CHAPTER 9: TOOLS

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I. RECLASSIFY AND SWEEP WORDS

A. Overview

1. *What is the purpose of the Reclassify and Sweep Words function?*

The Reclassify and Sweep Words function lets you update the Word Search index for one or more data directories, if needed.

This process updates the list of words that the system uses when you do a word search. The list includes:

- an example of each word used in the database, and
- a reference to every record that contains the word

Note: Word Search will find only words in your data that have been indexed. Numeric and date fields may not be indexed. Many common words are not indexed, such as articles (the, a, and an) and prepositions. See Section C below for words excluded from word search.

2. *How does Reclassify and Sweep update the Word Search list?*

The Reclassify and Sweep process updates the word search list by:

- adding any new words from new or updated records
- removing any words that have been deleted from records
- placing pointers to new word locations
- removing pointers to records for words that have been deleted

Note: Reclassify and Sweep rebuilds the Word Search index for all records in the selected directory. For large amounts of data, it may take some time for the process to finish, depending on the size of your database and the speed of your computer. You may work in other areas of the program while Sweep is running.

3. *Do I need special security rights to run Reclassify and Sweep?*

Yes. You must have Administrator security rights to use the Reclassify and Sweep function. See Section V of this chapter for information on user security.

B. Running Reclassify and Sweep Words

1. *When do I need to run the Reclassify and Sweep function?*

The software automatically maintains the Word Search index for all records. As you add or modify records, the program automatically updates the Word Search index so that searches will be accurate.

After you Add, Modify, or Copy a record and save it, the data you entered is immediately searchable through Quick Search and Advanced Search. Likewise, changes you make using the following functions are also automatically reclassified and immediately available to searches:

- Spell Check
- Mass Supplemental Update
- Modify All Records

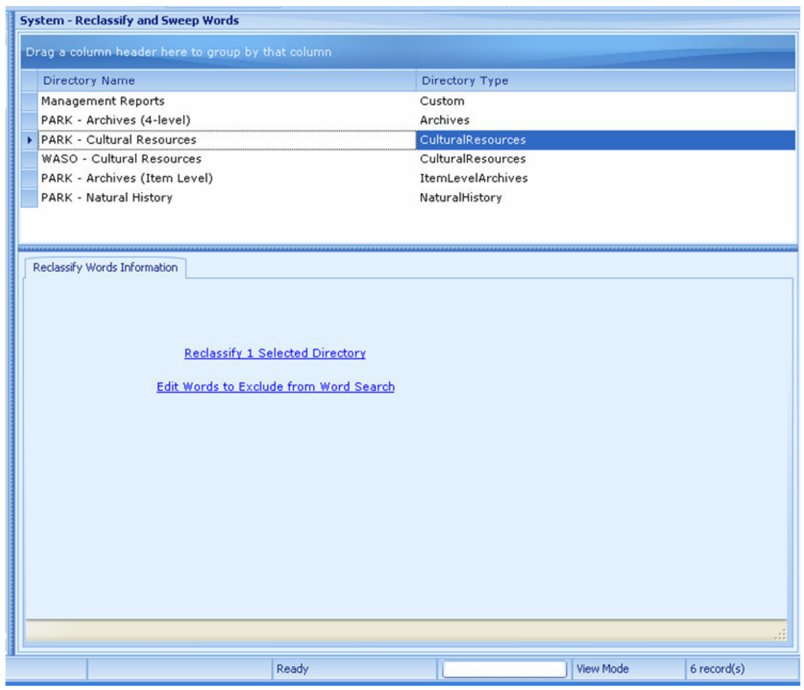
- Global Search & Replace
- Quick Entry
- Import
- Data Updates (formerly Laptop Copy)
- Load to Empty Directory
- Transfer to Another Directory

If a search does not find data that you know is in your database, use Reclassify and Sweep Words to update the Word Search index for the specific directory.

2. *How do I run Reclassify and Sweep Words?*

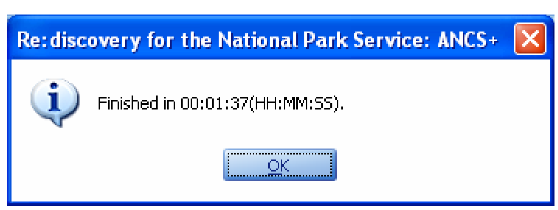
To run Reclassify and Sweep Words:

- From the Tools menu, choose Reclassify and Sweep Words.



- In the List Pane, select the directory you want to sweep. In systems with many data directories, you can select multiple directories by pressing Shift-Up/Down Arrow, Shift-Click or Ctrl-Click. You can select all directories by pressing Ctrl-A.

- Click Reclassify # Selected Directory to start the process on the Reclassified Words Information page. When complete, a message will indicate the process is finished.



- Click OK.

3. *Can I reclassify and sweep a specific group of records?*

Reclassifying a tag set is not yet available in Version 8. When it becomes available in a future update, you will be able to activate a tag set and click Reclassify Tag Set on the Tag Set toolbar.

C. Word Search List

1. *Can I see a list of the words in my Word Search list?*

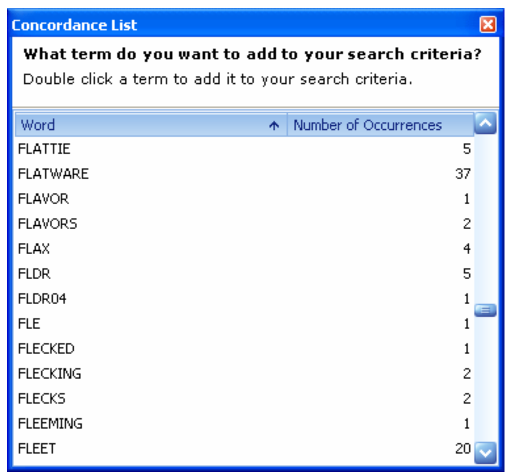
Yes. You can view the list of words that Word Search uses when you access the Advanced Search function.

To access Advanced Search:

- On the button bar, click the Advanced Search button , *or*
- From the Record menu, select Advanced Search, *or*
- Press Alt-8 on your keyboard.

Then in the Advanced Search window:

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



All the words available for Word Search are on this list. If the word you are searching for is not on the list, Word Search cannot find records that match. Run the Reclassify and Sweep Words function if you cannot find words in the list that you are sure are in the database.

2. *Is every word that I enter kept in my Word Search list?*

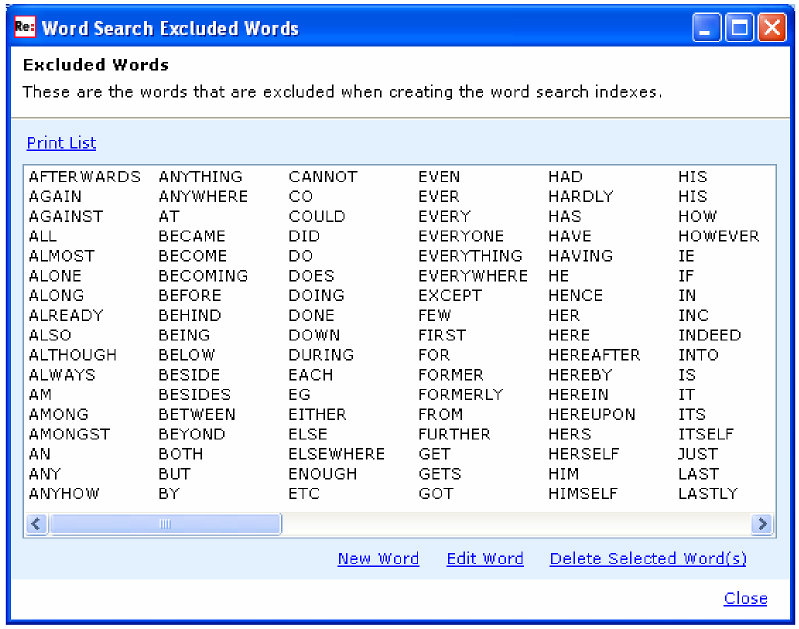
No. Reclassify excludes a number of common words (“a”, “an”, “the”, etc.) and prepositions from the Word Search list.

3. *How can I view the excluded words list?*

You can access the excluded words list from several places:

- Tools menu from any module (select Words to Exclude from Word Search)
- Advanced Search window (select Excluded Words from the Tools menu)
- Reclassify and Sweep Words window

To view the words excluded from Reclassify and Sweep, click Edit Words to Exclude from Word Search.



4. How do I add or delete words 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 Section B above.

5. Can I print the excluded word list?

Yes. Click Print List at the top left of the Excluded Words list window. Then click the printer button in the preview window.

II. BACKUP DATA

A. Overview

1. *Does **ANCS+** include a backup utility?*

Yes. **ANCS+** includes a Backup Data utility. However, if your park already has a reliable backup system, it is recommended that you continue to use it. You must use the Backup Data utility in **ANCS+**:

- if you do not have a reliable backup system in place
- to perform data backups *from within* **ANCS+**
- to provide a backup of your data for your annual submission to WASO and the National Catalog
- to provide data to the NPS Web Catalog (if subscribed)
- to send data to another park or contractor

2. *How does the Backup Data utility work?*

The backup options in **ANCS+** use the SQL server backup function and *SharpZip* library utility to create compressed copies of select data and system files. Use these compressed copies as your backups. The Backup Data utility has 5 options for users to make data backup copies.

3. *Do I need special security rights to use the Backup Data utility?*

Yes. The Backup Data utility is security-protected. You must have Administrator security rights to access this utility. Refer to Section VI of this chapter for information on security.

4. *Why should I back up my **ANCS+** data?*

Make regular backups of your **ANCS+** data to save your information from loss. You also need to make a copy of your data for your annual submissions (catalog records, CMR and ACP) to WASO and the National Catalog.

ANCS+ gives you the increased convenience of performing and tracking your collection documentation and management processes in one central location. Having all your object data and collection management data together also increases the importance of keeping that data safe. You have an obligation to keep the government's records secure. Spend the time it takes to make and store electronic copies of your data.

Your computer and its data are vulnerable in the event of:

- catastrophic natural occurrences such as floods, earthquakes, fires
- power outages or fluctuations
- employee error
- employee sabotage
- theft

5. *How often should I back up my **ANCS+** data?*

If your park does not have a reliable backup system already, make backup copies of your data after long sessions of data entry and editing. You should also back up your data before making major changes like Modify All and Global Search and Replace in case a mistake is made during that process.

6. *Where should I store my **ANCS+** data backup media?*

Store your data in a safe place away from your work area, preferably in another building in a locked, fireproof safe. Make sure that both your computer and its backup data are not vulnerable to the same events at the same time.

7. *How should I back up my **ANCS+** data?*

For WASO and National Catalog Submissions:
Use the Backup Data utility in **ANCS+** to create the compressed file that will be uploaded to the catalog submission ftp site through the internet. You may also wish to write the backup to a CD or other large storage capacity media.

For your protective data backups:
Use the most convenient and efficient backup procedures available.

If your park…	***Then***
has reliable equipment and procedures in place to regularly backup **ANCS+**,	continue to use those.
does *not* have reliable equipment and procedures in place to regularly backup **ANCS+**,	use the Backup Data utility in **ANCS+** and a CD writer or other large capacity storage media.

8. *Why must I use the **ANCS+** Backup Data utility to submit my museum records to WASO and the National Catalog?*

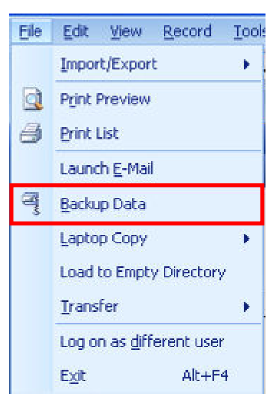
The compressed file format created by **ANCS+** allows the data to be loaded back into another **ANCS+** system (the National Catalog) using a data loading function within the program. This data loading function will only accept backup files created by **ANCS+**.

B. Using the Data Backup

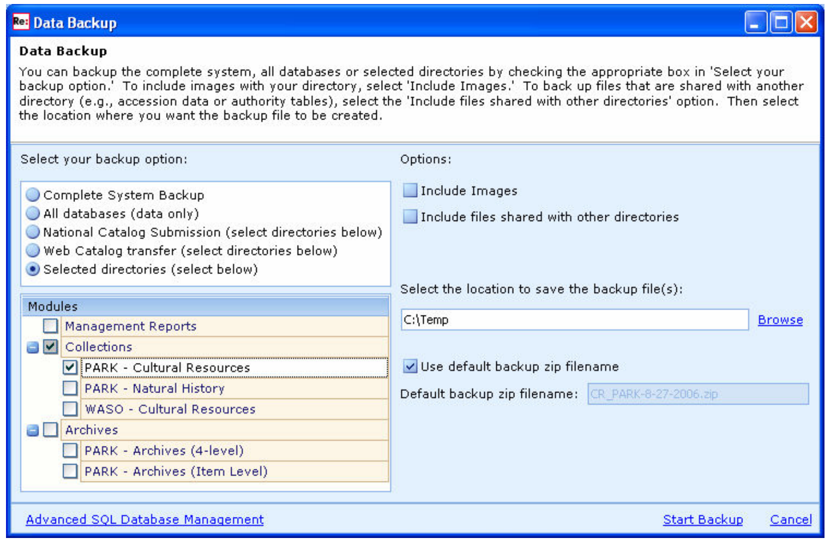
1. *How do I access the Data Backup utility?*

To access the Backup Data utility,

- click on the File menu on the Menu Bar and select Backup Data, or
- press Alt-F and then B on the keyboard.



You will see the Data Backup window:



2. *What are the available backup options?*

The available backup options are:

Backup Name	***Zip File Name Created***
Complete System Backup	CompleteSystem-*{date}*.zip
All databases (data only)	AllData-*{date}*.zip
National Catalog Submission	ACP-*directory*-CatalogSubmission-*{date}*.zip
Web Catalog transfer	*directory*-WebCatalogTransfer-*{date}*.zip
Selected Directories	*directory-{date}*.zip

Note: All zip file names include the date in the name. The options that allow you to select directories will also include the directory names chosen in the filename (e.g., CR_PARK-NH_PARK-8-21-2006.zip)

Include Images

This option, when checked along with one of the main backup options, will include all images associated with the selected directory. This option is automatically included with a Complete System backup and the Web Catalog transfer. You may wish to select it for the All databases or Selected directories backups. It is not available with the National Catalog Submission backup.

Note: The backup file name will reflect this option by including "WithImages" in the file name.

Include files shared with other directories

This option, when checked along with one of the main backup options, will also select other directories that have shared data with the directories you have chosen to backup. This shared data might include:

- accession information
- artist/maker data
- names and addresses
- authority table data

For example, your main Natural History directory shares the accessions information with the Cultural Resources directory. If you are only backing up the Natural History directory, you would not get the accessions information unless you selected this option to include the shared data. This option is automatically included in the Complete System backup and the All databases backup. You may select it for the National Catalog Submission or Selected Directories backups if desired. It is not available with the Web Catalog transfer option.

3. *What are the steps to run a backup?*

The basic steps for running a backup are:

- Select a backup option.
- Select directories if the backup option requires it.
- Select whether to Include Images and/or Include files shared with other directories, if available.
- Select the location to save the backup file.
- Optionally select to name the backup file manually.
- Click Start Backup.

4. *Are there options to restore my data from a backup?*

Yes. Use the Load to Empty Directory utility located on the File menu. See Section VI of Chapter 8 for further information on Load to Empty Directory

5. *How will I be able to distinguish between my backups if they have the same name?*

Notice that in each zip file name the date is included in the file name. This provides an instant reference to the date the backup was made and usually a unique file name (unless the backup was made on the same date as another).

C. Complete System Backup

1. *What is the Complete System Backup option?*

This option includes the entire program, data and images. This option automatically includes images and all shared data.

Note: This is the recommended backup option if you are not using a commercial product specifically designed to backup computer files to protect your entire computer system.

