Open an existing template

The following page will appear when you click Next allowing you to select the template.



Select to show only your templates or all templates by choosing one of these options:

> **Show Only My Templates** – lists only those templates created by you.
> **Show All Templates** – lists all shared templates in the directory.

The list of templates appears in the grid.

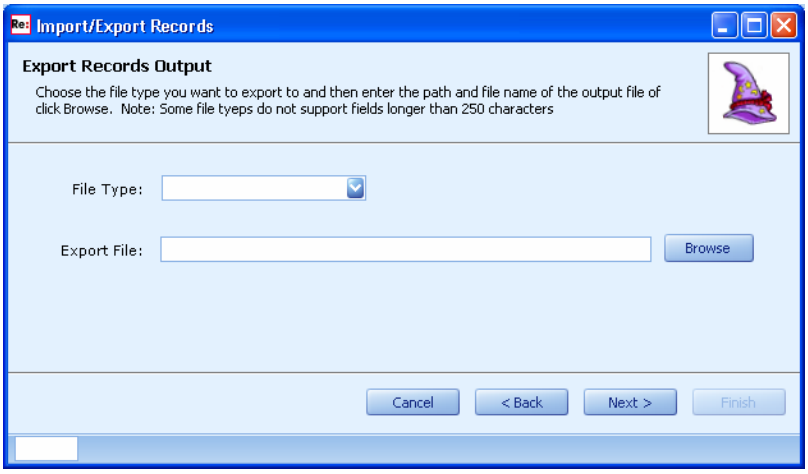
Template Summary
This field shows the list of fields that are included in the selected template.

Add Template
You can add new templates from this page by clicking the Add Template option.

Modify Template
This option allows you to modify the selected template to change fields or description.

Delete Template
This option will permanently delete the selected template.

- After selecting or creating a new template as described above, click Next. The Export Records Output page will appear.



- **File Type:** Choose the type of export file you want to create by choosing one of two options from the pull down menu.

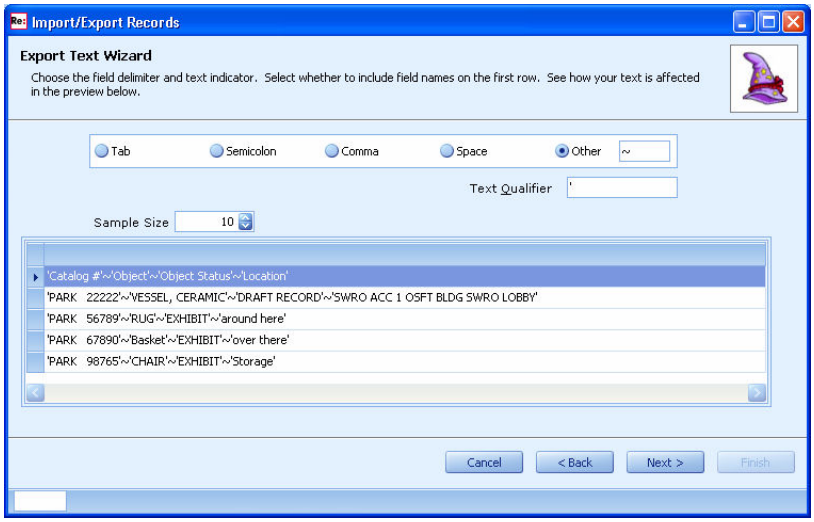
  ASCII delimited – a text file (.txt) that you specify the field delimiter and text qualifiers. This is recommended if the data contains commas or double quotes so that you can select different symbols.

  ASCII csv – a comma delimited file (.csv) (used primarily by Microsoft Excel©). You do not have a choice of field delimiter or text qualifier for this format. It is always a comma and double quote, respectively. Do not use this format if your data contains commas or double quotes.

- **Export File:** Enter a path and file name for the export file, or click Browse to select a location and enter a file name.

Note: If you do not enter a path with the file name, the file will be saved in a pre-selected location. You will be notified of this location once the export is complete.

- Click Next after entering the file type and export file name.



- Select the **Field Delimiter** you want to separate the fields. You have a choice of Tab, Semicolon, Comma, Space or you can enter a character by selecting Other and typing the character in the field.

- Then enter a **Text Qualifier** (if desired). The Text Qualifier can be any character.

Note: If you are exporting to an ASCII csv file type, the Field Delimiter (comma) and Text Qualifier (“) will already be selected for you. You cannot change these for a csv format.

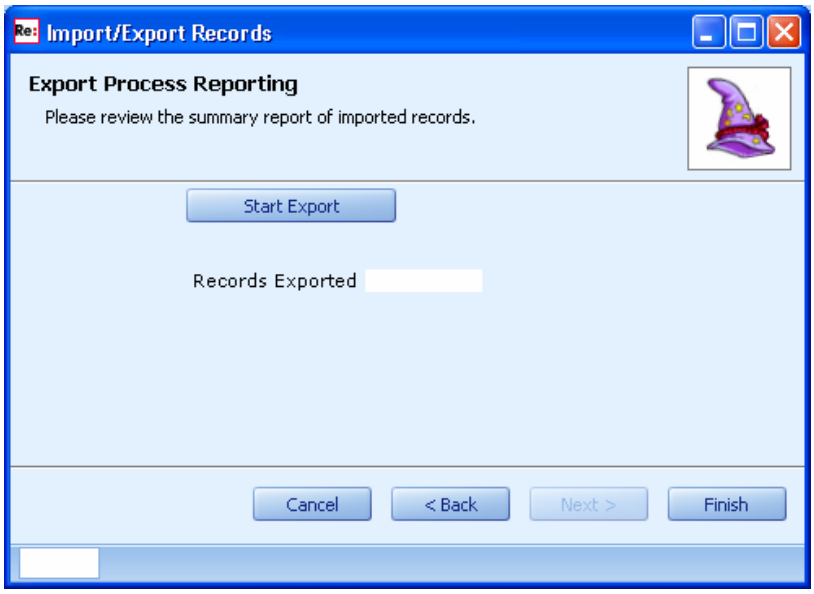
Tip: If you need non-keyboard characters for the Field Delimiter and Text Qualifier, right click in the Other field or Text Qualifier field and choose Extended Character Set to select an ASCII character.

The grid will show a sample of records from the data you are exporting. You can change the sample size by increasing or decreasing the number.

Notice how the sample of the data changes when you select the field delimiter and text qualifier.

Tip: If your data contains commas, double quotes, spaces, etc., you should choose a field delimiter and text qualifier that do not exist in your data. Some useful characters for this purpose which generally do not appear in your data are the tilde (~), pipe (|), carat (^), and plus (+).

- Click Next after making your selections.



- Click **Start Export** to export your data. You will be asked to confirm the export. Click Yes.

- When the export has finished, a message will appear indicating the path and name of the export file and the number of records exported. Click OK. The number of records exported will also be displayed on the page above.

- Click Finish to close the Import/Export wizard. The export file is now available in the location you selected.

4. *How do I import this file into another format?*

Check the manual for the program into which you are importing the data. It should tell you how the program imports ASCII delimited and csv text files. Most XBASE databases have instructions on how to import data. Most Windows-based programs will prompt you when you attempt to open the file.

