APPENDIX D: PUBLIC SEARCH

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I. INSTALLING PUBLIC SEARCH

A. Overview

1. *What is the Public Search feature?*

Public Search is a simple search interface for **ICMS**. It allows researchers or non-museum staff to perform searches of collection and archival data with little or no Re:discovery experience. They can view selected collection and archival data and related images, but they cannot edit or delete records.

Using the Public Search feature requires very little training. Public Search turns your computer into a local host by using your default Internet browser, as defined by your computer's registry. The Public Search interface is similar to search engines on the Internet and so is familiar to most users. Users search by field names or by the Word Search function.

You do not have to be connected to the internet to run Public Search. Your computer only needs to have the Public Search module, Internet Information Services component and an internet browser program installed.

2. *What do I need to install to use Public Search?*

Public Search is a separate installation from the main ICMS program installation and is not installed automatically. You will need to install the following components on any computer where you want to use Public Search:

- Internet Information Services (IIS) component of Windows
- Public Search component of ICMS
- an internet browser such as IE6.0 or higher

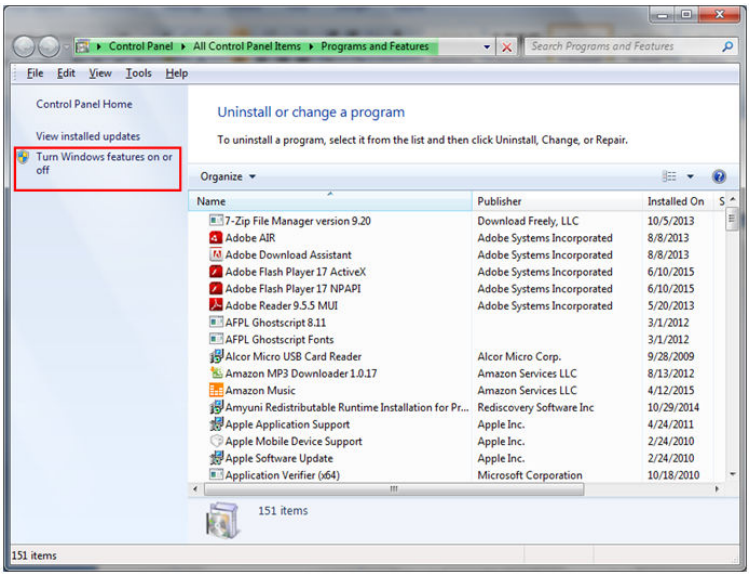
Note: Public Search does not have to be installed on every workstation. You may wish to set up just one or two workstations to run Public Search for staff, researchers, or public access.

B. Installing Public Search

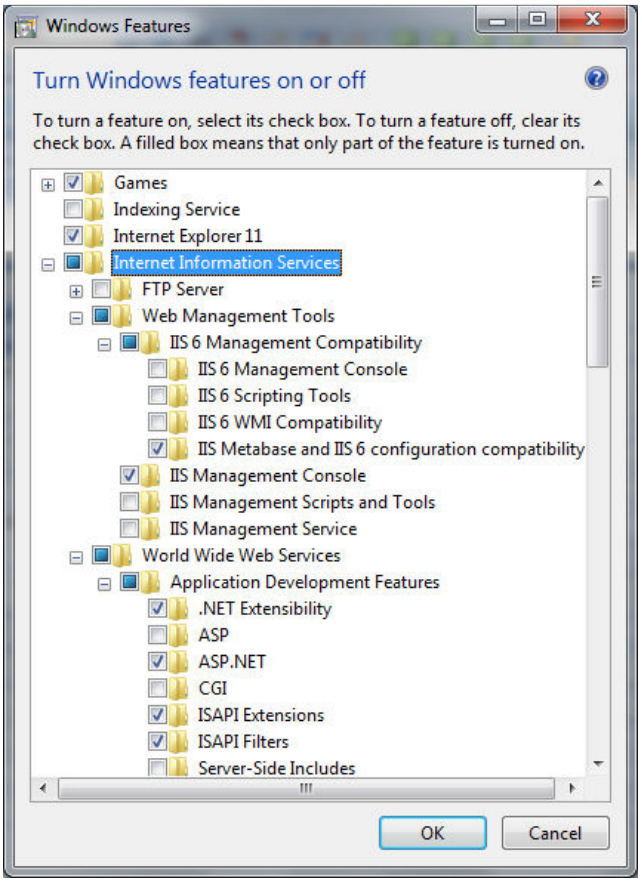
1. *How do I install the Internet Information Services component of Windows?*

To install the Internet Information Services (IIS) windows component, you may need your operating system installation disk. Before you begin, make sure that you have this disk available just in case you are asked for it during the installation. You will also need administrative privileges on the computer to install this component. (The following instructions are based on a Windows 7 system.)

- From your Start menu, go to Control Panel and select Programs and Features



- Click "Turn Windows features on or off" on the left.



- Check Internet Information Services and then expand it by clicking the plus (+).

  Note: If Internet Information Services is already turned on, it will have a check or black box next to it. However, there may be a few features that will still need to be turned on for ICMS's Public Search.