2. *How do I run the Complete System backup option?*

To run the Complete System backup:

- In the Backup Data window, select the Complete System backup option.
- Select the location to save the backup file by typing a path in the location field or clicking Browse to select a location.
- You also have the option to name the zip file with a different name. To do this, uncheck the "Use default backup zip filename". Another field will appear below the Default backup zip filename allowing you to enter an alternate name. **Note**: It is recommended that you use the default backup zip filename so that it is easier to identify the type of backup file that is created.

- Click Start Backup.

- You will receive a warning message that this may take a long time without the option to cancel. Click Yes to proceed with the backup.

- Once the backup has completed, you will receive a confirmation message with the name and location of the zip file. Click OK.

The resulting zip file will be named:
CompleteSystem-*date*.zip

D. All Databases (data only)

1. *What is the All Databases backup option?*

This option includes all databases in all directories. You have the option to include images with this backup by checking Include Images. It creates a backup of the data only for all directories.

2. *How do I run the All Databases backup option?*

To run the All Databases backup option:

- In the Backup Data window, select the All Databases (data only) backup option.

- Select the location to save the backup file by typing a path in the location field or clicking Browse to select a location.

- If you want to include images with your data, check the Include Images option.

- You also have the option to name the zip file with a different name. To do this, uncheck the "Use default backup zip filename". Another field will appear below the Default backup zip filename allowing you to enter an alternate name. **Note**: It is recommended that you use the default backup zip filename so that it is easier to identify the type of backup file that is created.

- Click Start Backup.

- You will receive a warning message that this may take a long time without the option to cancel. Click Yes to proceed with the backup.

- Once the backup has completed, you will receive a confirmation message with the name and location of the zip file. Click OK.

The resulting zip file will be named:
AllData-*date*.zip or
AllData-WithImages-*date*.zip (if you included images)

E. National Catalog Submission

1. *What is the National Catalog Submission backup option?*

This option includes selected directories for your park to submit to the National Catalog as well as your Automated Checklist (ACP) data. You cannot include images with this backup.

2. *How do I prepare my catalog data for annual submission to the National Catalog?*

To prepare data for submission to the National Catalog in Harpers Ferry, WV, you must create:

- tag sets of the catalog data you are submitting for the fiscal year, and
- a zipped backup file of the directory or directories that contain the tag files.

Use the Filter and Tag Set functions to create tag sets of the Cultural Resources and Natural History catalog records you are submitting. You must make a separate tag set for each directory. Name tag sets using the park acronym, Cultural Resources (CR) or Natural History (NH) designator, and two-digit fiscal year.

Example: GETTCR06
GETTNH06

Note: Make sure to remove draft records from the tag sets. Activate a filter or do a word search within the tag set for all records with an object status of Draft Record. Update these records before submission. The National Catalog does not count or print records with an object status of Draft Record. A list of draft records will appear in the report you receive from the National Catalog.

3. *What records do I submit to the National Catalog?*

Submit the records in your park's Natural History and Cultural Resources directories. Include the catalog records that you completed or changed (other than minor modifications) during the previous fiscal year (October 1 – September 30) in tag sets within the directories.

Submit only electronic records. The National Catalog will print archival copies of the records for storage at the National Catalog. At your request, the National Catalog will print blue working copies of the records for the park.

Note: The databases you submit to the National Catalog will be used to run the Collections Management Report (CMR) for your park. They will also include your annual Automated Checklist submission.

Make sure that you complete your ACP before creating the backup files for the National Catalog Submission. Refer to Appendix J for information on completing your ACP.

4. *How do I back up my directories for the National Catalog Submission?*

To back up the directories:

- Choose Backup Data on the File menu.
- In the Backup Data window, select the National Catalog Submission option.
- The Management Reports module (for the ACP) will be checked automatically. Select your catalog record directories under Collections for your catalog submission. These will be the directories with your park acronym followed by Cultural Resources and Natural History. (Check all that apply for your catalog submission).
- Select the location to save the backup file by typing a path in the location field or clicking Browse to select a location.

- "Use default backup zip filename" should be checked.
- Click Start Backup.
- You will receive a warning message that this may take a long time without the option to cancel. Click Yes to proceed with the backup.
- Once the backup has completed, you will receive a confirmation message with the name and location of the zip file. Click OK.

The resulting zip file will be named:

ACP-*Directory*-CatalogSubmission-*date*.zip.

(*Directory* will be the names of the directories you selected – e.g., CR_PARK-NH_PARK.)

Parks submitting only natural history records should also include their Cultural Resources directory. This ensures that the National Catalog receives all related accession records.

5. *When do I submit my catalog records to the National Catalog?*

Submit your catalog records by the national deadline which is currently September 15 of the fiscal year.

6. *How do I submit the records?*

To submit your records:

- Use Windows Explorer or My Computer to locate your backup zip file created in step 4 above. Highlight the zip file. Copy the file using Ctrl-C on the keyboard; or right-click and choose Copy; or choose Copy from the Edit menu. **Note:** You will not see anything happen. The file is copied to the Windows clipboard waiting to be pasted.
- Open your Internet browser (such as Internet Explorer). Type the following address:

  ftp://204.176.104.69/catalogsubmissions/

  Enter the user name: NCSNPS
  Enter the password: NCSNPS!1
  Note: You may see other park zip files at this site.

- Paste your file using Ctrl-V on the keyboard; or right-click and choose Paste; or choose Paste from the Edit menu. You'll see your file copying onto the ftp site. Copying may take several minutes. When it is done, you will see your file on the site. Then close your Internet browser.

For the National Catalog submission, send an e-mail to Carolyn_Moler@nps.gov with the following information:

- park name and acronym
- name of tag file for new and recataloged records
- list of catalog numbers in the tag file (or first and last number)

- request to have blue paper catalog records printed (optional)
- any additional printing requests
- contact name, shipping address, and phone number

For the CMR, send an e-mail to WASO_CMR_Submission@nps.gov with the following information:

- park name and acronym
- total number of research requests from within the park during the fiscal year
- total number of research requests from outside the park during the fiscal year
- any noteworthy accession, deaccession or other noteworthy collections activities during the fiscal year

Do not send submissions by e-mail.

F. Web Catalog Transfer

1. *What is the Web Catalog transfer backup option?*

For parks that subscribe to the NPS web catalog, use this option to backup the collection directories with the data you wish to submit to the web catalog. It will automatically include any images attached to the catalog records.

The resulting zip file will be named:

CR_*Directory*-WebCatalogTransfer-*{date}*.zip

or

NH_*Directory*-WebCatalogTransfer-*{date}*.zip

For information on how to subscribe to the NPS Web Catalog, contact Re:discovery Software Inc. at (434) 975-3256 or support@rediscov.com.

2. *How do I submit only selected records for the Web Catalog?*

To submit only selected records to the Web Catalog:

- Create a new directory to hold only those records for the Web Catalog (see Section III of this chapter for information on creating a new directory).
- Create and activate a tag set of the records in your main directory that you want to submit to the Web Catalog. See Section III of Chapter 7 for information on creating tag sets.
- Select the Transfer Record(s) to Another directory option on the File → Transfer menu.
- Select the directory you created for the Web Catalog records and choose All Visible Items. Then select either Ignore duplicate record if the directory selected is empty, or Update the target record if the directory contains the same catalog records. See Section I of Chapter 8 for more information on transferring records to another directory.
- Click Transfer.

Note: The directory containing the Web Catalog records must have **all** records that you want to appear on the Web Catalog. New records cannot be appended to existing records already appearing on the Web Catalog site.

3. *How do I run the Web Catalog transfer backup option?*

To run the Web Catalog transfer option:

- In the Backup Data window, select the Web Catalog transfer backup option.
- Select the directory you wish to backup. **Note:** You can only backup one directory at a time with this option. The Web Catalog will only accept a single Cultural Resources directory and a single Natural History directory.
- Select the location to save the backup file by typing a path in the location field or clicking Browse to select a location.
- You have the option to name the zip file with a different name. To do this, uncheck the "Use default backup zip filename". Another field will appear below the Default backup zip filename allowing you to enter an alternate name. **Note**: It is recommended that you use the default backup zip filename so that it is easier to identify the type of backup file that is created.
- Click Start Backup.
- You will receive a warning message that this may take a long time without the option to cancel. Click Yes to proceed with the backup.
- Once the backup has completed, you will receive a confirmation message with the name and location of the zip file. Click OK.
- If you are submitting two directories (CR and NH), repeat these steps and select the second directory to back up.

The resulting zip file will be named:
***Directory*-WebCatalogTransfer-WithImages-*date*.zip**

4. *How do I submit my Web Catalog data?*

There are three ways to submit your Web Catalog records after running the Web Catalog transfer:

- Upload the file(s) to the Rediscovery ftp site, *or*
- Send a CD with the Web Catalog transfer zip file(s) on it, *or*
- E-mail the Web Catalog transfer zip file(s) to Rediscovery

To upload the file(s) to the Rediscovery ftp site:

- Use Windows Explorer or My Computer to locate your web catalog transfer zip file(s) created in step 3 above. Highlight the zip file(s). Copy the file(s) using Ctrl-C on the keyboard; or right-click and choose Copy; or choose Copy from the Edit menu. **Note:** You will not see anything happen. The files are copied to the Windows clipboard waiting to be pasted.

- Open your Internet browser (such as Internet Explorer). Type the following address:

  ftp://ftp.rediscov.com/uploads

- Paste your files using Ctrl-V on the keyboard; or right-click and choose Paste; or choose Paste from the Edit menu. You'll see your files copying onto the ftp site. Copying may take several minutes. When it is done, you will see your files on the site. Then close your Internet browser.

To send a CD:

- Write the Web catalog transfer zip file(s) to a CD using your computer's CD writing software.

- Mail the CD to:
  Re:discovery Software Inc.
  Attn: Web Catalog Submission
  3040 Berkmar Dr Suite B1
  Charlottesville, VA 22901

Note: With either submission option above, please send an e-mail to support@rediscov.com indicating that you are submitting records for the Web Catalog and how they are being sent (ftp or CD).

To e-mail the file(s) to Rediscovery:

- If the transfer zip files are of a reasonable size (20 MB or less), you may e-mail them to Rediscovery.

- Open your e-mail program and address a new message to: support@rediscov.com

- Attach the Web Catalog transfer zip file(s) to the e-mail message before sending.

5. *How often can I submit records to the Web Catalog?*

The Web Catalog subscription allows two uploads per year at any time during the year.

6. *Where can I view the Web Catalog data for my park and other parks?*

To view the catalog data posted on the NPS Web Catalog site, in Internet Explorer enter the following address:

http://www.museum.nps.gov

The parks who have data posted are listed alphabetically.

G. Selected Directories

1. *What is the Selected Directories backup option?*

This option includes all data with supplemental and associated module data from any directories selected. You can select multiple directories to back up at the same time. They will be contained in the same zip file.

Note: This option is highly recommended before you perform any mass modification functions such as Modify All and Global Search & Replace just in case you need to revert back to the original data.

2. *How do I run the Selected Directories backup option?*

To run the Selected Directories backup option:

- In the Backup Data window, select the Selected Directories backup option.
- Check the directory you wish to back up. You can check as many directories as desired. They will all be contained in the same zip file.
- You can choose Include Images if you want to back up the images with the selected directories.
- You can choose to Include files shared with other directories. **Note:** This will include other directories in the backup that contain the shared files.
- Select the location to save the backup file by typing a path in the location field or clicking Browse to select a location.
- You have the option to name the zip file with a different name. To do this, uncheck the "Use default backup zip filename". Another field will appear below the Default backup zip filename allowing you to enter an alternate name. **Note**: It is recommended that you use the default backup zip filename so that it is easier to identify the type of backup file that is created.
- Click Start Backup.
- You will receive a warning message that this may take a long time without the option to cancel. Click Yes to proceed with the backup.
- Once the backup has completed, you will receive a confirmation message with the name and location of the zip file. Click OK.

The resulting zip file will be named:

***Directory-date*.zip**

(*Directory* will be the names of the directories you selected – e.g., CR_PARK-NH_PARK.)

H. Advanced SQL Database Management

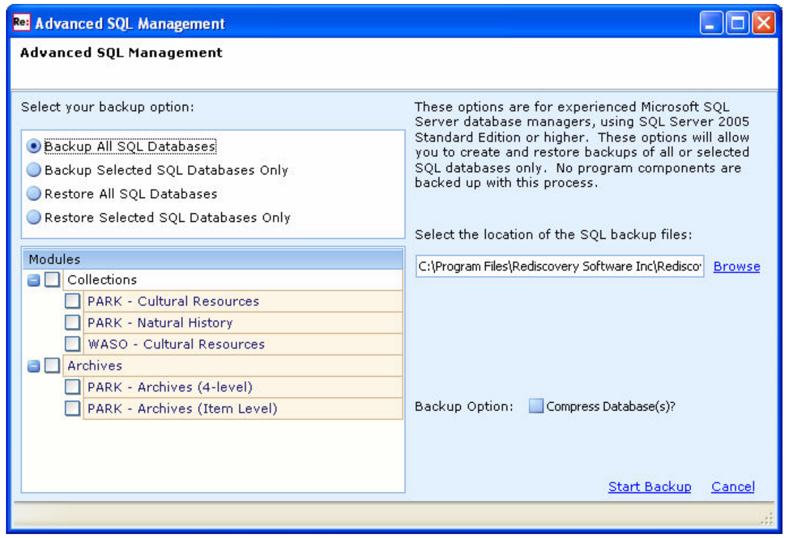
1. *What is the Advanced SQL Database Management option?*

These backup options are for experienced Microsoft SQL Server database managers, using SQL Server 2005 Standard Edition or higher. These options will allow you to create and restore backups of all or selected SQL databases only. No program components are backed up with this process.

Do not use these backup options unless you are experienced with Microsoft SQL Server and are using SQL Server 2005 Standard Edition or higher.

2. *How do I access the Advanced SQL Database Management options?*

To access the Advanced SQL Database management options, click on the Advanced SQL Database Management link at the bottom of the Backup Data window.



3. *What options are available?*

The following backup and restore options are available in the Advanced SQL Management window.

Backup All SQL Databases

This option creates a SQL backup of all databases within the program.

Backup Selected SQL Databases Only

This option allows you to select the modules and/or individual directories from the list below. This creates a SQL backup of only those directory databases selected.

Restore All SQL Databases

If you have made a backup of all the SQL databases using the first option, use this option to restore those databases. You must select the location where these backup files are saved.

Warning: This will overwrite the existing databases with those in the backup.

Restore Selected SQL Databases Only

If you have made a backup of any directory databases using the second backup option, select the directories you wish to restore. You must select the location where these backup files are saved.

Warning: This will overwrite the existing databases selected with those in the backup.

Location

You can select the location where to save the SQL databases by entering a path in the Select the Location field or clicking Browse to select the location.

Compress Database(s)?

You can choose to compress the database(s) during backup, if desired, by checking this box.

Click Start Backup or Start Restore depending on the option chosen.

III. CREATE NEW DIRECTORY

A. Overview

1. *What is the Create New Directory function?*

The Create New Directory utility creates new Cultural Resources and/or Natural History directories in the Collections Management Module. It also creates Archival/Manuscript Collections directories and optional Archives Item Level directories for the Archives Module.

For each directory it creates, the Create New Directory function:

- creates all data tables
- creates associated modules
- sets up all supplementals

2. *Do I need special security rights to create a new directory?*

Yes. The Create New Directory function is security protected. You must have Administrator security access to use this utility. Refer to Section V of this chapter for information on security.

3. *When would I use the Create New Directory function?*

Use this function any time that you need to add a directory.

4. *Why would I need to add a directory?*

There are several reasons that you might need to add a directory. You may:

- wish to create a "working directory" for catalogers to enter and store catalog records until the records have been approved. After the records have been approved, you can transfer them to your master database.
- acquire a collection that you are going to manage separately. You will then need to create a new directory (either natural history or cultural resources) for this new collection.
- want to use an extra directory as a "holding directory" when you are using such functions as Import/Export, Load to Empty Directory, Transfer Record(s) from Disk, and Data Updates (Laptop copy). Using a holding directory when you move groups of records will reduce the possibility of harming your master database.
- take over collection management responsibility for another park's museum collection. You will then need to add directories for that park's records to your system.