C. Importing Selected Fields

If done incorrectly, the import process can damage your existing ANCS+ data records. If the records being imported are new, it is recommended that you establish a "holding" directory to receive imported data. Use the Create a New Directory option (Chapter 9, Tools) to create a holding directory. This will let you check that the data were properly imported before you transfer the data to your main collection directory.

If the incoming records will be updating selected fields of existing records, it is recommended that you make a backup of your main directory first. Use the Backup Data option (Chapter 9, Tools) to make a backup of your directory before you begin.

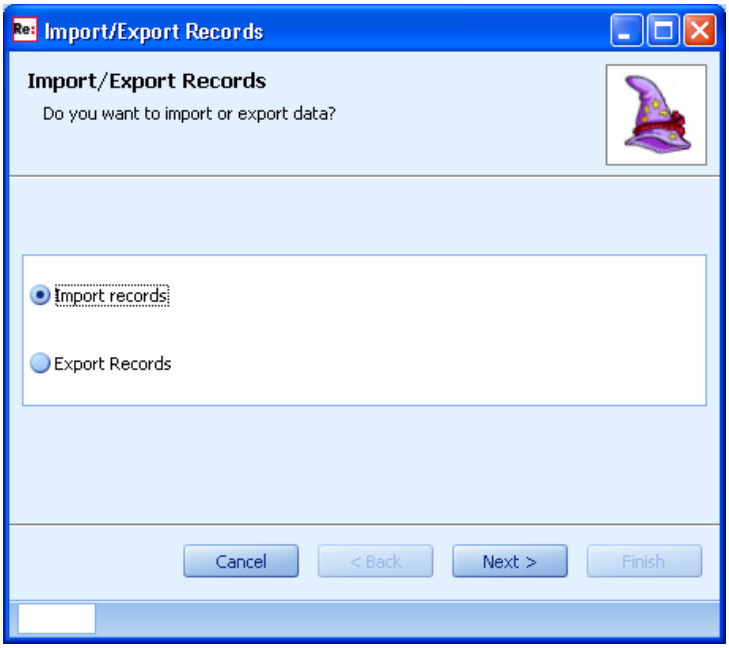
1. *How do I access the Import/Export function?*

You can access the Import/Export function from any collection or archive record or associated module.

To get to the Import/Export function:

- From File on the Menu Bar, choose Import/Export.
- On the Import/Export menu, choose Import/Export Selected Fields.

The Import/Export Records wizard appears.



2. *What steps do I follow to import data from another database into **ANCS+**?*

Importing fields is a multi-step process. You must:

- First, export or save the data from the other database into an ASCII delimited text file (file with a .txt extension) or "comma separated value" file (file with a .csv extension). In Microsoft Excel, you can use the File, Save As… option. In Microsoft Access, you must "export" the file to one of those formats. For help, use the instructions or help provided with the other database program you are using.
- Create an import/export template or choose an existing template using the Import/Export wizard.
- Import the fields using the import/export template.

You create or choose the import/export template that you want to use to import data. When you choose or create your import/export template, make sure that:

- The first field in your import/export template and the first column in the file you are importing are the unique key field for the data you are importing. For ANCS+ catalog records, Catalog # should always be the first field in your template and the first column in the file you are importing.
- The import/export template has the same number of fields as the incoming data
- The fields in the incoming data and import/export template are in the

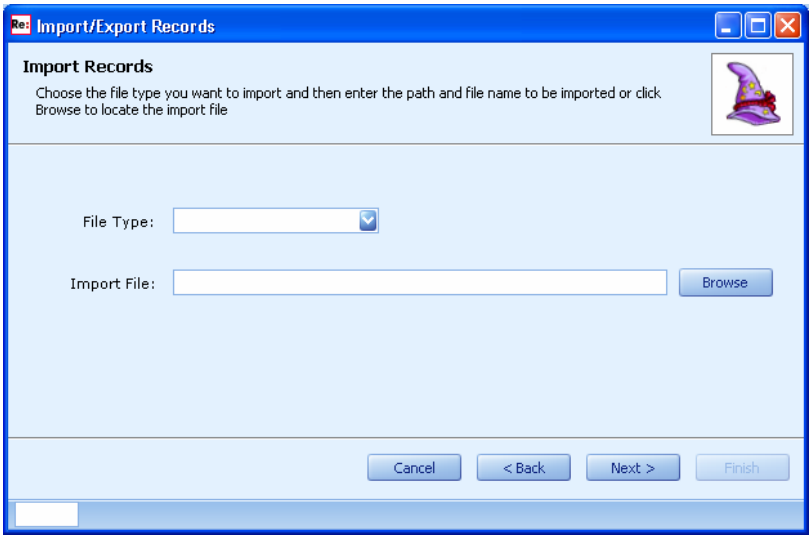
same order.

- The field labels in the incoming data match the import/export template field labels exactly.

Note: There is an easy way to ensure that your import format will match the **ANCS+** database structure. Create an export format with the data fields you need. Use it to export a small set of data to the other application (the one you want to import data from later). Make sure that the data you will import matches the structure of this small export file.

3. *How do I import selected fields?*

- On the first page of the Import/Export wizard, select Import records and click Next. On the Import Records page that appears, select the incoming data file and type.



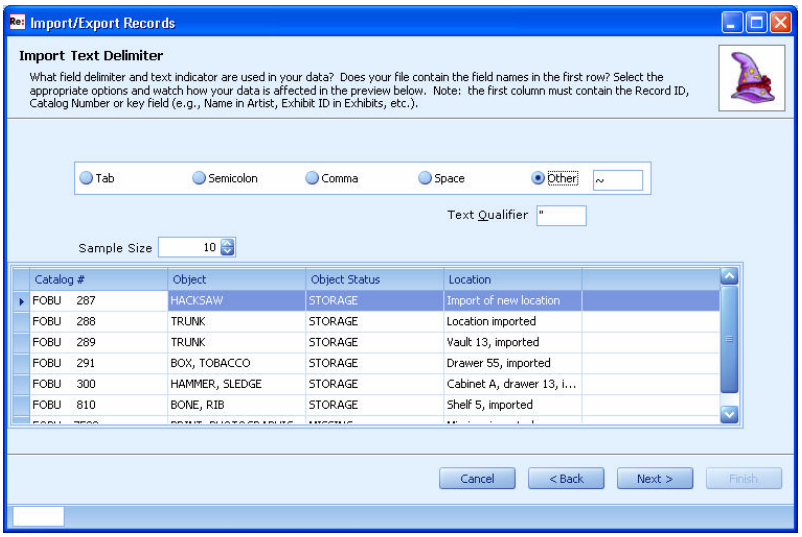
File Type
Select the type of file that you are importing from the pull down menu for File Type. You have two choices:

ASCII delimited – a text file (.txt) with field delimiter and text qualifier exported from another program such as Microsoft Access©.

ASCII csv – a comma delimited file (.csv) usually exported from Microsoft Excel©.

Import File
Enter the path and file name of the import file, or click Browse to locate and select the file. **Note:** The type of file you choose in File Type determines the file types shown in the Open dialog box when you click Browse.