B. Creating a New Directory

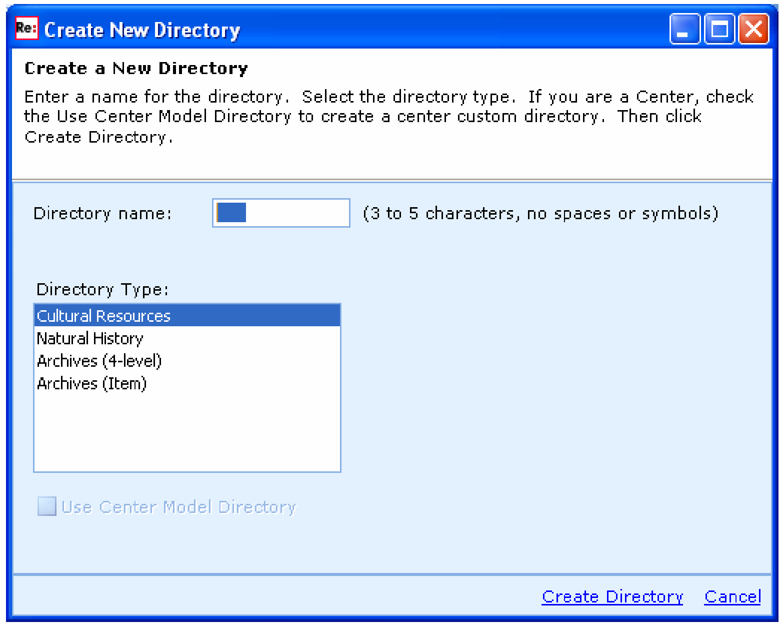
1. *How do I access the Create New Directory function?*

To access the Create New Directory function:

- Go to the Tools menu.
- Select Create New Directory.

Note: Your login name must have the correct security rights to access the Create New Directory function. If you do not have the correct security rights, the Create New Directory option will be grayed-out.

You will see the Create New Directory screen.



You can also access the Create New Directory screen while performing several other functions that load or transfer data. For example, there is a Create New Directory link on the following function windows:

- Transfer Records from Disk
- Load to Empty Directory
- Load Data from Update Zip file (on the Data Updates menu)

2. *How do I create a new directory?*

Follow these steps to create a new directory:

- Enter the name of the directory. This is the name that will appear in the Navigation Pane.

  Park Collections
  Enter the four-letter park acronym in the form of "AAAA." If the park collection has a modifier, enter a collection designation in the form of a letter, for example, A, B, C. Do not enter a space or symbol between the park acronym and the modifier.

  Holding or Working Directories
  Enter 3 to 5 characters. Do not enter any spaces or symbols. Use a combination of characters that will be meaningful to you. You may want to use the cataloger's name or even the words "HOLD" or "TEMP."

Do not enter the type of collection (CR or NH) in the name. The program will supply that automatically once the directory is created.

- Highlight the type of directory you wish to create. Directory types appear in the Directory Type box.

- Click Create Directory after selecting your options.

- You will be asked if you are sure you want to create the directory. Click Yes to proceed with the directory creation.

- A confirmation notice that the directory was created successfully appears. Click OK. The directory is now available for use.

3. *What is the Use Center Model Directory option?*

The Use Center Model Directory option allows you to create directories using center customizations that have been created for Cultural Resources and Natural History directory types. To use, select either the Cultural Resources or Natural History directory type, check the Use Center Model Directory and select the Center Model Type you wish to recreate from the box that appears on the right. There are 4 center models for Cultural Resources and 1 center model for Natural History.

Note: This option may be grayed out in your system if no center model directories exist to create.

IV. DELETE A DIRECTORY

A. Overview

1. *What is the Delete a Directory function?*

The Delete a Directory function removes unneeded directories from **ANCS+**.

2. *What kind of directories can I delete?*

You can delete the following types of directories:

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

When you delete a directory, you also delete all the associated modules and supplemental records for that directory.

3. *Do I need special security rights to delete a directory?*

Yes. The Delete a Directory function is security protected. You must have Administrator security rights to access this function. Refer to Section V of this chapter for information on security.

4. *When would I use the Delete a Directory function?*

Use this function if you:

- make a mistake in naming a directory and need to delete it before you enter any data.
- make a directory to temporarily hold records being imported or transferred into your master directory and no longer need it
- need to remove an **ANCS+** directory for any reason

B. Deleting a Directory

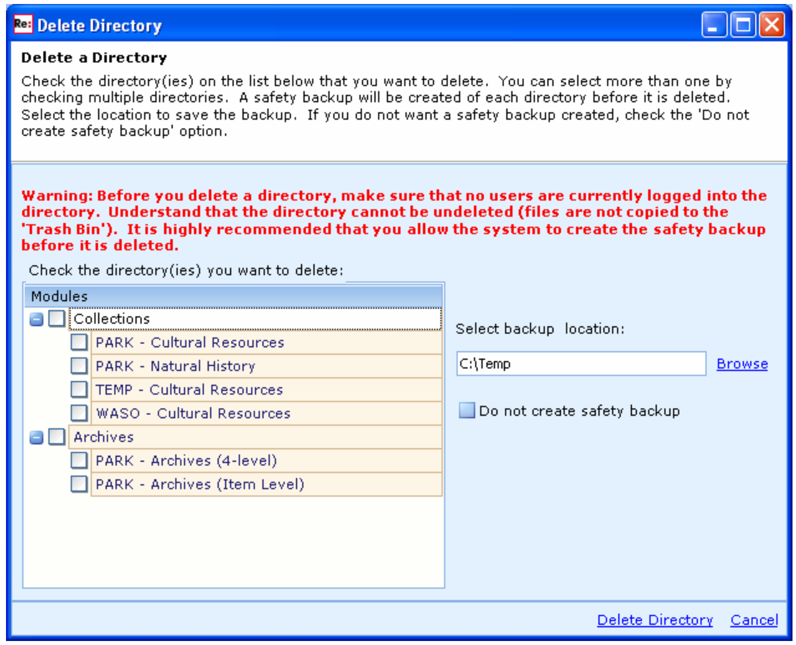
1. *How do I access the Delete a Directory function?*

To access the Delete a Directory function:

- Go to the Tools menu.
- Select Delete a Directory.

Note: If the Delete a Directory option is grayed out, your login name does not have the correct security rights to access this function.

You will see the Delete Directory screen.



Delete Directory Warnings:

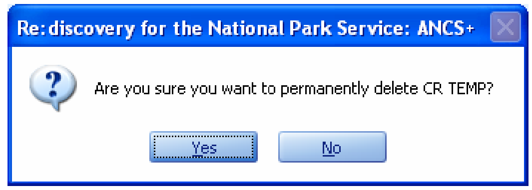
- ***Before you delete a directory, make sure that no users are currently logged into the directory.***
- ***Understand that the directory cannot be undeleted (files are not copied to the 'Trash Bin').***
- ***It is highly recommended that you allow the system to create the safety backup before deleting the directory.***

2. *How do I delete a directory?*

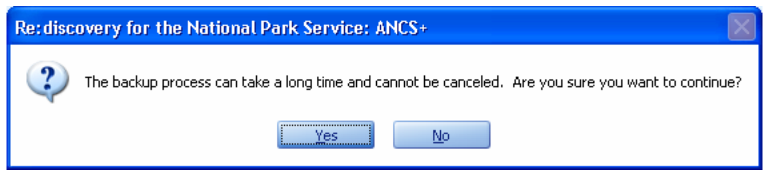
Follow these steps to delete a directory:

Note: To exit the Delete a Directory screen without deleting a directory, click Cancel.

- Select the directory that you want to delete by checking the box in front of the directory name. You can select more than one directory by checking multiple boxes or an entire module (**Be Careful!**).
- Select a backup location by either typing a path in the **Select backup location** field or clicking Browse to select a location to save the backup zip file. It is highly recommended that you allow the system to create a backup of the directories that you are deleting. However, if you do not want to create a backup file, check the **Do not create safety backup** option.
- Click Delete Directory at the bottom right.
- You will be asked if you are sure you want to delete the selected directories. Click Yes to proceed with the deletion.

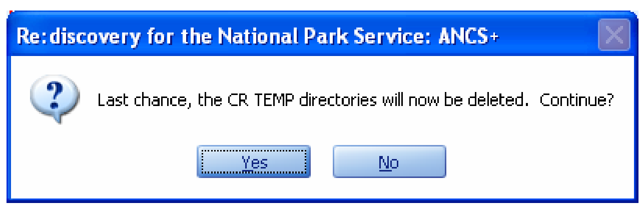


If you choose…	*Then…*
to create a safety backup	another warning appears that the backup process may take a long time depending on the amount of data in the directory. This process cannot be canceled once it has begun. Click Yes to proceed with the backup.

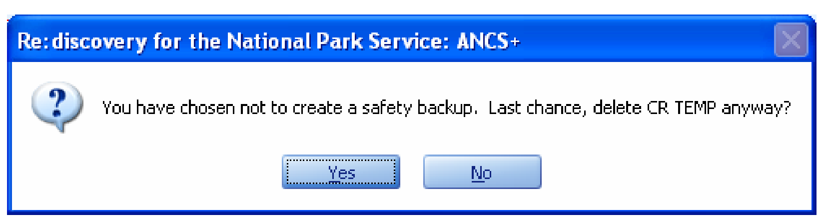


Note: You will see the backup process begin and a confirmation message that the backup was completed successfully. Click OK to continue with the deletion.

After the safety backup is created, a final warning message appears giving you one last chance to cancel the deletion. Click Yes to permanently delete the selected directories. Click No to cancel the deletion process.

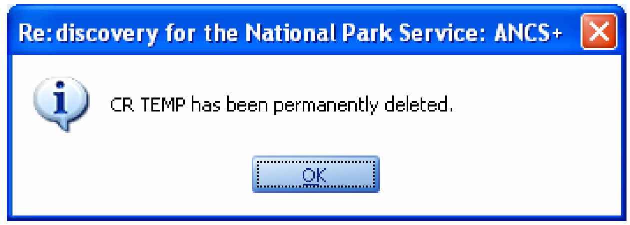


If you choose…	*Then…*
not to create a safety backup	a different message appears indicating your choice not to create the backup.



This is your last chance to cancel the directory deletion if you are not creating a safety backup. Click Yes to permanently delete the selected directories without making any backup. Click No to cancel the deletion process.

- A confirmation message appears indicating that the directory has been deleted. Click OK.



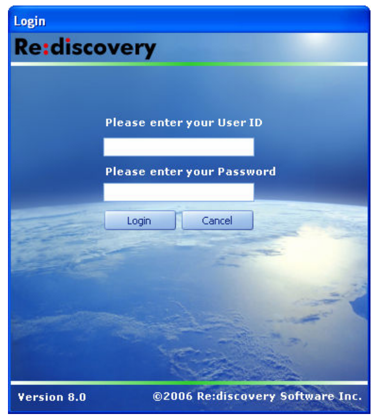
Note: The Delete Directory window will close automatically.

V. USER SECURITY

A. Overview

1. *Does **ANCS+** include a security system?*

Yes. You must have a user login name (User ID) and password to use **ANCS+**. You enter your login name and password on the Login screen to access **ANCS+**. The system administrator can determine which users are allowed to add and edit catalog data, print reports, make mass changes to the data, delete records, use the Tools menu, and assign new users to the system. You can assign system-wide security rights or limit security rights to a particular directory.



2. *What is a User ID?*

Your User ID identifies you as a registered user of the ANCS+ system. Associate your User ID with your real name.

Note: User IDs become part of the museum record. Your User ID is attached to records that you enter or modify. It also appears in some supplemental records that track changes in records. Avoid using inappropriate or “cute” names.

3. *What is a password?*

Your **ANCS+** password protects your login name from use by others. Use it when you enter the system. Your password is linked to your User ID. Keep your **ANCS+** password secure. Don’t share your **ANCS+** password with others. Do not allow other people to enter the system with your User ID and password. Any changes made with your User ID are your responsibility.

4. *Where do I get a User ID and password?*

Your **ANCS+** system administrator or whoever installs and configures your **ANCS+** program, assigns a User ID and password to you. The same person probably assigns security rights.

5. *What are user security rights?*

User security rights determine which:

- functions and tools you can use
- portions of the program you can access

6. *What do I need to assign User IDs, passwords, and security rights?*

You must have Administrator security rights to assign User IDs, passwords and security rights.

7. *How do I assign User IDs and passwords?*

The User Security option is available on the Tools menu. Use it to assign User IDs, passwords, and security rights.

Note: See Appendix B: Installation and Setup for information about a general User ID and a general password to use during installation and first-time use.

8. *Can I print a report of all User IDs in my system?*

Yes. The User Security Profile Report will print the security rights assigned to each User ID in the system. See Section G below for more information.

9. *Can I view the user activity in my system?*

Yes. You can view the user activity in your system by using the Manage User Log option on the Tools menu. See Section H below for more information.

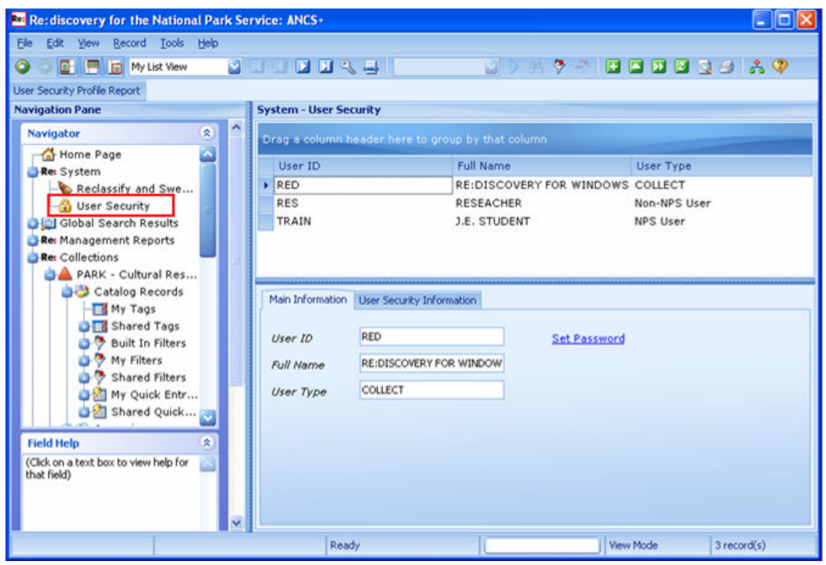
B. User Security

1. *How do I access the User Security*

To access the User Security:

- Choose User Security on the Tools menu, *or*
- Select User Security under System in the Navigation Pane.

You will see the list of users in the List Pane and the first user in the Record Pane.



Note: From the User Security screen, you may add a new user, delete a user, or edit a user's security profile. If you do not have administrator rights, your own security profile will be the only one displayed and you will not be able to edit it.

2. *How do I view the security information for a user?*

To view the security information for a user, first select that user in the List Pane. That user's profile appears in the Record Pane.

3. *What user information is available on the Main Information tab?*

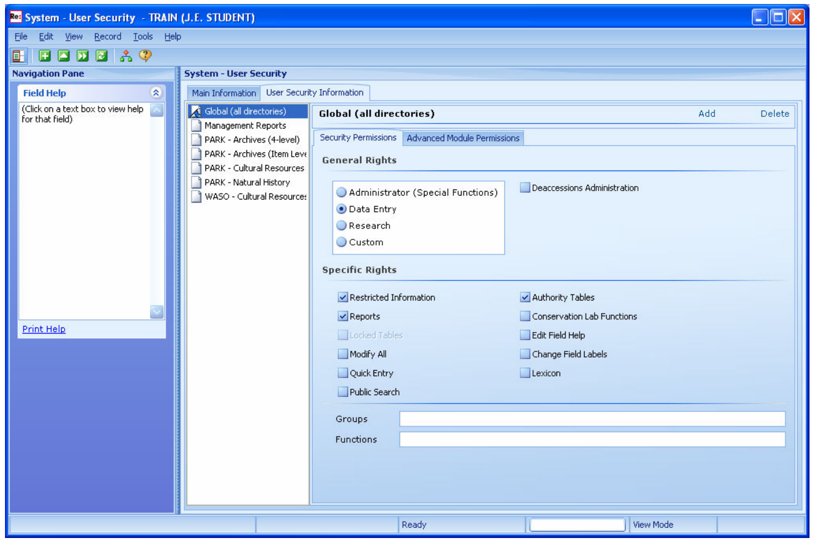
The Main Information tab contains the User ID, the Full Name of the user and the User Type. It also has the link to set the password for a user.

4. *How do I go to the User Security Information tab?*

To move to the User Security Information tab for the current user:

- Click on the User Security Information tab, *or*

- Press Ctrl-N (next) to go to the User Security Information tab.



5. *What information is available on the User Security Information tab?*

The User Security Information tab includes the General and Specific Rights assigned to the user. You can also access the Advanced Module Permissions from this tab.

6. *What are the General Rights available and what do they allow me to do?*

General Rights are cumulative. If you have Data Entry rights, you also have access to all functions available to Research. If you have Administrator rights, you have access to all functions available to Data Entry and Research.

General Right	***A user with this right can access:***
Administrator (Special Functions)	Automated Inventory Program Collections Management Report Backup Data Create New Directory Delete a Directory Import/Export Data Updates (laptop copy) Load to Empty Directory Transfer Delete Multiple Records Mass Supplemental Update Modify All Records Global Search & Replace Quick Entry Pre-allocate Records Reports Lexicon (for editing) Reclassify & Sweep Words Words to Exclude from Word Search (for editing) User Security Manage User Log System Options Field Properties Public Search Configuration Table Sharing Configuration Export MARC record (archives)

Data Entry	Add New Record Copy This Record Modify This Record Delete This Record Defaults & Carry Over Fields Macros Images (Import/Copy/Delete) Multimedia (to edit) Finding Aid/SGML (Archives) Spell Check Image Conversion Autosave Create MARC record (Archives)
Research	Image Zoom/Print/Properties (to view) Image(s) View Multimedia (to view) Show Images in List Pane Show only Records with Images Update My List View Use Large Data Navigator Use Hierarchical Ranges (archives) View Hierarchical Browse (archives) Sort First/Previous/Next/Last Find Record Get Advanced Search Advanced Filter Deactivate Filter Tag Functions Global Search Results
Custom	Use this option to add or remove rights for certain functions or areas of the system. For example, you may want a user to have data entry rights in the catalog records only plus access to the Reports. This allows you to limit or expand a general right in certain areas.
Deaccession Administration	This option allows the user to Approve deaccessions.

All other functions in the program are available to all users with the exception of users who have Public Search rights only.

Note: The Administrator rights allows users the greatest flexibility. Users can make mass changes to records easily. However, the Administrator rights also makes it very easy for the user to make mistakes on a large scale.

> ***No user should routinely work in an ANCS+ master database with Administrator rights. You can add specific rights to a user when needed for specific work (see below). Delete the right when the work is completed. Users with Administrator rights should have a second User ID and password that allows them to work in the system without full security rights.***

7. *What are the Specific Rights available and what do they allow me to do?*

Use Specific Rights to augment a general right. For example, you may want to allow access to Reports and Modify All for a Data Entry user.

Specific Right	*A user with this right can:*
Restricted Information	add/edit/view Appraisal Supplementals
Reports	create/run/modify Quick Reports Run/modify Rediscovery Reports
Modify All	access Modify All Records access Global Search & Replace access Mass Supplemental Update
Quick Entry	edit records with Quick Entry
Public Search	access Public Search
Authority Tables	add/modify/delete entries in authority tables
Conservation Lab Functions	currently not in use
Edit Field Help	edit field specific help text on Park page
Change Field Labels	change User field properties on Park page
Lexicon	add/modify/delete terms in the Lexicon

8. *What are Groups and Functions?*

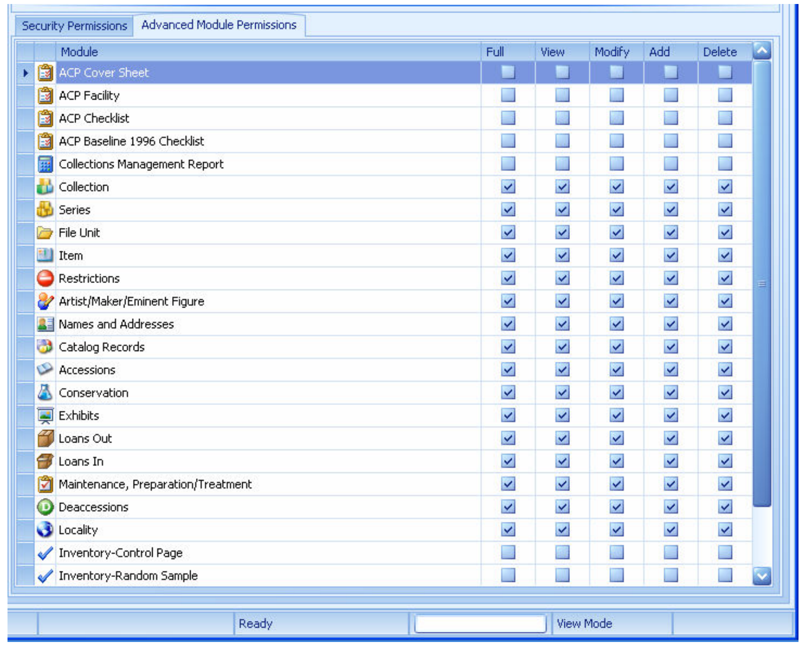
The Groups and Functions fields are used to further define specific security rights for a user. The Groups field functionality is currently not used in **ANCS+** and should be left blank. The Functions field is automatically filled in when individual Specific Rights are selected. You cannot edit this field.

9. *What is the Advanced Module Permissions tab?*

The Advanced Module Permissions tab allows you to further refine a user profile. You can limit access to specific modules and associated modules by checking the security option for each individually.

For example, if you want to exclude access to your accessions information for a particular user, uncheck all options in the Advanced Module Permissions for Accessions for that user.

Or, if you want to allow a user to only view Names and Addresses information, check the View option only for Names and Addresses in Advanced Module Permissions for that user.



The security options are:

Full	Grants view, modify, add and delete rights to the selected module or associated module
View	View data and associated supplemental data with the exception of Appraisal Supplementals
Modify	All the rights of View plus the ability to modify records, add/modify supplemental records, add images to records.
Add	All the rights of Modify plus the ability to add new records.
Delete	All the rights of View plus the ability to delete a single record.

C. Adding a User

1. *How do I add a new user?*

Follow these steps to add a new user:

- Select User Security under System in the Navigation Pane.
- Click the Add button on the button bar, *or*
- Select Add New Record from the Edit menu, *or*
- Press F9.

A new window will open for you to enter a new user. Follow the field-by-field instructions for completing the fields on the Main Information tab of the User Security record.

Note: There is no on-line screen help for these fields.

User ID

Enter a unique user login name for the new user.

User IDs can be no longer than 6 characters (alphanumeric only except the underscore symbol). Do not use spaces in your User ID

Parks may want to establish a system for creating User IDs, such as the user's initials and numbers in a sequential order.

Example: FAH123
RPM124

Full Name

Enter the full name of the new user.

Names can be a combination of characters and numerals. You can enter spaces between the parts of the name.

Example: Susan R. Sarna
J. Edward Jones, Jr.

User Type

Enter the type of user.

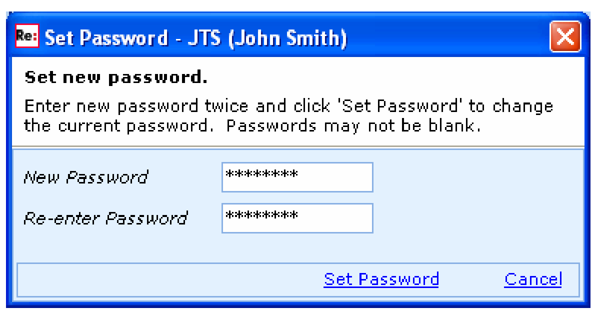
Enter "NPS User" for an employee of the National Park Service.

Enter "Non-NPS User" for the following types:

- an employee of a cooperating association
- cataloging contractor
- outside researcher
- NPS volunteer

Set Password

Click on the Set Password link to assign the password for the user.



- Enter a password in the New Password field. This is limited to 50 alphanumeric characters or symbols. Do not use spaces.

- Then enter the same password again in the Re-enter Password field to confirm.

- Then click Set Password.

2. *How do I assign security rights on the User Security Information tab?*

Click on the User Security Information tab or press Ctrl-N to access the page and assign the desired security rights for this user. This will add the user's Global security permissions.

Note: To assign specific permissions within directories, you will have to save the profile first, then modify it. See Section E below. Individual directories will inherit the global security rights, unless specific directory-level security rights are assigned.

Choose the General, Specific and Advanced Module Permissions (if desired) security rights for the new user. Refer to sections B.5, B.6 and B.7 for a list of security rights and the functions available with each.

Note: If you want to use the default permissions for a general right, you only need to select the general right. Specific rights and Advanced Module Permissions are optional.

To choose a specific security right, make sure that there is a check in the box before the security right you wish to select. If there is not a check in the box, then click on the box and one will appear.

To remove a specific security right, make sure that there is not a check in the box before the security right you wish to remove from the user. If there is a check in the box, then click on the box and the check will disappear.

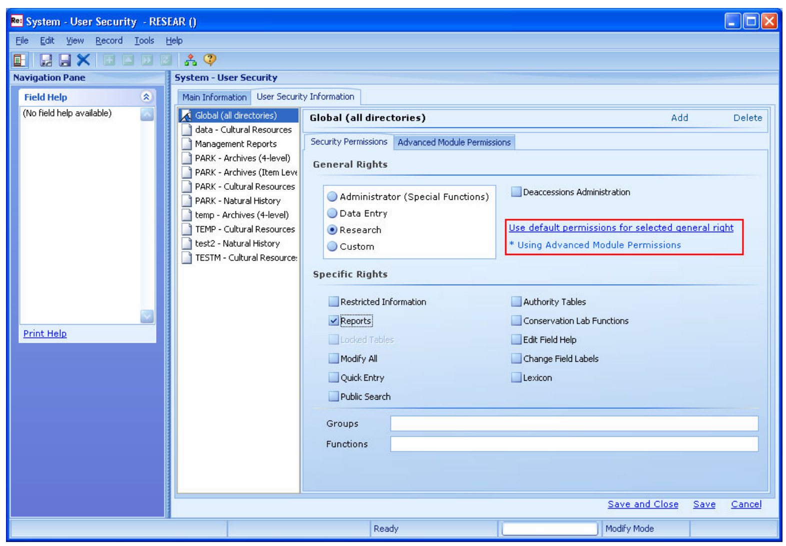
Choose only the rights that each user needs.

Groups

Leave this field blank. The Groups field is not presently used in **ANCS+**.

Functions

Notice that as you select specific rights, this field will be populated. You cannot add to or edit this field.



3. *What is the "Use default permissions for selected general right" option?*

Click this option to restore the default permissions for the selected option under General Rights. This is useful when you change the rights for a user so that all specific rights that may have been assigned previously are cleared and only the default permissions for the general right are activated.

4. *What is the Using Advanced Module Permissions?*

This appears if you make adjustments to the default permissions for a General Right on the Advanced Module Permissions tab.

5. *How do I get to the Advanced Module Permissions?*

Click on the Advance Module Permissions tab or press Ctrl-N. Use of Advanced Module Permissions is optional.

6. *How do I save the new user?*

To save the new user record, click Save and Close at the bottom right.

D. Viewing, Modifying and Removing Users

1. *How do I view a list of all users?*

To view a list of all **ANCS+** users, go to User Security. All users are shown in the List Pane.

2. *How do I see the full name and security rights for a specific user?*

To see the full name and security rights for a specific user, select that user in the List Pane. The user security record will load into the Record Pane. Click on the various tabs in the Record Pane to view the main and user security information for that user.

3. *How do I change the security information for an existing user?*

To change security information for an existing user:

- Select the User ID in the List Pane that you wish to edit.
- Select Modify this Record from the Edit menu or press F10, or click the Modify button. The record will open in a new window with Modify Mode indicated in the status bar at the lower right.
- Make any changes desired.
- Click Save and Close when finished.

The system changes the security information for the user. A system message tells you that the changes will take effect the next time the user logs in.

4. *How do I remove a user from **ANCS+**?*

To remove a user from **ANCS+**:

- Select User Security under System in the Navigation Pane.
- Select the user you wish to delete in the List Pane.
- Select Delete This Record under Delete Record(s) from the Edit menu.
- The program will ask "Are sure you want to delete this record?" Click Yes to delete it or No to keep it.

5. *Can I view a user's password if they have forgotten it?*

No. You cannot view user passwords. If the user does not remember their password, you can assign a new one to them.

To assign a new user password:

- Select User Security under System in the Navigation Pane.
- Select the user in the List Pane that needs a new password.
- In the Record Pane, on the Main Information tab, click Set Password. **Note:** You do not have to be in modify mode to change the password.
- Enter a new password twice and click Set Password.
- The user can now log in with the new password.

E. Directory Level Security

1. *Is there additional security available at the directory level?*

Yes. You may assign security rights for specific directories.

2. *What is the purpose of security at the directory level?*

Security at the directory level provides a way to set security on a directory-by-directory basis depending on the user's need to work with the data. For example, a user may need to add and modify records in one directory but only need to view the records in another directory.

3. *Should I adjust users' rights for a specific directory?*

Use the directory level security only when it is absolutely necessary. You must find the right balance between too much and too little security. Restricting users' access too greatly places an added burden on the system administrator, as well as the users. Both the system administrator and users' work are interrupted when the system administrator must stop to change the users' security rights.

Note: Consider giving users their own "working directory" and assigning all security rights to them for that directory. When their work is accepted, it can be transferred into the master database. You can then restrict full access to the master database. Refer to Section III of this chapter for information on creating working directories.

4. *Do directory security rights override global security rights?*

Yes. Directory security rights override global security rights. For example, a user may have data entry rights at the global level but not in the natural history directory. The user will be able to enter and modify data in the cultural resources directory but not the natural history directory.

5. *How do I create separate security rights for individual directories?*

To create directory specific security rights for a user:

- Select User Security under System in the Navigation Pane.
- Select the User ID in the List Pane for which you wish to create directory specific rights.
- Modify the record by pressing F10, or clicking the modify button, or selecting Modify This Record on the Edit menu. The record will open in Modify Mode in a separate window.
- Click on the User Security Information tab.
- Select the directory from the list on the left for which you wish to set up directory specific rights.
- Once you select an individual directory, a message appears on the screen indicating that you must click Add to override the global security permissions for this directory. Individual directories will inherit the global security rights unless specific directory-level security rights are assigned. Click the Add link in the upper right.
- Update the security rights for this directory. The changes you make will only apply to the directory you selected. See B.5, B.6 and B.7 above for information on the security rights options.
- Click Save and Close when you have finished.

The best way to limit a user to a specific directory is to first add their user profile to the system with the minimum rights you want them to have in all directories. Then modify their profile and give them more rights in the directories they need to access. For example, add a user and give them Research rights overall. Then, modify their profile and add rights to their working directory assigning them Data Entry for that directory only.

6. *How can I tell in which directories a user has directory-specific rights?*

The directory list on the User Security Information tab shows a flag next to the directories that have specific security rights assigned for that user. All other directories will use the Global security rights.