- Click Next after making your selections.



- If you are importing an ASCII delimited file, choose the **Field Delimiter** that was used to separate the fields.

- Enter the **Text Qualifier** that was used to indicate text (if any).

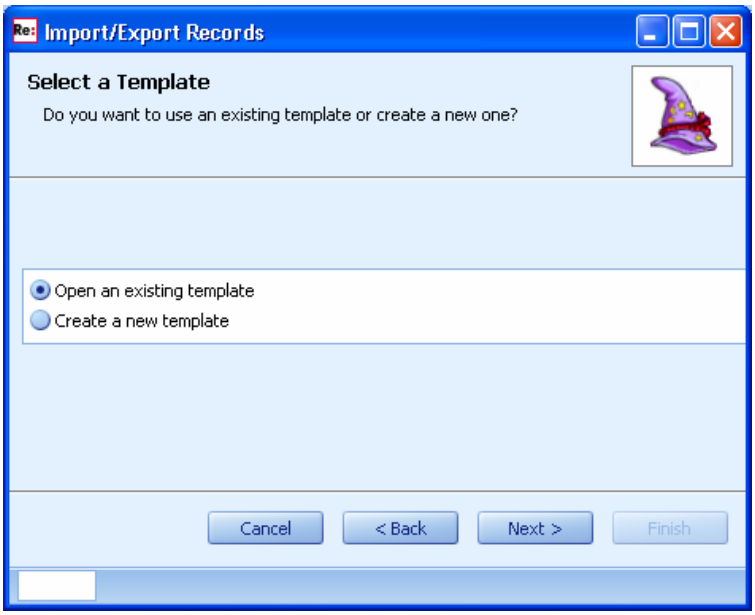
The delimiters in the Field Delimiter and Text Qualifier must match the delimiters used in the incoming data file you are importing.

Tip: If you need non-keyboard characters for the Field Delimiter and Text Qualifier, right click in the Other field or Text Qualifier field and choose Extended Character Set to select an ASCII character.

Note: When importing ASCII csv files, you do not need to select the Field Delimiter and Text Qualifier. These are automatically set as Comma and double quotes (“), respectively, and cannot be changed.

A sample of your incoming data is displayed. You can increase or decrease the number of records shown by changing the number. Watch how the columns and data change when you select the correct field delimiter and text qualifier.

- Click Next.



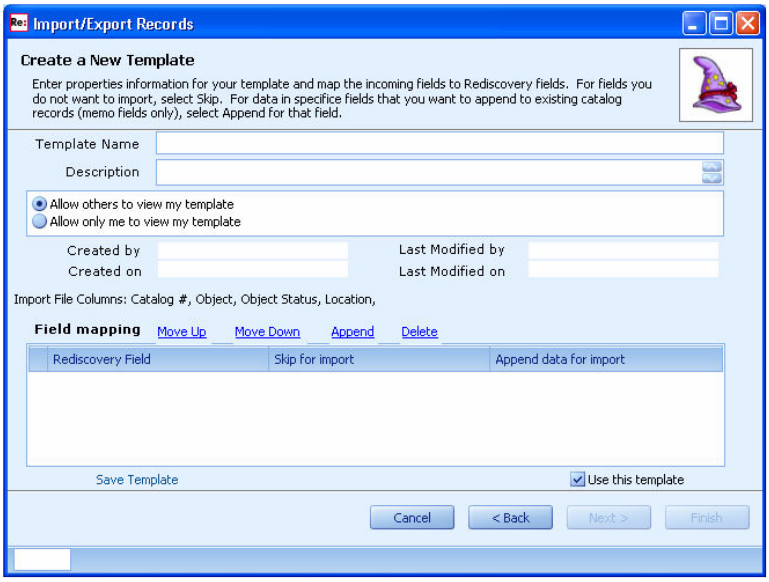
- Choose whether to open an existing template or create a new template and click Next

  Open an existing template – allows you to select or modify a template that has already been created. Templates can be used for both importing and exporting records. It is not necessary to create new templates if the format of the incoming data is the same as a previously imported or exported file.

  Create a New Template – allows you to set up a new template to match the field order of incoming data.

Create a New Template

When you click Next, the Create a New Template page opens. Complete the fields as follows:



Template Name

Enter a name for the template. You must enter a name or you cannot save the template or export records.

Description
Enter a description of the template for your reference. This field is optional.

Allow others to view my template or
Allow only me to view my template
Select whether to allow others to use your template or only you.

Note: Created by, Created on, Last Modified by and Last Modified on are system generated using your user id and current date.

Import File Columns
This shows the labels and order of the fields of the incoming data to aid in adding fields to your template.

Field Mapping
To add fields to the template:

- Click Append. A new line appears in the grid.
- Choose the field name from the pull down menu in the Rediscovery Field column.
- Add all fields necessary to match your incoming data. Each time you click Append a new line appears at the bottom. You can also click Insert to add a field above the field selected in the grid.

Note: Field order is important. The catalog number or main identifying field like Artist name or Loan ID must be the first field in your template as well as your incoming data. The remaining fields in the template must match the order in your incoming data. Use the Move Up, Move Down, Insert and Delete options to arrange the fields in the template to match the incoming data. The Import File Columns listed above the Field mapping is there to assist you with the order of the fields in your incoming data.

You cannot change the field labels in the template. If your incoming data labels do not match the Rediscovery field labels, you must change the incoming data labels before importing.

You can import individual subfields of formatted and repeating formatted memo fields. The subfields are listed with the main field name preceding the subfield name in the field list.

For repeating formatted memos, the data will be inserted into the first grid entry of the repeating formatted memo unless you use the repeating delimiter – space-pipe-pipe (||) – between the terms to divide them into additional grid entries. For example,

Example 1:
Field: Origin: City
Incoming data: " ||Denver ||Fort Collins"
Result:

City	County	State	Country
	Jefferson	CO	USA
Denver	Denver	CO	USA
Fort Collins			

The first grid entry subfield is blank, "Denver" is entered for the second entry's subfield and "Fort Collins" for the third entry's subfield.
Warning: This will blank out the subfield if you do not enter a term. It does not just skip over it.

Example 2:
Field: Origin: City
Incoming data: "Boulder"
Result:

City	County	State	Country
Boulder	Jefferson	CO	USA
Denver	Denver	CO	USA
Fort Collins			

The first grid entry subfield will be "Boulder" leaving the remaining entries alone.

Skip for import
If checked, it will not import this field during the import process. There may be some occasions where the incoming data has fields that you do not want to import, but you must include them in the template as a 'place holder'. Use this option to ignore this field during import.

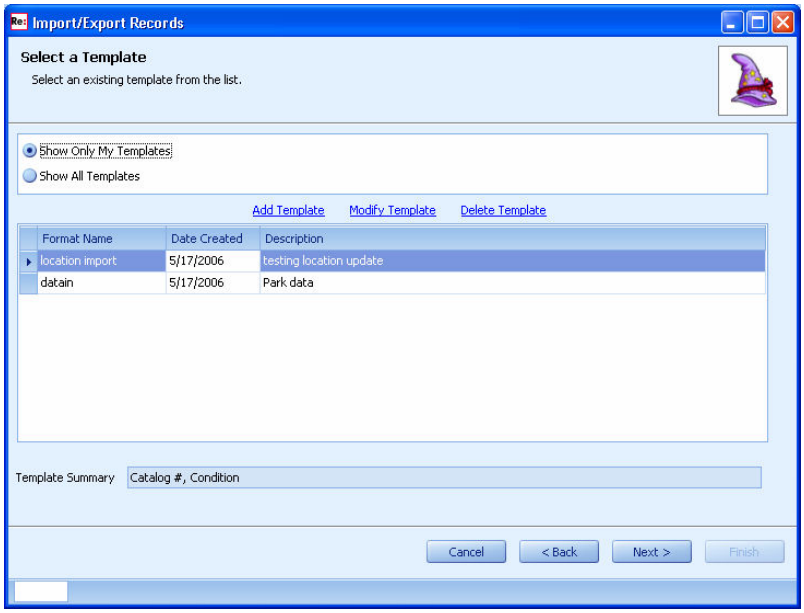
Append data for import
If checked, this option will append the incoming data to the field of a matching record instead of overwriting the data in the current record. This option is only available for memo fields. **Note: Do not use this option for formatted or repeating formatted memo fields.**

Save Template
When finished adding fields, click Save Template. If you do not save the template, when you click Next the system will prompt you to save it.

Use this template
You can create multiple templates that you may want to use later for other data. Uncheck this option if you do not want to use this template for the current data. When you click Next, you can then select or create another template to use instead.

Open an existing template

Select "Open an existing template" on the Select a Template page. The following page will appear when you click Next allowing you to select the template to modify.



Select to show only your templates or all templates by choosing one of these options:

Show Only My Templates – lists only those templates created by you.
Show All Templates – lists all shared templates in the directory.

The list of templates appears in the grid.

Template Summary
This field shows the list of fields that are included in the selected template.

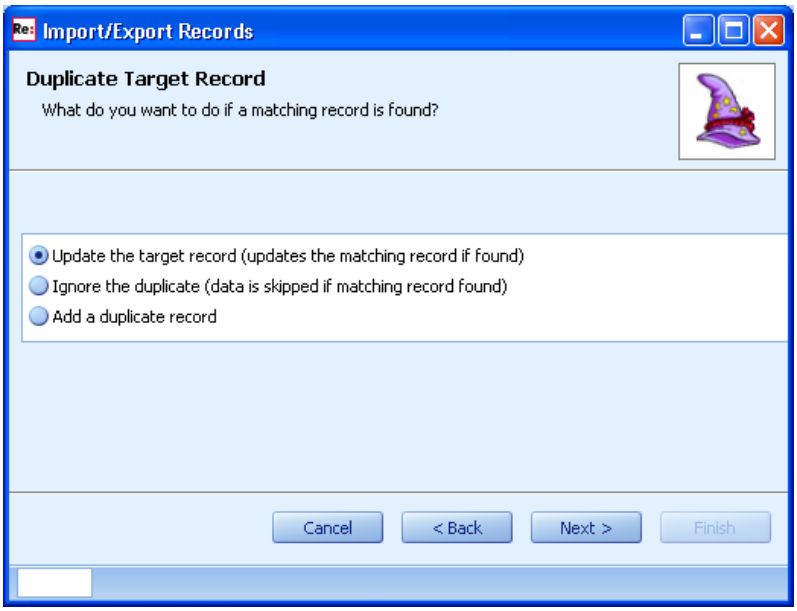
Add Template
You can add new templates from this page by clicking the Add Template option.

Modify Template
This option allows you to modify the selected template to change fields to match your incoming data.

Delete template
This option will permanently delete the selected template.

- Once you have created or modified a template, click Next. If the template you are using does not match the incoming data, you will receive a message that it does not match. Click OK and modify the template to correct the field order or add missing fields, or select or create another template to match.

- If the template matches the incoming data, you will have the following options concerning duplicate records:

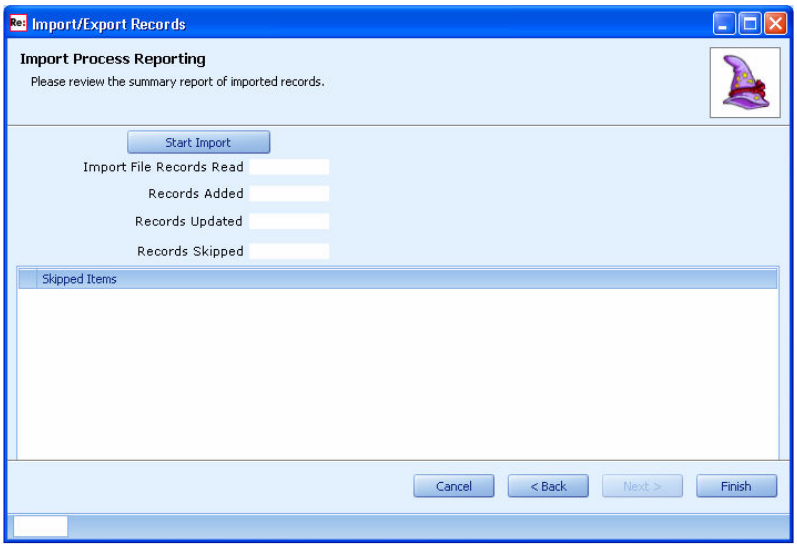


Update the target record
If a matching record is found, the incoming fields will be updated in the record. Any records without a match will be added to the table.

Ignore the duplicate
If a matching record is found, it will be skipped and no fields will be updated for that record. Any records without a match will be added to the table.

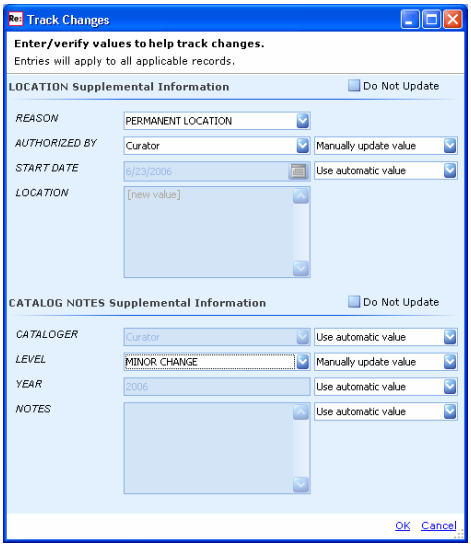
Add a duplicate record
Adds all the incoming data to the table without updating matching records. This option will result in duplicate records if the incoming data has the same main identifying number as a current record.

Select one of these options and click Next.



- Click **Start Import** to begin importing the data.

- You will be prompted to enter Track Changes supplemental information for Catalog Notes and any imported fields that have a history tracking feature such as Location and Condition. Enter the appropriate information and click OK.



Note: These are the only supplementals that will be created during importing. You cannot import data directly into a supplemental record.

- You will get an "are you sure" message – click Yes. When complete, you will get a confirmation message of the number of records imported – click OK. The records imported will be reported as follows:

Import file Records Read
Indicates how many records were identified in the incoming data file.