7. *How do I view the directory specific rights?*

To view the directory-specific rights for a user:

- In the User Security List Pane, select the user you wish to view.
- In the Record Pane, click on the User Security Information tab.
- Select the directory from the list that has a flag next to it indicating that there is directory-specific security assigned.
- The directory security will be displayed.

8. *How can I change the directory specific information for a user?*

To change the directory specific security for a user:

- In the User Security List Pane, select the user you wish to edit.
- Modify the user profile by clicking the modify button , or selecting Modify This Record from the Edit menu. The record will open in a separate window.
- Click on the User Security Information tab
- Select the directory on the left for which you wish to modify the security rights.
- Make the needed changes to the user's directory security information.
- Click <u>Save and Close</u> when finished.

A system message tells you that the changes to the user's security will take effect the next time they log in.

9. *How do I remove the directory-specific security for a user?*

To remove the directory-specific security for a user:

- In the User Security List Pane, select the user you wish to edit.
- Modify the user profile by clicking the modify button , or selecting Modify This Record from the Edit menu. The record will open in a separate window.
- Click on the User Security Information tab
- Select the directory on the left that you wish to remove the specific security rights. Only those marked with a flag have directory specific security.

- Click Delete in the upper right to remove the specific rights for this directory. The directory will now use the global security permissions assigned to the user.

- Click Save and Close when finished.

A system message tells you that the changes to the user's security will take effect the next time they log in.

F. Additional Questions About User Security

1. *Can I add a user to **ANCS+** and not check any of the security rights boxes?*

Yes. If you don't check any of the security rights boxes, and leave the general right as custom, you limit the user to Public Search only. Refer to Appendix D: Public Search, for additional information about the Public Search feature.

2. *Should our park keep the general User ID and general password that comes with **ANCS+**?*

Until you establish the same security rights for your **ANCS+** system administrator, keep the:

- general User ID

- general password

- security rights that come with the general User ID.

Delete the general User ID, when the park system administrator:

- is comfortable with **ANCS+** security rules and procedures, *and*

- has a User ID and password with equivalent rights in place.

Note: Every **ANCS+** system is shipped with the same general User ID and general password.

3. *Should the system administrator routinely work in **ANCS+** with full security rights?*

No. Every system administrator should have two User IDs. One User ID should carry system Administrator security rights and one should not. No one should routinely work in the master database with Administrator rights.

Log in as system administrator with administrator rights only when you need them.

4. *What if I lose my password and am unable to get into **ANCS+**?*

If you are…	***Then…***
an **ANCS+** user,	ask your system administrator for help.
an **ANCS+** system administrator,	contact Re:discovery Software, Inc. for help. Their telephone number is 434-975-3256. Their fax number is 434-975-3935.

G. User Security Profile Report

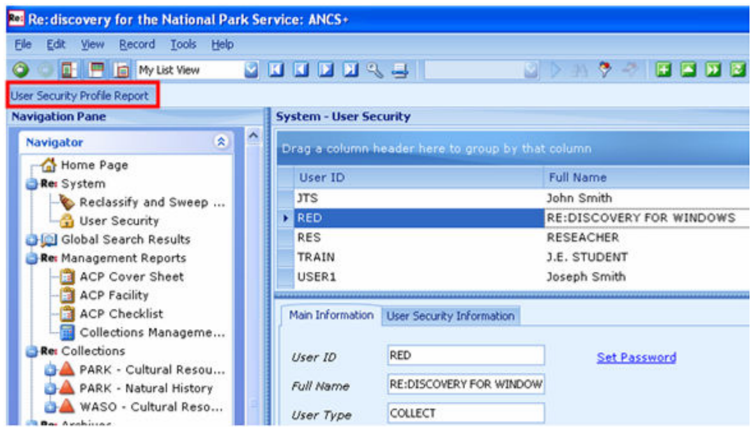
1. *What is the User Security Profile Report?*

The User Security Profile Report lists each user with their security profile and what options each user's profile contains.

2. *How do I run the User Security Profile Report?*

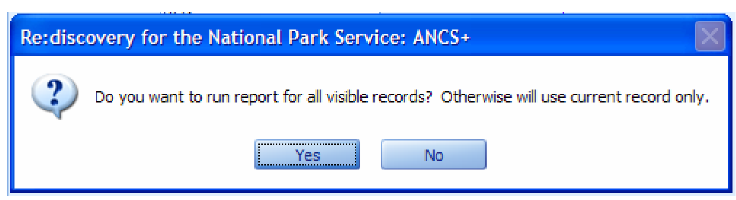
To run the report:

- Select User Security under System in the Navigation Pane.
- Click the User Security Profile Report button on the Button Bar

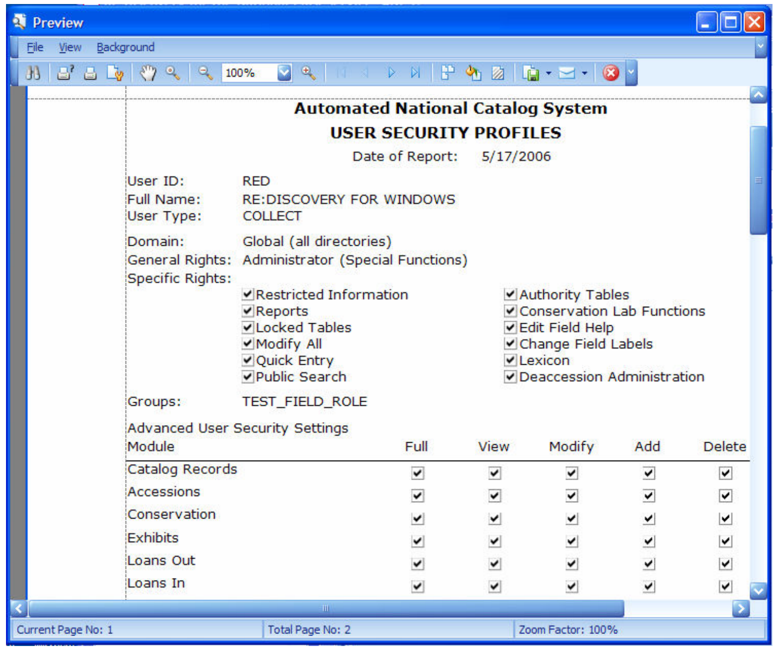


- A system message will ask if you want to run the report on all visible records. This report will run on the currently selected user security profile by default, but may be run for all visible records to generate a complete list of ALL security profiles in the program.

If you want to run the report on…	***Then…***
all visible user profiles,	click Yes
the currently selected user profile,	click No



- The resulting report may be previewed on the screen and then sent to the printer.



- Click the printer button on the button bar or choose Print from the File menu.

H. Manage User Log

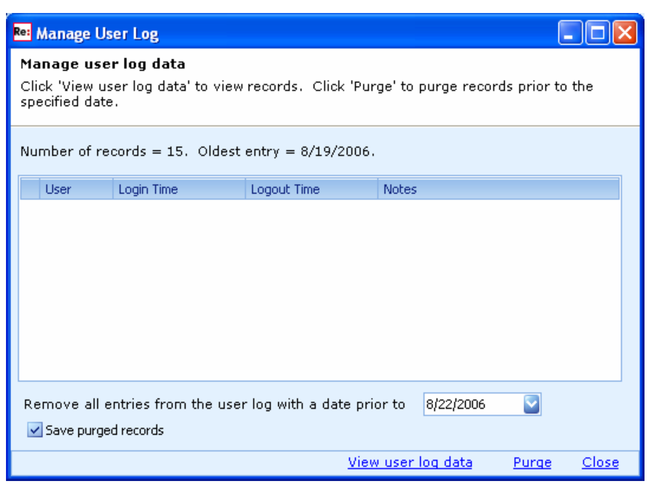
1. *What is the Manage User Log tool?*

The program logs all access to the system. The Manage User Log feature allows you to manage the system-generated log of user access. The data in this file can assist in identifying errors or tracking system use.

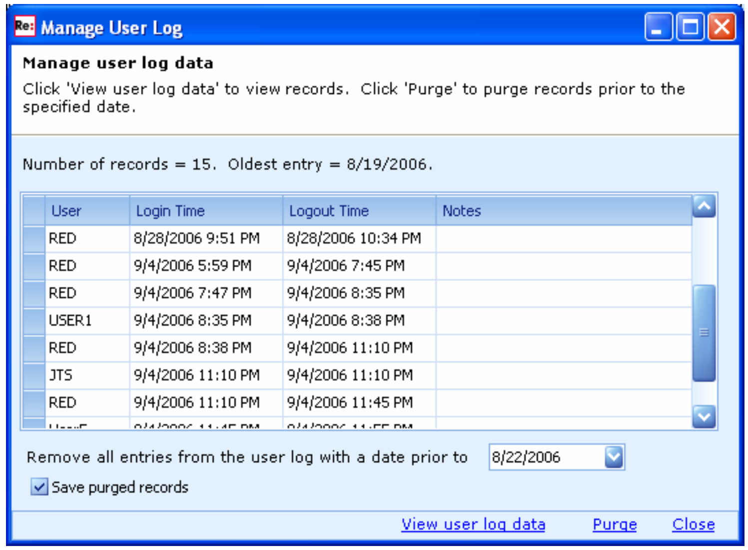
2. *How do I access the Manage User Log feature?*

To access the Manage User Log feature:

- Select User Security under System in the Navigation Pane.
- On the Tools menu, select Manage User Log. The Manage User Log window will open.



- Click View user log data at the bottom to load the records into the window.



3. *What information is available in the User Log?*

The Manage User Log window:

- indicates the number of records contained in the user log
- shows the date of the oldest entry
- lists the User ID of each person who logged into the system
- allows you to view a history of each user's login date/time and logout date/time. **Note:** The records are initially arranged in chronological order by the Login Time – oldest to newest.

You can sort by a different column by clicking on the column header. For example, to sort the list by User ID, click on the User column header.

You can also use quick filter on the User column. Hover over the column header and click the small down arrow that appears in the upper right corner of the header. Select the User name to filter for. To clear the quick filter, click the small down arrow on the column header again and choose All. (See Section II of Chapter 7 for information on using Quick Filters.)

4. *What is the Purge function?*

The purge function clears the user log of outdated records.

5. *Why would I want to purge the user log?*

Although the user log file is small, you may need to reduce it from time to time, especially on heavily accessed multi-user systems.

6. *How do I purge the user log?*

To purge the user log:

- Specify a date to use for purging the file. Enter the date in the "Remove all entries…" field or click the down arrow to access a calendar and choose a date.
- The "Save purged records" box allows you to save the purged records to an alternate directory. Check this option if you wish to save the purged records. Uncheck this option if you do not need to save the purged records.
- Click <u>Purge</u>.

- A message will appear asking if you are sure you want to purge the records found before the specified date. Click Yes to purge the records.

- If you chose to save the purged records, a Save As window will appear for you to select a location to save the xml file. The file is named "User Log Records(*date-date*).xml" with the date range of the purged records in the file name. Click Save after selecting the location.

- You will get a confirmation that the user log records were purged. Click OK.

All records prior to the date you specified will be deleted from the user log.

7. *How do I exit the Manage User Log window?*

To exit the Manage User Log window, click Close at the bottom right, or click the red X in the upper right corner.

VI. SYSTEM OPTIONS

A. Overview

1. *What is System Options?*

Use System Options to configure certain elements of the entire system and specific data directories.

2. *Do I need special security rights to use System Options?*

Yes. System Options is available only to users with Administrator rights. See Section V of this chapter for information on User Security.

3. *When would I use System Options?*

Use System Options to:

- set the number of records for paging limits for large data sets
- tell the system which directories need to share data
- name which fields you want available in your Public Search (the portion of the program that allows public access to selected collections data)
- set the Auto Save time interval

4. *How do I access System Options?*

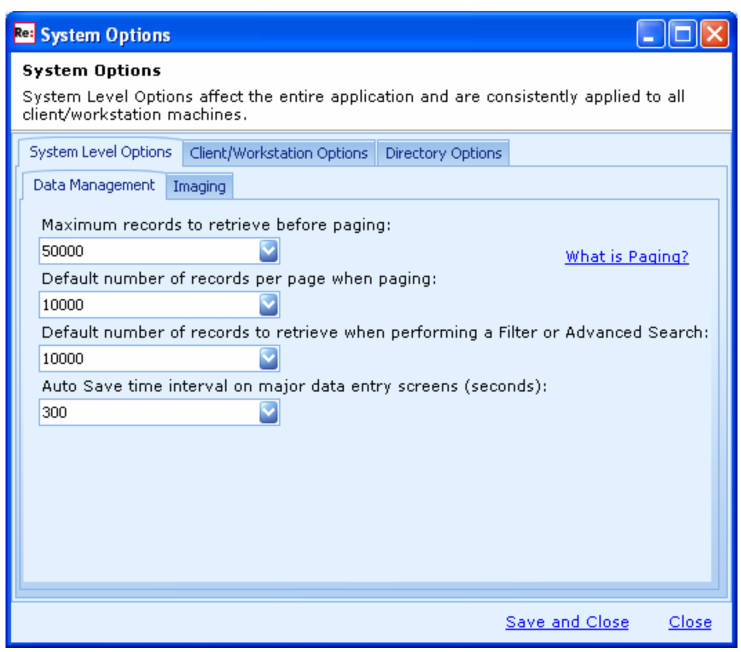
System Options is accessed from the Tools menu.

B. System Level Options

1. *What are the system options on the Data Management tab?*

The Data Management tab includes the settings for:

- Paging
- Auto Save time interval



2. *What is Paging?*

Some institutions have very large collections and as a result a single table in a directory may contain a large number of records. The software includes a way to interact with Large Data Sets that differs slightly from normal navigation. Certain features and navigation tools work a bit differently in order to optimize your use of the system.

When you have a large number of records, the system can work more efficiently when it only has to load a certain number of records at a time, in pages. Your visible data is still all records in the system, tag set, or filter, but the records are divided into pages and only one page of records is downloaded to the workstation at a time.

For more detailed information on Large Data Sets and Paging, see Section VIII of this chapter.

3. *What are the paging options I can set?*

You can set the following paging options:

Maximum records to retrieve before paging

This number indicates the number of records that must be in a single table (catalog records, for example) in a single directory before paging is activated. The default setting is 50,000 records. If you have more than 50,000 catalog records in one directory, then paging will be activated in catalog records in that directory. If you have only 1200 Accession records, paging will not be active there. The maximum setting available is 50,000 records. Depending on the speed of your computer and server, you may notice a slower response time when this number is set higher than 10,000.

To change this setting, click the down arrow on the field and choose one of the number entries from the list.

Default number of records per page when paging

This number indicates the number of records that will load per page when paging is activated. The default setting is 10,000 records per page. If you have 60,000 catalog records in one directory, 10,000 records will be downloaded to your workstation at one time and there will be 6 pages with 10,000 records in each page.

This is similar to searching for “museum” in an on-line search engine such as Yahoo or Google. The search may find millions of matches but it will present the results to you in pages so you can navigate through them a page at a time rather than making your browser load all of them at once. The maximum setting available is 50,000 records. Changes to this setting apply when you log into the program the next time or after getting a new group of records in the affected directory.

To change this setting, click the down arrow on the field and choose one of the number entries from the list.

Default number of records to retrieve when performing a Filter or Advanced Search

This number indicates how many records the system loads in the Search Results tab when performing an Advanced Search. When you use your search results, the system will load all records found into the main screen. For a filter, this number indicates how many records will be retrieved and loaded into the main screen. The maximum setting available is 10,000 records.

Note: This sets a default number to retrieve but you can change/override this setting on the Advanced Search and Advanced Filter screens. See Section

VIII of this chapter for more information on using Advanced Search and Filter with Large Data Sets.

To change this setting, click the down arrow on the field and choose one of the number entries from the list.

4. *What is the Auto Save time interval?*

Auto Save saves data as you type at a defined interval, to prevent data loss in the event of a power outage. If a power outage occurs while adding or modifying records, your work will be saved in a temporary file. When you restart the program, the system will notify you that a record was saved and give you options for restoring or clearing the record from memory. See Section VII of this chapter for more information on Autosave records.