Records Added
Indicates how many new records were added to the table.

Records Updated
Indicates how many existing catalog records were updated with the incoming fields. Only reported if Update the target record was selected on the previous page.

Records Skipped
Indicates how many incoming records were skipped because the record matched an existing record in the directory. This is only reported if Ignore the duplicate was selected on the previous page.

Skipped Items
If records were skipped during the import because you chose to Ignore the duplicate, a list of these skipped records is shown in this grid.

- Click **Finish** to close the wizard.

V. DATA UPDATES (FORMERLY LAPTOP COPY)

A. Overview

1. *What is the Data Updates function?*

Data Updates (formerly known as Laptop Copy) allows you to create and update records on remote computers where there is not an available network connection. After they have been created or updated on a remote computer, such as a laptop, you can add and update them on your master collection directory.

2. *When will I use the Data Updates function?*

Use the Data Updates function to transfer records to your main collection directory from a remote computer.

For example, you may want to use a laptop to catalog objects in a historic structure or storage facility. You could then use Data Updates to copy the records into your master database.

3. *Do I need special security rights to use Data Updates?*

Yes. You need Administrator security rights to use Data Updates. Refer to Section V of Chapter 9 for information on user security.

B. Using Data Updates

1. *How do I send records from one computer to another using the Data Updates function?*

The update process includes two steps, with an optional third step for permanently removing the records from the remote computer, after they have been copied to the master database.

- send the records to an Update zip file
- load the records from an Update zip file
- delete the records from the remote system directory (optional)

2. *Can I copy subsets of the data from my laptop?*

Yes. The "Send Data to Update Zip File" option allows you to copy the entire directory or a subset of your catalog records. To copy a subset of your catalog records, activate a filter, tag set or highlight multiple records in the List Pane. Refer to Chapter 7 for information on creating tag sets and filters.

Note: For the associated module tables, such as accessions or the other archives levels, all the records are included in the zip file, not just those associated with the selected catalog records.

3. *How do I access the Data Updates function?*

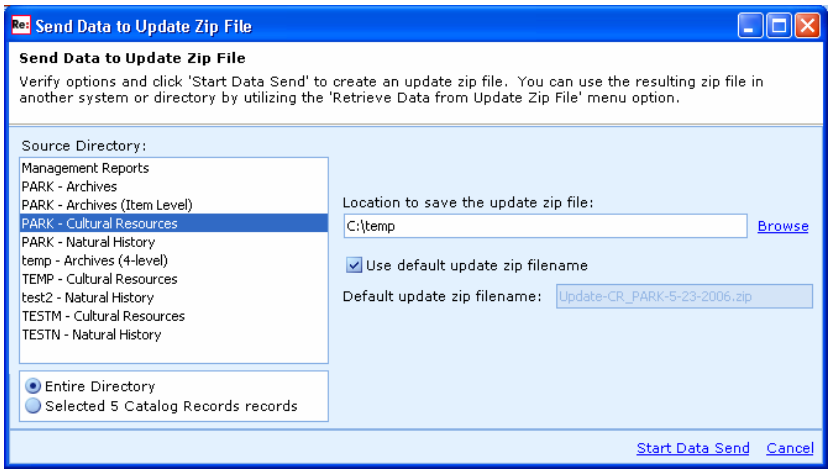
From any catalog screen in Collections or Archives modules, go to the File menu and select Data Updates. You will see the three options in the submenu.

4. *How do I copy records to an update zip file to upload to another system?*

To copy records to an update zip file:

- Go to the directory that contains the records you want to copy. **Note:** If you don't want to send the entire directory, create a filter, activate a tag set or highlight multiple records in the List Pane first.

- Go to the File menu and choose “Data Updates” then “Send Data to Update Zip File”



- Select the directory where your data is located.

- If you have activated a tag set, filter or highlighted records in the List Pane of the current directory, you will have the option to send the Entire Directory or Selected # of Catalog Records. This applies only to the main table (catalog records, or collection, series, file unit or item records in archives.) All associated module data will be sent.

Note: If you choose a different directory from the one you started the Send Data process, you can only send the entire directory.

- Select a location to save the update zip file by typing a path in the Location field or clicking Browse and selecting a location in the Browse for Folder window that appears.

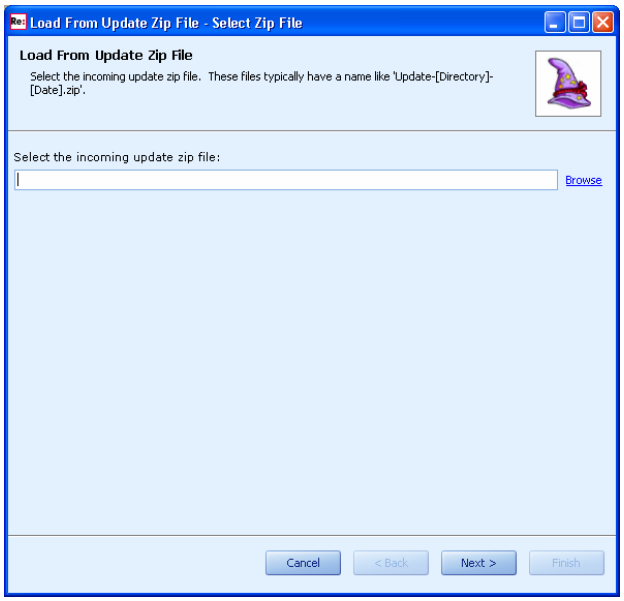
- The “Use default update zip filename” option allows you to change the name of the file if desired. When checked, the file will be named “Update-*directory name-current date.*zip” where *directory name* is the directory you chose and *current date* is today’s date. Uncheck the option to enter a different file name. A new entry line will appear for you to type your own file name.

- Click Start Data Send. You will receive a message that this process could take awhile depending on the amount of data in your directory or selected records. The update file will include all associated module data and images from the directory as well as the catalog data you have selected. You will get a confirmation message when the update file is complete.

5. *How do I copy records from my update zip file to a directory on another computer?*

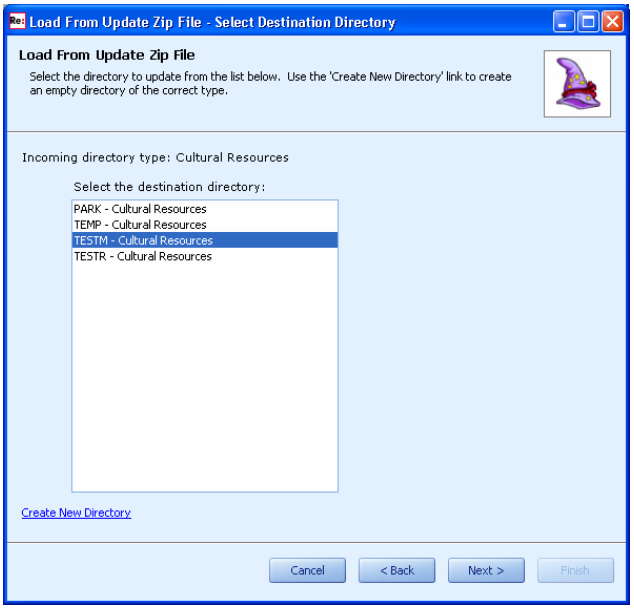
To copy records from an update zip file to a directory:

- Go to any directory on the other computer and from File menu, select “Data Updates” then “Load Data from Update Zip File”.