5. *How do I set the Auto Save time interval?*

On the Data Management tab in System Options, you can set the Auto Save interval from 0 to 600 seconds. At 0 seconds, Auto Save is inactive. The default Auto Save interval is set at 300 seconds (5 minutes)

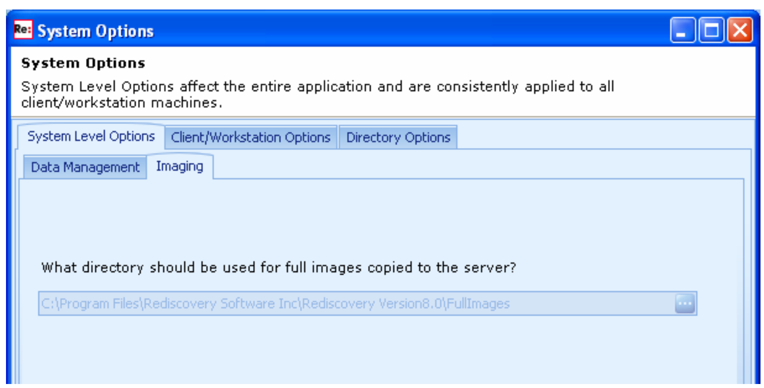
6. *What system information is on the Imaging tab?*

The Imaging tab shows the location where the full images are saved within the program when you attach an image to a record.

The default setting is:

C:\Program Files\Rediscovery Software Inc\Rediscovery Version8.0\Full Images

Note: You cannot change this setting.



C. Client/Workstation Options

1. *What options are available on the Client/Workstation Options tab?*

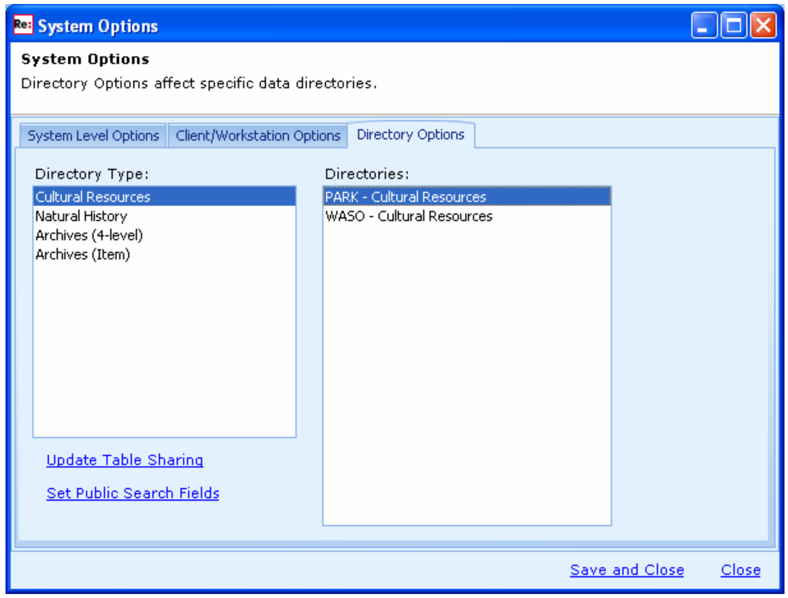
Currently, there are no options available on the Client/Workstation Options tab.

D. Directory Options

1. *What options are available on the Directory Options tab?*

The Directory Options tab allows you to:

- Set table sharing between directories
- Select the fields that appear in the Public Search



2. *What is Table Sharing?*

Table sharing lets you share specific tables between directories. For example, you may want to share your user-built authority tables, accession file, names and addresses file, and artist file among two or more directories. This prevents the need for duplicate data entry in each directory. Choose one directory to be the master directory, where the data will actually be stored by the system. Then set table sharing for the other directories to share with the master directory.

See Sections E-G below to set up table sharing for specific directory types.

3. *What is the Set Public Search Fields function?*

Use this function to define which data fields are shown in the "detail" screen of Public Search for a directory. Select the specific fields and set their order with this function. The next time you use Public Search, the fields you have chosen will appear on the Detail page.

4. *How do I set up the Public Search fields for a directory?*

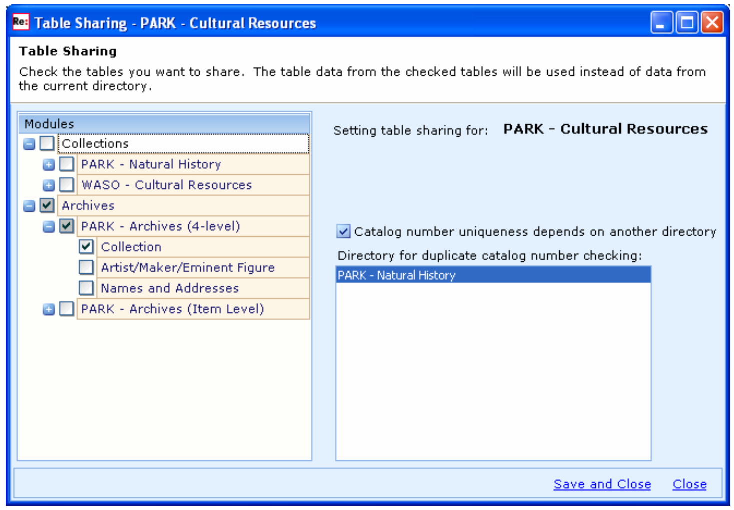
For detailed information on setting Public Search fields, refer to Section II of Appendix D, Public Search Configuration.

E. Table Sharing for Cultural Resources Directories

1. *How do I establish table sharing for my Cultural Resources directory?*

To set table sharing for your Cultural Resources directory:

- Open System Options from the Tools menu and select the Directory Options tab.
- Select Cultural Resources from the Directory Type list on the left
- A list of your Cultural Resources directories appear on the right. Select the main Cultural Resources directory for your park.
- Click Update Table Sharing



2. *How do I set duplicate catalog number checking for Cultural Resources?*

You must connect your Cultural Resources directory with your Natural History directory to enable the system to check for identical catalog numbers each time you add a new record. To set this sharing option in the window above:

- Check the "Catalog number uniqueness depends on another directory" option.
- Then select your main Natural History directory in the list that appears below this option.

The system will not allow you to save a new record with a duplicate catalog number.

3. *How do I connect the Archives directory to my Cultural Resources directory?*

To enable the system to transfer data from your Cultural Resources directory to your Archives directory, in the window above:

- Expand the Archives module node in the Modules box on the left by clicking the + (if necessary).
- Then click the + in front of your main archives (4-level) directory for your park.
- Check the Collection table under the archives directory.

Click <u>Save and Close</u> after selecting your table sharing options.

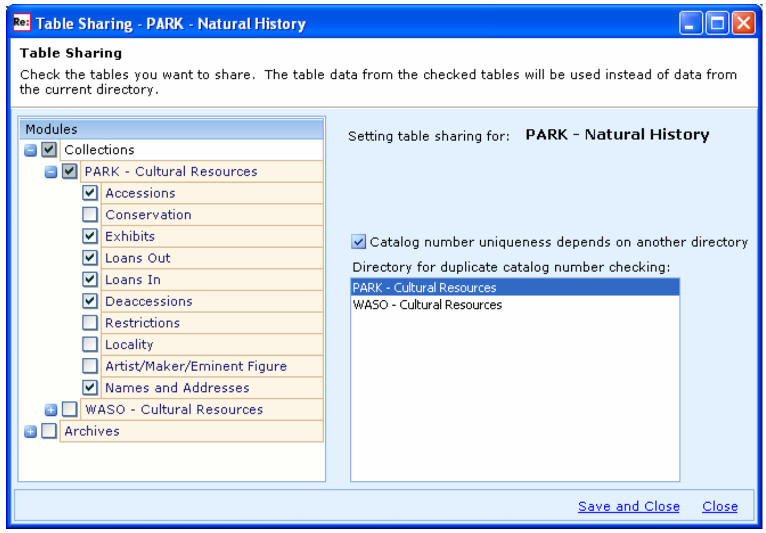
F. Table Sharing for Natural History Directories

1. *How do I establish table sharing for my Natural History directory?*

To set table sharing for your Natural History directory:

- Open System Options from the Tools menu and select the Directory Options tab.
- Select Natural History from the Directory Type list on the left
- A list of your Natural History directories appear on the right. Select the main Natural History directory for your park.

- Click Update Table Sharing



2. *How do I set duplicate catalog number checking for Natural History?*

To connect your Natural History directory with your main Cultural Resources directory for duplicate catalog number checking:

- Check the “Catalog number uniqueness depends on another directory” option.

- Then select your main Cultural Resources directory in the list that appears below this option.

The system will not allow you to save a new record with a duplicate catalog number.

3. *What other tables should I share in the Natural History directory?*

You should also select the following tables from your Cultural Resources directory for sharing:

- Expand the Collections module and then your main Cultural Resources directory by clicking the + in front of each in the Modules box.

- Check the Accessions associated module option so that the Natural History records share one accession table with the Cultural Resources records.

Note: Sharing the Accession table automatically shares the Exhibits, Loans Out, Loans In, and Deaccession tables.

- Check the Names and Addresses associate module so that the Natural History directory shares one Names and Addresses table with the Cultural Resources records.

- You may also want to share the Artist/Maker/Eminent Figure, Conservation, and/or Restrictions table with the Cultural Resources directory. Check these tables as desired.

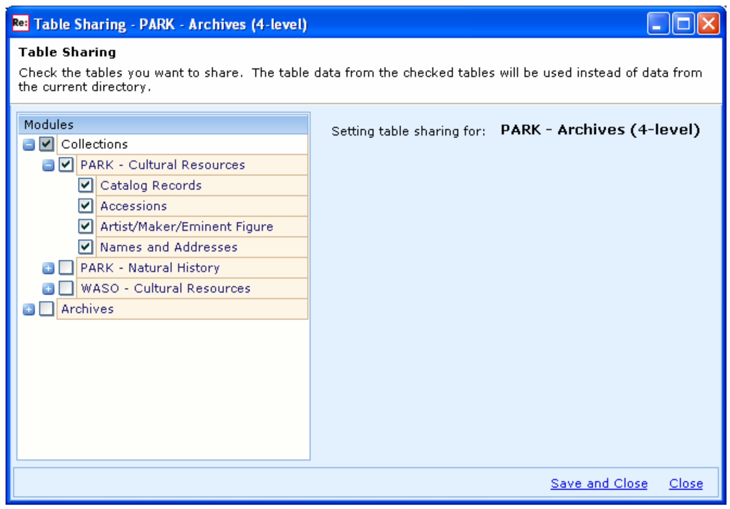
Click Save and Close after selecting your table sharing options.

G. Table Sharing for Archives Module Directories

1. *How do I establish table sharing for my 4-level Archives directory?*

To set table sharing for your 4-level Archives directory:

- Open System Options from the Tools menu and select the Directory Options tab.
- Select Archives (4-level) from the Directory Type list on the left
- A list of your 4-level Archives directories appear on the right. Select the main Archives directory for your park.
- Click Update Table Sharing



2. *How do I connect my 4-level Archives directory to my Cultural Resources directory?*

To connect the Archives directory to your Cultural Resources directory:

- Expand the Collections module in the Modules box by clicking the + (if necessary)
- Expand your main Cultural Resources directory
- Check Catalog Records under the Cultural Resource directory. This enables the system to transfer Archives information to your Cultural Resources records.
- Check Accessions so that your Archives records share one accession table with the Cultural Resources directory.
- Check Artist/Maker/Eminent Figure (optional).
- Check Names and Addresses (optional).
- Click Save and Close after selecting your table sharing options.

3. *How do I establish table sharing for my Item Level Archives directory?*

Follow the same process for the 4-level Archives directory above.

Note: The Item Level Archives directory is optional. It provides access to an Item Level screen in the Archives Module.

H. Other Table Sharing Options

1. *What if my park manages multiple collections?*

When you have finished setting up table sharing for all your park's directories, repeat this process for any other parks or collections in your system. Follow the steps outlined in E-G above.

2. *Can I share user-built authority tables between directories?*

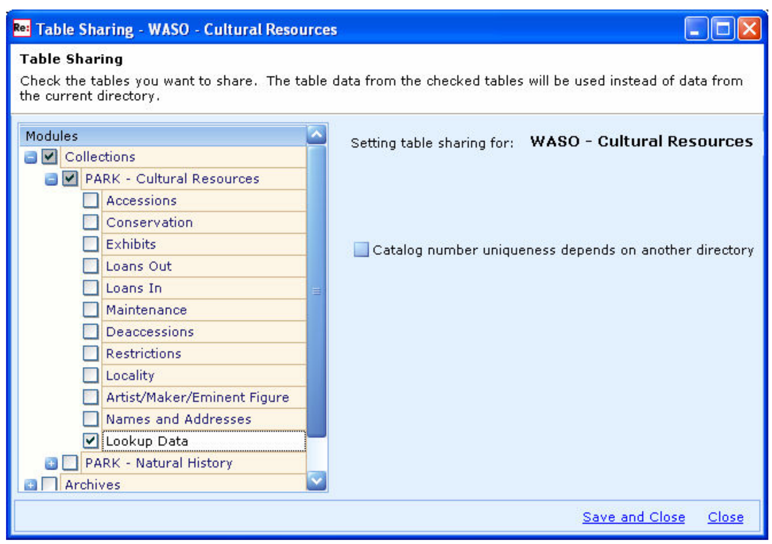
Yes. If you have well-established user-built authority tables in your main directories, you may want to share those tables with other auxiliary or working directories so that you don't have to populate authority tables over and over again.

Note: The sharing of authority tables can only be established between the same directory type (e.g., cultural resources with cultural resources, natural history with natural history, etc.).

3. *How do I set up table sharing for authority tables?*

To establish table sharing for authority tables between the same directory type:

- Open System Options from the Tools menu and select the Directory Options tab.
- Select the Directory Type on the left.
- Select the auxiliary or working directory that you want to establish sharing of authority tables from your master directory.
- Click Update File Sharing



- Expand the module (Collections or Archives) that matches your selected directory.
- Expand your master directory that is the same directory type.
- Check Lookup Data. This will make the authority tables from your main directory available in this working or auxiliary directory.
- Click Save and Close when finished.

4. *What other tables can I share between directories?*

You may wish to share other associated module tables from your master directory as well, such as Names and Addresses and Artist/Maker/Eminent Figure. Check any desired. The following is a list of the associated module tables available for sharing and the directory types that can share them.

Associated Module Table	***Directory Where Available***
Accessions	Cultural Resources, Natural History (**Note:** Accessions is not available independently in the Archives module directories, but you can set the Archives directory to share the Accessions table from a Collection directory.)
Conservation	Cultural Resources, Natural History
Exhibits	Cultural Resources, Natural History (**Note:** Exhibits is included when you select Accessions)
Loans Out	Cultural Resources, Natural History (**Note:** Loans Out is included when you select Accessions)
Loans In	Cultural Resources, Natural History (**Note:** Loans In is included when you select Accessions)
Maintenance	Cultural Resources
Preparation/Treatment	Natural History
Deaccessions	Cultural Resources, Natural History (**Note:** Deaccessions is included when you select Accessions)
Restrictions	All (Cultural Resources, Natural History, Archives) (**Note:** Restrictions cannot be shared between Collection directories and Archives directories)
Locality	Cultural Resources, Natural History
Artist/Maker/Eminent Figure	All (Cultural Resources, Natural History, Archives)
Names and Addresses	All (Cultural Resources, Natural History, Archives)

VII. AUTOSAVE

A. Overview

1. *What is Autosave?*

ANCS+ now saves your data as you work to prevent data loss in the event of a power outage. If a power outage occurs while adding, copying, or modifying records in the software, your work will be saved in a temporary file.

2. *How often is my data saved in autosave?*

Autosave is set to save your work every 5 minutes. This can be adjusted in System Options on the Tools menu. See Section VI.B of this chapter for information on changing the autosave interval.

3. *How does Autosave work?*

As you work, autosave saves your records to a temporary file at the interval specified in the System Options. When you save a record normally, the temporary file is cleared out. If a power outage occurs before you save the record, the temporary file retains a copy of the record.

These autosave records are linked to your user ID. When you start **ANCS+** again, the system will notify you that records were saved. Other users will not see this notification when they log in unless they have records waiting in autosave as well.

4. *What kind of records are saved with autosave?*

Any records that are in modify, copy or add mode will be saved by autosave if a power outage occurs. This includes all catalog and archive records and all associated module records.

B. Autosave Notification

1. *What is the Autosave Notification?*

The Autosave notification appears when you log in to the program and have records in a temporary file that were not saved normally.

Note: These autosave records are linked to your User ID. Other users will not see this notification if they do not have any unsaved records in autosave.

2. *What should I do if I get this autosave notification?*

If you receive the Autosave Notification when you log in to the program, there are several actions you can take.

You can choose to:

- view the autosave records immediately by clicking View Now
- view the autosave records later by clicking View Later
- clear all the records out of autosave (for your user ID) without viewing or saving them by clicking Clear Autosave

Note: If you do not save or clear out the autosave records at this time, this notification will appear each time you log in until all records are cleared or saved.

3. *What does the View Now option do?*

View Now will open the list of records saved in autosave to allow you to find and restore any records that have not been saved. See Section C below for information on viewing autosave records.

4. *What does the View Later option do?*

View Later closes the Autosave Notification window allowing you to continue working in the program. It saves the autosave records for you to view later at a more convenient time.

5. *How can I view the autosave records later?*

To view autosave records later, choose the Autosave option on the Tools menu. Or, when you log in to the program again, the autosave notification will reappear for you to choose View Now.

Note: The Autosave option on the Tools menu is grayed out if no records are available in autosave.

6. *What does the Clear Autosave option do?*

Clear Autosave deletes all records in the autosave temporary file that are associated with your User ID. You do not get a chance to view the records before deletion.

You will get a message asking if you are sure you want to clear all autosave records. Click Yes to clear them or No to leave them in autosave.

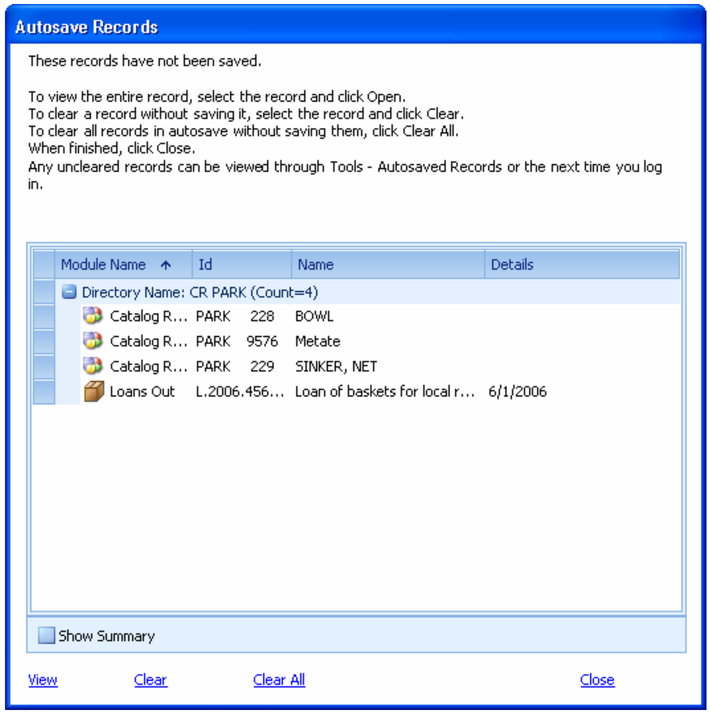
C. Viewing Autosave Records

1. *How do I view the autosave records?*

To view the records saved by autosave:

- Click the View Now option on the Autosave Notification window that you receive when you log in to the program, *or*
- Select Autosave on the Tools menu.

The Autosave Records window will open. The records are listed by the directory and module name. The Id will be the catalog number or unique identifier for the record such as the loan number or exhibit ID. The Name field lists another significant identifying field for that module such as object name or loan description to help you identify the record.



2. *How can I view the entire record?*

To view the entire record:

- Highlight the record in the list you wish to view.
- Click <u>View</u> on the bottom left.

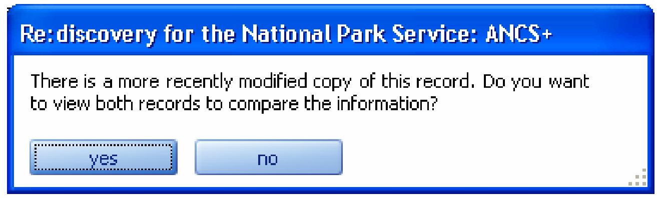
The full record will open in a new window. The title bar on the record window will indicate that it is an autosave record.

3. *How do I save the autosave record?*

When you open an autosave record, there are several options for saving it depending on what mode you were in when the power outage occurred.

> ***If you cancel or close the autosave record at any point without saving, it will be cleared from the autosave list and cannot be retrieved again.***

If you were in…	***Then…***
Add or Copy mode,	the record will open in Modify mode and allow you to save it as a new record. Click <u>Save and Close</u> to save the record.
Modify mode and that record was not modified again later,	the autosave record will open in Modify mode and allow you to save it, replacing the original record. When you click <u>Save and Close</u>, a message will appear asking if you want to replace the original record with the one from autosave. Click Yes to replace it.
Modify mode and the existing record was more recently edited than the autosave record,	you will get a message that a more recently modified copy of this record exists and have the opportunity to open both records to compare them.



If you click…	*the program will…*
Yes,	open the autosave record in Modify mode while the more recently modified record will open in View mode. You can compare the data and copy information from the more recently modified record into the autosave record using copy and paste options, if desired. **Note:** You cannot copy data from the autosave record to the existing record since it opens in View Mode only and cannot be edited.
No,	open only the autosave record in Modify mode.

If you save the Autosave record at this point, you will get a message asking if you want to replace the more recently modified record.

- Click Yes to save the Autosave record replacing the more recent record.
- Click No to not overwrite the more recent record. You will be returned to the Autosave record which will still be in modify mode. You can then Cancel the record, which will clear it from autosave.

4. *How do I delete the autosave record without saving it?*

If you do not want to save the record that is in autosave:

- highlight the record in the list and click Clear at the bottom of the Autosave Records window, *or*
- if you have the entire record open, click Cancel and the record will be removed from autosave.

You will get a message asking if you are sure you want to clear the autosave record without saving it. Click Yes to clear it.

5. *Can I clear all the records in the list at once without saving them?*

Yes. If you do not want to save any records in the autosave list, click Clear All in the Autosave Records window. You will get a message asking if you are sure you want to clear all records from autosave. Click Yes to clear them all, or No to return to the list.

6. *How do I exit from the Autosave Records list?*

To exit the Autosave Records window, click Close. Any records that have not been cleared will remain in the list and you will get a notification the next time you log in.

7. *Can I view autosave records logged by another user?*

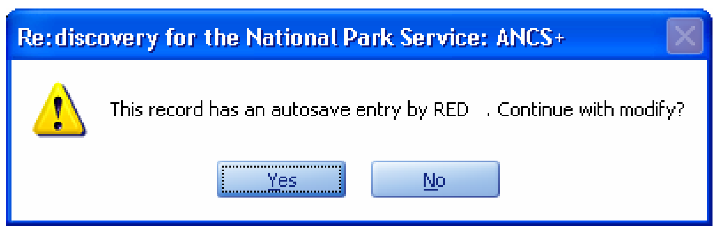
No. Only the User ID that logged the autosave record can view the autosave records.

D. Other Features of Autosave

1. *What happens if I modify a record that also has an autosave record waiting?*

If another user was modifying a record when a power outage occurred and the record was saved in autosave, you (as a different user) will not see the autosave notification. Therefore, you could modify the same record before it is retrieved from autosave.

If a user tries to modify a record that has an entry in autosave, they will get the following message to alert them that there is an updated version waiting in autosave. The user id who has the record in autosave will be indicated. Only that user can save or clear the record from the autosave list.



- Click Yes to modify the record anyway. When the autosave entry is opened later, there will be an option to compare the two records as described above.
- Click No to cancel the modify. You or the user who has the record in autosave can then restore it or clear it as necessary.

VIII. LARGE DATA SETS AND PAGING

A. Overview

1. *What are Large Data Sets?*

Some institutions have very large collections, and as a result a single table in a directory may contain a large number of records. The software includes a way to interact with Large Data Sets that differs slightly from normal navigation. Certain features and navigation tools work a bit differently in order to optimize your use of the system.

2. *What is Paging?*

When you have a large number of records, the system can work more efficiently when it only has to load a certain number of records at a time, in pages. Your visible data is still all records in the system, Tag Set, or Filter, but the records are divided into pages and only one page of records is downloaded to the workstation at a time.

3. *How do I know if I need to use Paging?*

If a single table in any directory (such as catalog records) is larger than 50,000 records, that table will use Paging.

50,000 is the maximum number of records the system will return before activating Paging.

If your system seems slow to populate the List Pane and Record Pane, you may want to adjust the Paging limit to a lower number than 50,000, so that the records are downloaded and available more quickly.

4. *How will Paging affect the use of records in a directory?*

With Paging activated, the system will only download the maximum number of records into the List Pane as specified in the Paging settings defined in System Options.

What this means is that if you have 65,000 catalog records in a single directory and the maximum number of records to retrieve before Paging is set at 50,000 records, Paging will be activated. The 105,000 records will be divided into pages of a specified number per page. For example, you may have a setting of 5,000 records per page when Paging is activated, so your 65,000 catalog records will be divided into 13 pages of 5,000 records each.

Paging is only activated for the table that exceeds the maximum records setting. In the same directory as the 65,000 catalog records example above, if you access an associated module such as Accessions that has only 8,000 records, Paging will not be activated for that table. All 8,000 records will be downloaded to the workstation.

You will still be able to search the entire directory regardless of how many records are currently downloaded.

This is similar to searching for "museum" in an on-line search engine such as Yahoo or Google. The search may find millions of matches but it will present the results to you in pages so you can navigate through them a page at a time rather than making your browser load all of them at once.

5. *Can I set how many records are downloaded per page?*

Yes. The user can control some Paging settings such as how many records must be in a database before Paging is activated and how many records are loaded into each page. These settings appear in System Options on the Tools menu and are located on the Data Management Tab under System Level Options. These settings are system wide and will apply to all workstations.

6. *What features are affected by Paging?*

The features that work a bit differently when Paging is activated are:

- Get
- Quick Search
- Quick Filter
- Quick Sort
- Advanced Search
- Advanced Filter
- Print List and Preview List
- Export List
- Grouping
- My List View

Refer to the sections below for information on how these features work when Paging is activated.

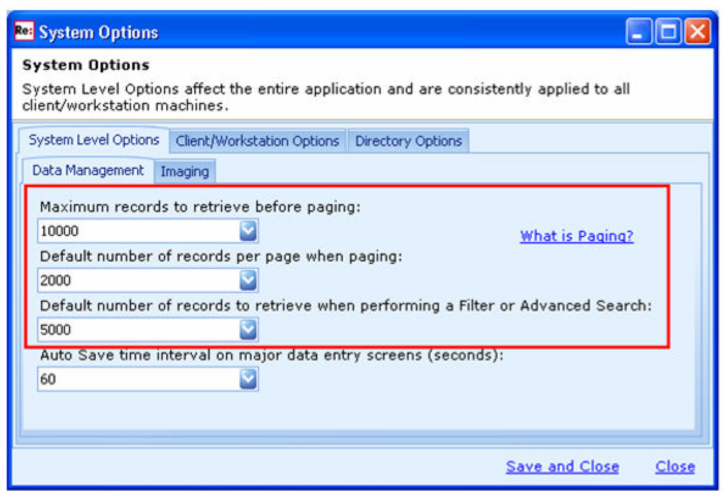
B. Large Data Set and Paging Settings

1. *How do I change the Large Data Set and Paging settings?*

To change the Large Data Set and Paging settings:

Select System Options on the Tools menu. (**Note:** You must have Administrator rights to access System Options.)

The Paging settings are on the Data Management tab of the System Level Options page.



2. *How do I set the maximum number of records before Paging is activated?*

The system default setting for the maximum number of records in a directory before Paging is activated is 50,000. This is also the maximum setting available. Depending on the speed of your computer and server, you may notice a slower response time when this number is set higher than 10,000.

To change this setting to a lower number in the Systems Options window, click the down arrow on the "Maximum records to retrieve before Paging" field. Changes to this setting apply when you log into the program the next time or after getting a new group of records in the affected directory. Your choices are:

- 500
- 1000

- 2000
- 5000
- 10000
- 20000
- 50000

Using the setting of 10,000, for example, if you have more than 10,000 catalog records in one directory, then Paging will be activated in Catalog records in that directory. If you have only 8,000 accession records, Paging will not be active there.

3. *What is the "Default number of records per page when Paging" setting?*

The "Default number of records per page when paging" number indicates the number of records that will load per page when Paging is activated. The system default is set at 10,000 records per page.

To change this setting to another number in the Systems Options window, click the down arrow on the field. Your choices are:

- 100
- 200
- 500
- 1000
- 2000
- 5000
- 10000
- 20000
- 50000

Using the a setting of 2000 records per page, for example, if you have 66,000 catalog records in one directory, only 2000 records will be downloaded to your workstation at one time and there will be 33 pages of 2000 records in each page.

4. *What is the setting for records to return when using Filter or Advanced Search?*

The "Default number of records to retrieve when performing a Filter or Advanced Search" number indicates how many records the system loads in the Search Results tab when performing an Advanced Search. When you use your search results, the system will load all records found into the main screen. For a Filter, this number indicates how many records will be retrieved and loaded into the main screen. The maximum setting available is 10,000 records.

To change this setting to a lower number in the Systems Options window, click the down arrow on the field. Your choices are:

- 500
- 1000
- 2000
- 5000
- 10000

Note: This sets a default number to retrieve but you can change/override this setting on the Advanced Search and Advanced Filter screens. See sections D and E below for more details on using Advanced Search and Filter with Large Data Sets.

C. Large Data Set Navigation

1. *How do I navigate through the pages when Paging is activated?*

A Large Data Navigator is available to the user to make viewing and navigating large data sets easier.

2. *Do I have to use the Large Data Navigator when Paging is activated?*

No, you do not have to use the Large Data Navigator when Paging is activated. However, if the Large Data Navigator is not active, then the system will download only the top number of records as set in the System Options (2000 records in the example above) without a way to navigate to other records.

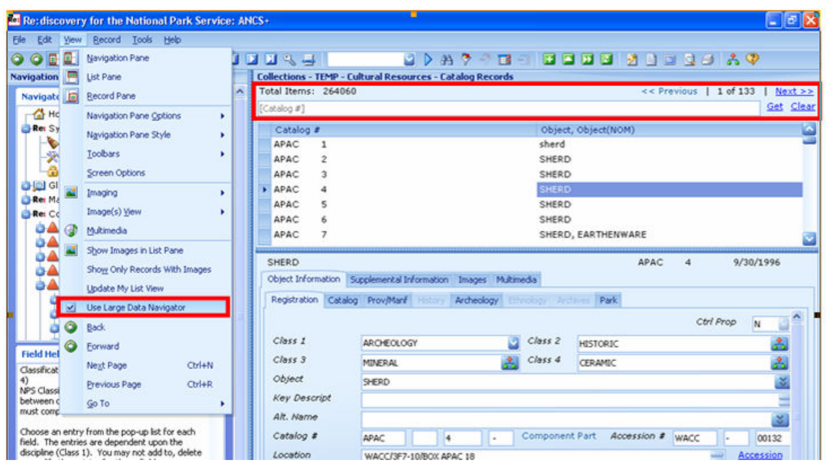
Most of the time, using the Large Data Navigator will be the most flexible and efficient way to navigate large data sets. You will still have access to most commonly used features, Sorts, My List View, Reports, Search, and Advanced Filter.