- Enter the path and filename of the incoming update zip file, or click Browse to locate and select the file. Then click Next.

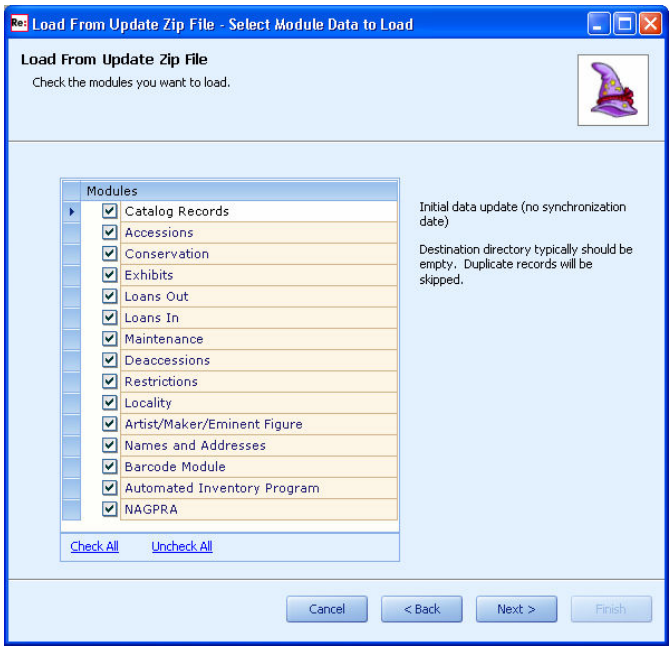
  Example: D:\update-CR_PARK-05-20-2006.zip



- The incoming directory type is displayed with a list of matching directories available in the system. Highlight the directory to load the data. You can load the data directly into your master directory or a temporary directory.

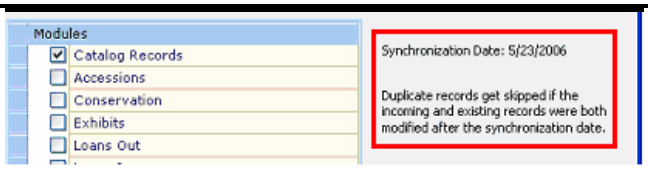
Note: If you want to create a new empty directory to load the data, click "Create New Directory" (see Chapter 9, Section III, for information on creating directories). The new directory will appear in the list for you to select.

- Click Next.



- Since all associated module data is included in the update zip file, you have the opportunity to load any or all of these associated modules at the same time you load the catalog data. Uncheck those associated modules that you do not want to load at this time.

Synchronization Date



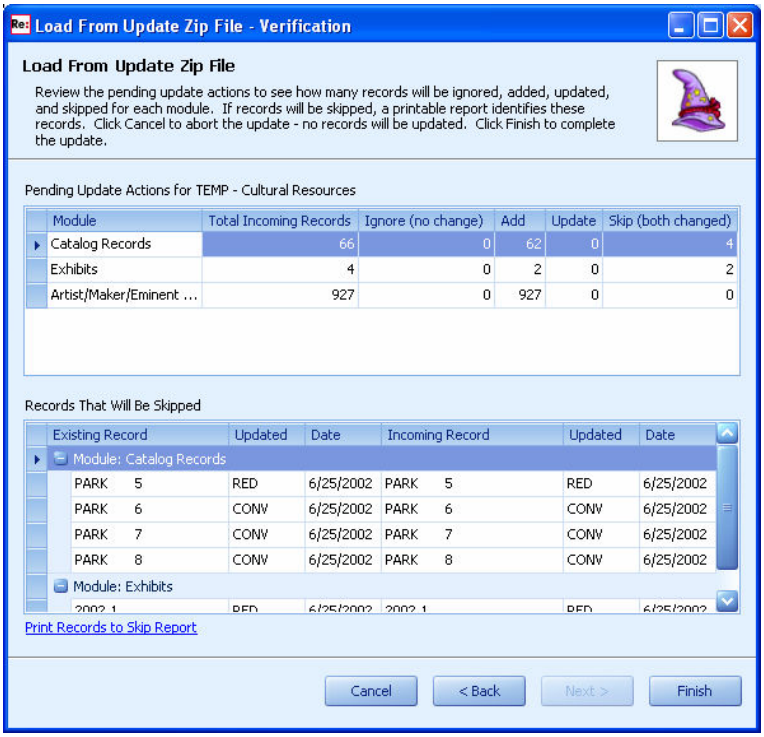
If the destination directory is an empty directory or has not had a Data Update (Send to Update zip) performed, there is no synchronization date recorded. The load function uses this synchronization date to compare duplicate records. If no synchronization date exists, all duplicate records will be skipped to prevent overwriting records that were both modified separately.

If, however, you are updating the master directory with records from an update zip file, the synchronization date will show the last time the data was sent out to the remote system. This means that duplicate records are skipped only if they were <u>both</u> modified after this synchronization date. The system cannot know which record should be the master record and thus leaves the record unchanged. Otherwise, matching records will be updated for any module checked.

- Click Next.

- You will see a message that the update will proceed and cannot be canceled. Depending on how much data is being loaded, this process may take a long time. Click Yes to proceed with the update.

- A report of incoming records shows which submodules were loaded, how many records were contained in the incoming data, how many are ignored, how many are added to the directory, how many are updated, and how many are skipped.



Total Incoming Records – this is the number of records by module found in the zip file that you chose.

Ignore – an incoming record is ignored if a matching record in the directory has the same update date as the incoming record. There is no need to update records that have not changed.

Add – an incoming record will be added to the directory if there is no matching record already present.

Update – an incoming record will update a matching record only if the incoming record was changed AND the existing record was not changed after it was originally sent to the Update zip file. The Synchronization date determines if an existing record was changed after it was sent to the remote computer. **Note**: The date that data was sent to an update file is recorded for that directory. Any changes to the master copy of the record after that date will prevent the record from being updated from the remote computer copy.

Warning: Any records that have images attached on the master computer <u>after</u> they have been sent to a remote computer will lose the image connection when those same records are updated from the remote computer copy. If, however, images are attached to the records prior to sending them to the remote computer, when these records are uploaded back into the master copy, the images will be retained. You can also add images on the remote computer and these will upload to the master system during the update.

Skip (both changed) – indicates the number of records where the update date for both the incoming record and the matching record have changed after the data was sent to the remote computer originally, or this is the initial data upload for this directory and no synchronization will occur. The system will not overwrite records that have changed in both the incoming and destination directories.

- A report of the skipped records is shown with the existing record on the left and the incoming record on the right showing the user name and date for comparison. To print this report, click <u>Print Records to Skip Report</u>.
- Click Finish to complete the update. You will get a confirmation message when the update is complete. Click OK.

6. *How can I get all the records to load into the directory regardless of the date the record was modified?*

If you want all the records in the Update zip file to load, create an empty directory to load them into instead of an existing directory. You can then use the Transfer function to transfer records into your main directory and update them regardless of the date on the incoming or target record. See Section I of this chapter for information about transferring records.

Note: With the transfer function, however, there is no verification process that prevents matching records from being overwritten that have been changed separately in both directories.

7. *When do I use the "Delete Data from Current Directory" option?*

Use the "Delete Data from Current Directory" option to delete all the records from a temporary collection directory.

Do not use this function from your main, or host, directory. Use it only to clear the records from a laptop or remote computer to create an empty directory. Use "Delete Data from Current Directory" only after you have loaded the records into your main computer using "Load from Update Zip File".

8. *How do I use the "Delete Data from Current Directory" option?*

WARNING! WARNING! WARNING!
If you use this function after you upload files into your MAIN collection database, the system will permanently remove your collection records! There is no way to recover them! Do not use this function on your main directory and not on the temporary directory until you have completed the "Send Data to Update Zip File".

To delete records from a temporary directory:

- Go to any catalog record in the directory where you want to remove **all** the collection and associated module records.

- From the File menu, select “Data Updates” then “Delete Data from Current Directory”.

- You will receive a warning message that this process will permanently delete all data from the current directory without possibility of retrieval. If you want to proceed, click Yes.

- You are given one final message with a chance to abort the process. Click Yes to completely delete the data from the directory.

VI. LOAD TO EMPTY DIRECTORY

A. Overview

1. *What is the Load to Empty Directory function?*

Load to Empty Directory lets you load a backup zip file created using one of the Backup Data options (except All databases or Web Catalog transfer) into an empty data directory. Refer to Chapter 9, Tools, for information on Backup Data.

The function will check the destination directory, and prompt you to select another directory if it already has data. This will prevent overwriting existing data. If the backup contains images or multimedia files, these will also be loaded into the system maintaining the links between records and image/media files.

2. *Why would I use the Load to Empty Directory function?*

You will need to use the Load to Empty Directory function if you:

- want to load records from a directory backup onto a stand alone machine such as a laptop
- receive a backup zip file of records from contract catalogers
- receive a backup zip file of records from another park or center

3. *Can I use Load to Empty Directory for any directory type?*

Yes. The Load to Empty Directory works for any kind of directory: Cultural Resources, Natural History, and Archives directories.

4. *Does the Load to Empty Directory include image files?*

Yes. If the backup zip file included images when created, you will have the option in the Load to Empty Directory process to load those image files along with the records.

5. *How do I access the Load to Empty Directory function?*

Load to Empty Directory is located on the File menu.

6. *Do I have to have special security to access this function?*

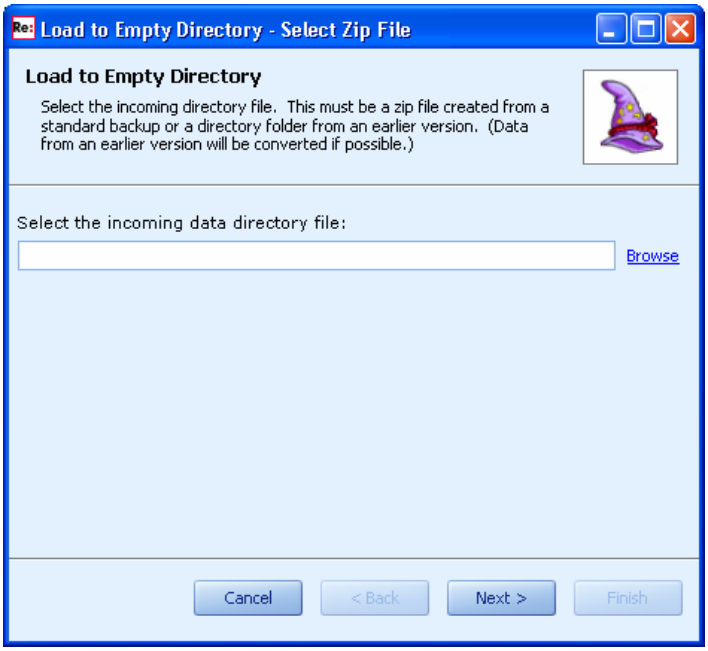
Yes. You must have Administrator rights to use the Load to Empty Directory function. See Chapter 9, Tools, for more information on user security.

B. Load to Empty Directory

1. *How do I load a backup zip file to an empty directory?*

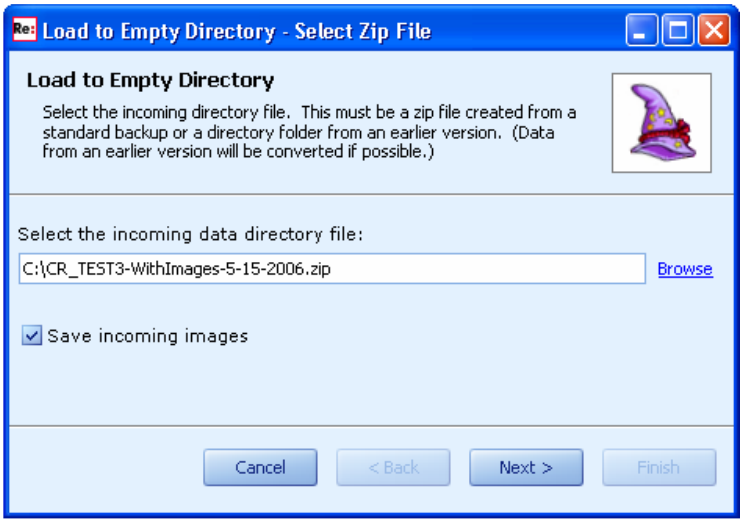
To load a backup zip file to an empty directory:

- Either create a new empty directory of the correct type for the data that will be loaded (e.g., cultural resources, natural history, archives), or identify an empty directory to use for this process. You will also have the opportunity to create a new directory during the loading process. Refer to Chapter 9, Tools, for information on creating new directories.
- Select Load to Empty Directory from the File menu to start the Load to Empty Directory wizard.



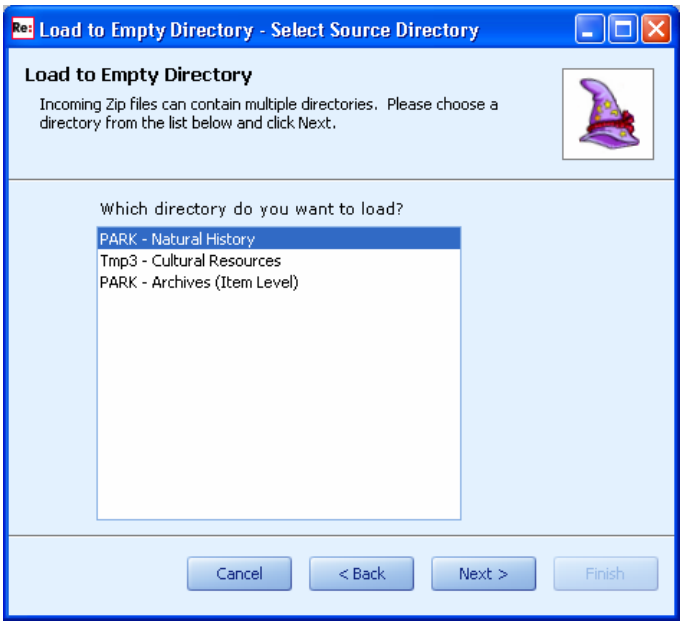
- Click Browse to select the backup zip file to load. Locate and highlight the zip file in the Open dialogue box and click Open.