3. *When would I not want to use the Large Data Navigator?*

The best time to not use the Large Data Navigator is when you have a Tag Set containing fewer records than the number of records per page setting and you want to use Quick Sort, Quick Filter, or Grouping in the List Pane.

4. *How do I turn on the Large Data Navigator?*

When viewing records where Paging is activated, turn on the Large Data Navigator by checking the “Use Large Data Navigator” option on the View Menu.



The Large Data Navigator will appear above the List Pane and displays the number of records in your visible data and number of pages. The number of records currently loaded still appears in lower right in the Status Bar.

5. *What does the Total Items number indicate in the Large Data Navigator?*

Total Items is the number of records in your visible data, Tag Set, or Filter.

If you want to know how many records are loaded per page, look at the number in the status bar at the bottom of the page.

Note: If you use shift-click or control-click to select multiple records in the list pane, the number of records in your visible data is now the number that appears in the Status Bar and any action such as running reports or transfer will only affect those selected records.

6. *How do I move through the pages of records when Paging is activated?*

To move from one page to another when Paging is activated:

- Click Next > > in the Large Data Navigator to move to the next page of records
- Click < < Previous in the Large Data Navigator to move to the previous page of records

7. *How do I jump to a specific record when Paging is activated?*

To go to a specific record in your data based on the sort order, use the Get option in the Large Data Navigator as follows:

- Enter what you are looking for into the field in the Large Data Navigator. For example, if you are sorted by Catalog Number, enter a catalog number. If you are sorted by object name, enter an object name.
- Press Enter or click Get

When the records are retrieved, the Paging starts over at the first record found and continues to the end of the data set. The textbox will only allow you to do a Get on the first field of your sort. To do a more advanced Get you can always use the standard Get on the toolbar.

8. *How do I return to the very beginning of my records?*

To return to the beginning of you records (based on the sort order), click Clear in the Large Data Navigator.

9. *Why do the First Record and Last Record functions not go to the very beginning or end of my data?*

The First Record and Last Record functions on the button bar or on the Record menu only apply to the current page of data.

For example, if you are on page 3 of your data when Paging is activated, the First Record button will only take you to the top of page 3 and the Last Record button will only take you to the bottom of page 3 of your data.

To advance to other pages, use the Large Data Navigator's Next and Previous links. Or use the Get function as described in C.7 above.

10. *Can I use Quick Sort when Paging is activated?*

Quick Sort works differently when Paging is activated.

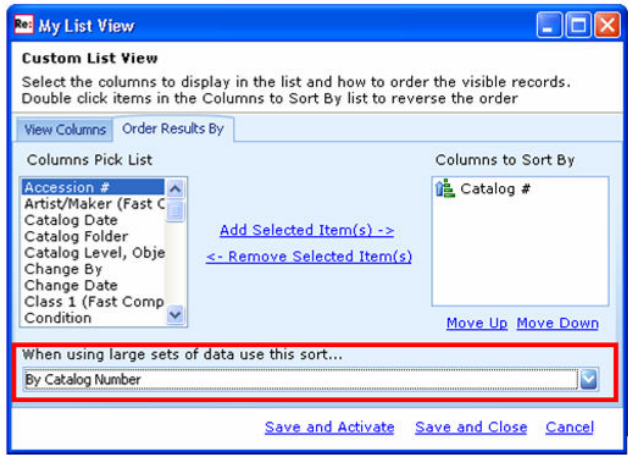
If the Large Data Navigator is…	***Then…***
Active	you cannot use Quick Sort to resort the data by a specific column in the List Pane.
Not Active	you can use Quick Sort in the List Pane, but it only applies the sort to the current page of records.

This feature is best used for an active Filter or Tag Set containing fewer records than the "Maximum records to retrieve before Paging" setting in System Options.

Note: If you want to change the sort order for the entire table, you must use the Sorts on the button bar or under the Sort option on the Record menu.

11. *How is My List View affected by Paging?*

When creating a My List View sort option, you can still select which fields to be displayed in the list view. However, instead of selecting which individual fields to sort the records, you will need to use one of the standard sorts that appear in the list on the Button Bar or under the Sorts option on the Record Menu.



To select the sort option in My List View for large data sets:

- Select Update My List View from the View menu.
- Select the Order Results By tab
- Under "When using large sets of data use this sort…", click the down arrow on the field and choose the sort order you want My List View to use.
- For Get to work in the Large Data Navigator for the My List View sort, you must also select the same field that the sort uses from the Column Pick List and add it to the Columns to Sort By. **Note:** There can be only one field in the Columns to Sort By list for large data sets.

12. *Can I use Grouping when Paging is activated?*

Grouping works differently when Paging is activated.

If the Large Data Navigator is…	***Then…***
Active	you cannot use Grouping in the List Pane.
Not Active	you can use Grouping in the List Pane, but the grouping only applies to the current page of records.

This feature is best used for an active Filter or Tag Set containing fewer records than the "Maximum records to retrieve before Paging" setting in System Options.

D. Filtering Large Data Sets

1. *Can I use Quick Filter when Paging is activated?*

Quick Filter works differently when Paging is activated.

If the Large Data Navigator is…	*Then…*
Active	you cannot use Quick Filter to filter the data in the List Pane.
Not Active	you can use Quick Filter in the List Pane, but it applies the filter to the current page of records only.

This feature is best used for an active Filter or Tag Set (small data set) containing fewer records than the “Maximum records to retrieve before Paging” setting in System Options.

Note: If you want to filter for records in the entire table, you must use the Advanced Filter.

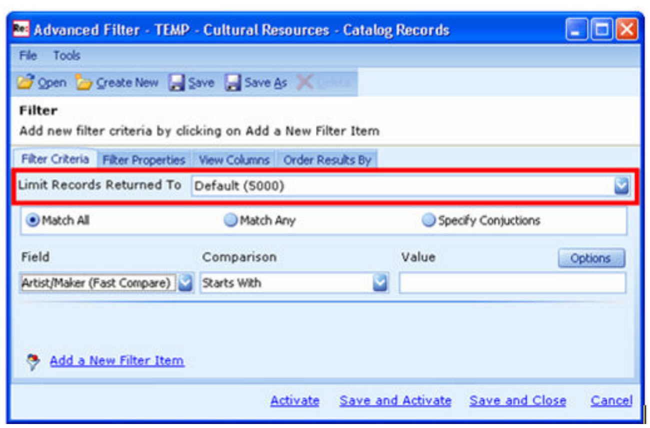
2. *How do I use Advanced Filter with Large Data Sets and Paging?*

Advanced Filter on the Button Bar or Record Menu contains 2 settings related to Large Data Sets and Paging.

- Limit Records Returned To
- Order Results By

3. *What is the Limit Records Returned To setting?*

The “Limit Records Returned To” setting on the Filter Criteria tab is set by default to the “Default number of records to retrieve when performing a Filter or Advanced Search” setting in System Options.



If the number of records found that match an Advanced Filter is…	*then…*
<u>less</u> than the “Limit Records Returned To” setting **AND** <u>less</u> than the “Maximum records to retrieve before Paging” setting in System Options,	all of the records will be downloaded to the workstation and appear in the List Pane. The total number of records will appear in the Status Bar.

less than the “Limit Records Returned To” setting **AND** more than the “Maximum records to retrieve before Paging” setting in System Options,	Paging will be active. The total number of records found that match the Advanced Filter will appear next to Total Items in the Large Data Navigator (if active) as will the number of pages of results.
more than the “Limit Records Returned To” setting,	only that number of records will be downloaded to your workstation and appear in the List Pane. In this case, not all of the records that matched the Advanced Filter will be in your visible data.
more than the “Maximum records to retrieve before Paging” setting in System Options **AND** the “Limit Records Returned To” is set at “Greater than 10000,	Paging will be active. The total number of records found that match the Advanced Filter will appear next to Total Items in the Large Data Navigator (if active) as will the number of pages of results. The number of records in the current page will appear in the lower right in the Status Bar.

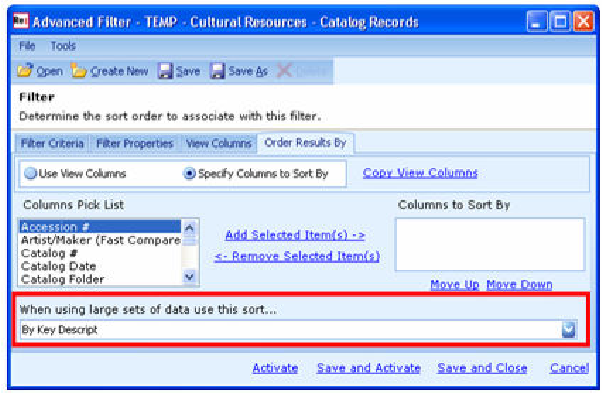
4. *Can I change the default setting from the Advanced Filter window?*

Yes. To change the default setting for the number of records returned, select an entry from the drop down menu. Your options are:

- 10
- 20
- 50
- 100
- 200
- 500
- 1000
- 2000
- 5000
- 10000
- Greater than 10000

5. *How do I order the results of a filter when using large sets of data?*

When you create an Advanced Filter, you have the option of choosing a field to sort the results by from the Advanced Filter window. When Paging is activated on large data sets, instead of selecting which individual fields to sort the filtered records, you will need to use one of the standard sorts that appear in the list on the Button Bar or under the Sorts option on the Record Menu.



To select the sort option for an Advanced Filter for large data sets:

- In the Advanced Filter window, after creating your filter criteria, click on the Order Results By tab.
- Under "When using large sets of data use this sort…", click the down arrow on the field and choose the sort order you want the filter results to use.
- For Get to work in the Large Data Navigator for the filter results sort, you must also select the same field that the sort uses from the Column Pick List and add it to the Columns to Sort By. **Note:** There can be only one field in the Columns to Sort By list for large data sets.

E. Searching in Large Data Sets

1. *Can I use Quick Search with Large Data Sets?*

Yes. Quick Search will search for the term you enter in all records in your data including large data sets.

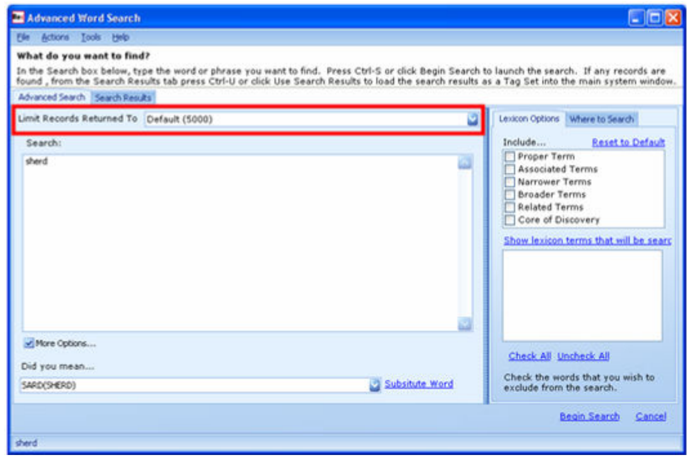
2. *How are the Quick Search results affected by large data sets?*

The results of a Quick Search are affected depending on the number of records found that contain the search term.

- If the number of records found that match a Quick Search is <u>less</u> than the "Maximum records to retrieve before paging" setting in System Options, all of the records will be downloaded to the workstation and appear in the list pane. The total number of records will appear in the lower right in the Status Bar. (No Paging is activated.)
- If the number of records found that match a Quick Search is <u>more</u> than the "Maximum records to retrieve before Paging" setting in System Options, Paging will be active. The total number of records found that match a Quick Search will appear next to Total Items in the Large Data Navigator (if it is active) as will the number of pages of results. The number of records in the current page will appear in the lower right in the Status Bar.

3. *How do I use Advanced Search with Large Data Sets and Paging?*

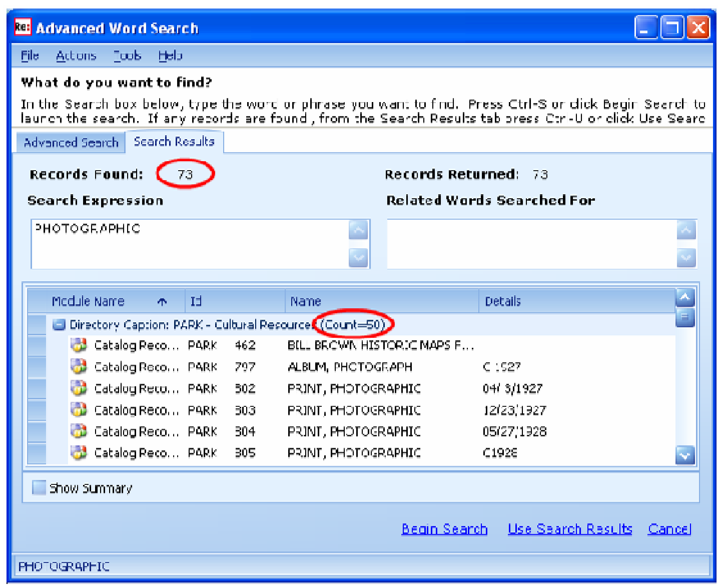
Advanced Search  on the Button Bar or Record Menu contains a Limit Records Returned To setting related to Large Data Sets and Paging.



4. *What is the Limit Records Returned To setting in Advanced Search?*

Limit Records Returned To determines how many records are loaded into the Search Results tab of the Advanced Word Search window. It is set by default to the "Default number of records to retrieve when performing a Filter or Advanced Search" setting in System Options.

When you launch an Advanced Search, the Search Results tab will show you how many records found that matched the search and it will load the number of records in the "Limit Records Returned To" in the grid. This shows you a sample of the records found that match the search.



Note: Notice above that the search found 73 records, but only 50 are displayed in the Search Results List. The Limit Records Returned To was set at 50 in this example.

5. *Can I change the Limit Records Returned To setting?*

Yes. To change the default setting for the number of records returned, select an entry from the drop down menu. This is the number of records that will be loaded on the Search Results tab. Your options are:

- 10
- 20
- 50
- 100

- 200
- 500
- 1000
- 2000
- 5000
- 10000

6. *Can I view all records found in an Advanced Search if the results exceed the number in the Limit Records Returned to setting?*

Yes. The Limit Records Returned To setting only affects the records loaded into the Search Results tab. When you click Use Search Results after performing an advanced search, all records found will become your visible data.

The Tag Set created from the search may have Paging activated depending on the following:

- If the number of records found that match an Advanced Search is less than the "Maximum records to retrieve before Paging" setting in System Options, all of the records will be downloaded to the workstation and appear in the list pane. The total number of records will appear in the lower right in the Status Bar.

- If the number of records found that match an Advanced Search is more than the "Maximum records to retrieve before Paging" setting in System Options, Paging will be active. The total number of records found that match an Advanced Search will appear next to Total Items in the Large Data Navigator (if it is active) as will the number of pages of results. The number of records in the current page will appear in the lower right in the Status Bar.

F. Other Functions Affected by Large Data Sets

1. *How is the Print List and Preview List affected by Large Data Sets and Paging?*

Print List and Print Preview on the Button Bar and File Menu will only print the records as they appear in the list pane for the number of records in the currently viewed page. The number of records in the page appears in the lower right of the Status Bar.

If you want to print the list for the other pages of records, you will have to navigate to the additional pages using the Large Data Navigator options and print them separately.

2. *How are the Export List options affected by Large Data Sets and Paging?*

The Export List choices under Import/Export on the File Menu will only export the records as they appear in the list pane for the number of records in the currently viewed page. The number of records in the page appears in the lower right of the Status Bar.

If you want to export all the visible records, you will have to navigate to the additional pages using the Large Data Navigator options and export them separately.