Note: You can only load backup zip files that were created from Rediscovery's Backup Data function. If the zip file you select is not the correct type, a message will appear indicating that the file is not a backup zip file. You must choose the correct zip file, or use a different process to load the zip file (such as Data Updates or Transfer from Disk depending on the type of zip file).



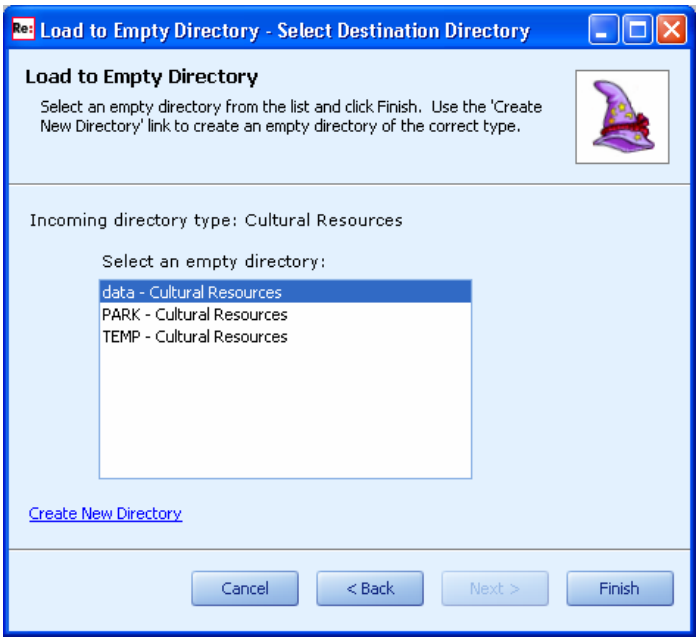
- If images are included in the zip file, you will also have an option to save the images. If you do not want to save the images from the zip file, uncheck the "Save incoming images" option.

- Click Next.



- If your backup zip file contains more than one directory, you need to choose which directory you wish to load. Select the directory from the zip file that you want to load and click Next.

Note: If the zip file contains only one directory, you will not see this window. Skip to the next step.



- Select the destination directory. You will see a list of available directories that match the incoming directory type. Select an empty directory to load the data.

- Click Finish.

- A message will inform you that this process may take a long time without the option to cancel. The length of time depends on how much data you are loading and whether there are images or multimedia files. Click Yes to continue.

- The system will then check to determine if the destination directory is empty. If the destination directory that you selected is not empty, you will receive a message that the data could not be loaded because the destination directory is not empty. Click OK. You should then do one of the following:

  – Select another empty directory from the list, *or*

  – Click Create New Directory to create an empty directory. (See Chapter 9, Tools, for information on creating directories.) After creating the directory, you will see the new directory appear in the list. Select it and click Finish again.

- After the data has finished loading, you will receive a confirmation message that it loaded successfully. Click OK. Your data has now been loaded to the selected directory and is available for use.

If this is data you received from a contract cataloger, other park or center, you will want to review the records and then transfer them to your main directory. Refer to Section I of this chapter for information on transferring records to another directory.

Once the records have been transferred, you can delete this directory. See Chapter 9, Tools, for information on deleting a directory.

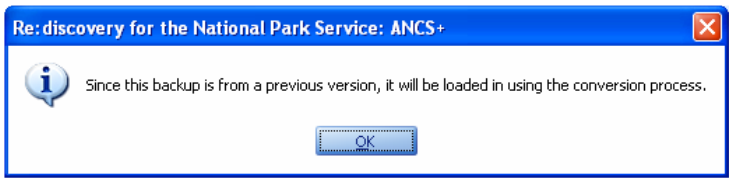
2. *Can I load a #9 or #11 backup zip file from a previous version of ANCS+?*

Yes. You can load a #9 Full Directory backup or #11 Full Directory backup with images zip file created from ANCS+ Version 6.3/6.3.1. The program will prompt you to upgrade the data to the current version.

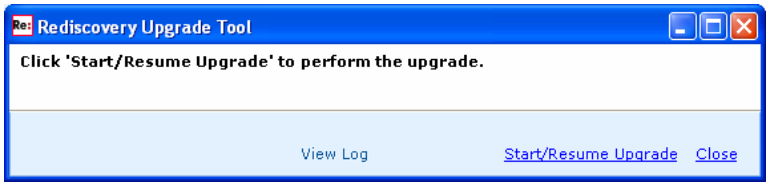
To upgrade the data:

- Follow the steps as in B.1 above.

- When you click OK on the message that the process may take a long time, the backup file will unzip. You will then get the following message that the data is from a previous version and will be converted. Click OK.

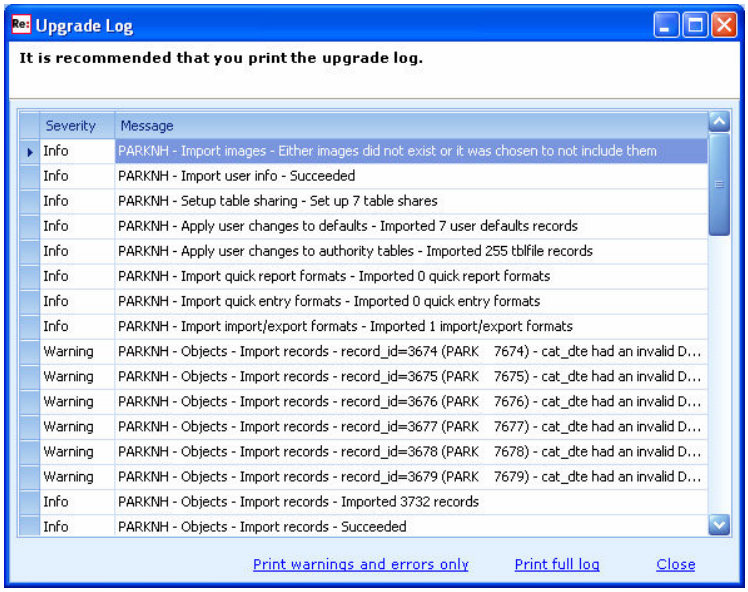


- The Rediscovery Upgrade Tool window will open.



- Click Start/Resume Upgrade to begin the upgrade process.

- When the upgrade is complete, you will get a confirmation message with information about how many warnings and/or errors were found during the upgrade process. Click OK to view the upgrade log.



- The Upgrade Log lists all data upgrades that were processed. It is recommended that you print the log if there are Warnings or Errors listed. Most of these will be a standard part of the upgrade.

Note: For more information on the upgrade process and log, see Appendix B.

- Click Close on the Upgrade Log and Close on the Rediscovery Upgrade Tool windows.

Your data has been converted and is now available for use.