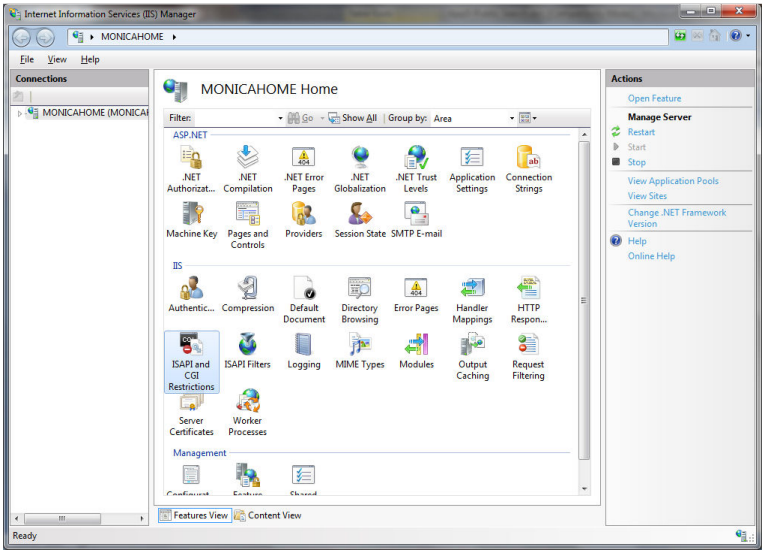
In addition to the standard options that come with IIS (these will already be selected in the list once you select the main Internet Information Services feature), also select the following:

- Under Web Management Tools, expand IIS 6 Management Compatibility. Select "IIS Metabase and IIS 6 configuration compatibility".

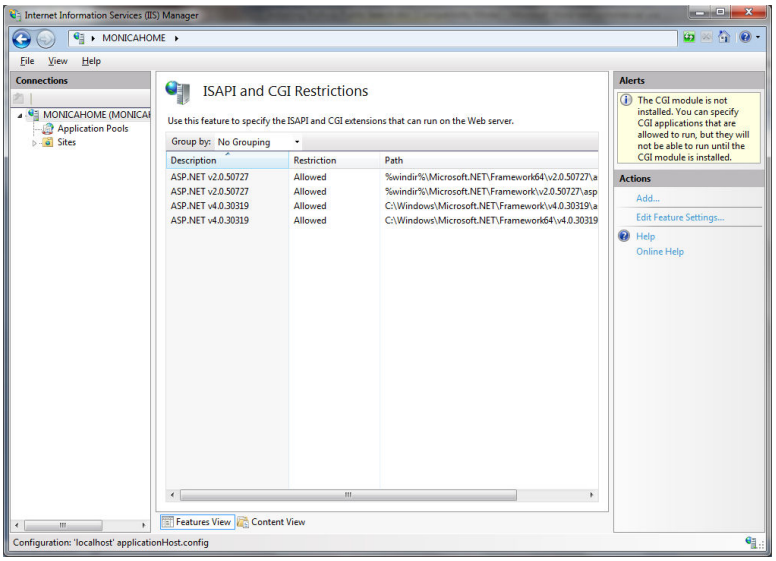
- Scroll down and expand World Wide Web Services. Under Application Development select "ASP.NET". Note: .Net Extensibility, ISAPI Extensions and ISAPI Filters will automatically be selected for you.

- Click OK. It will install and/or update the IIS feature. You will likely have to restart your computer after it has completed. Please do so if prompted before proceeding to the next section.

- Next, from your Start menu, go to Control Panel and select Administrative Tools. Double click Internet Information Services (IIS) Manager.

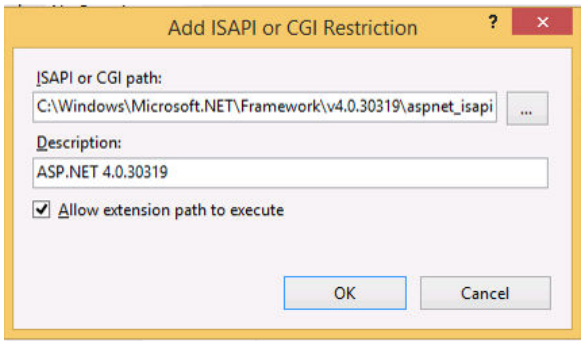


- Single-click the computer name under connections. In the center pane, under IIS, double-click ISAPI and CGI Restrictions. (Or highlight it and click Open Feature in the Actions pane on the right.)



- Check for ASP.NET v4.0.30319 in the list. If this is a 64-bit operating system, you should see 2 listed. Both should be 'Allowed'. If either or both are listed as 'Not Allowed', highlight it in the list and click [Allow] in the Actions pane on the right.

- If you do not see any ASP.Net v4.0.30319 listed, you will need to add it. Click Add in the Actions pane.



- In the first field, locate and select the following file: C:\Windows\Microsoft.NET\Framework\v4.0.30319\ aspnet_isapi.dll

- In the Description, enter: ASP.NET v4.0.30319

- Check the "Allow extension path to execute". Click OK.

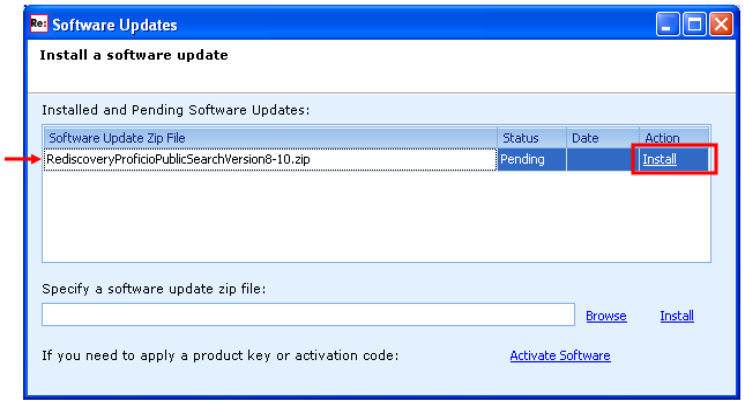
  Note: If this is a 64-bit computer, you will need to add a second entry. Follow steps 5-8 above, this time pointing to the following file:
  C:\Windows\Microsoft.NET\Framework64\v4.0.30319\ aspnet_isapi.dll
  The description can be the same.

IIS is installed and configured. You are ready to proceed with installing ICMS Public Search.

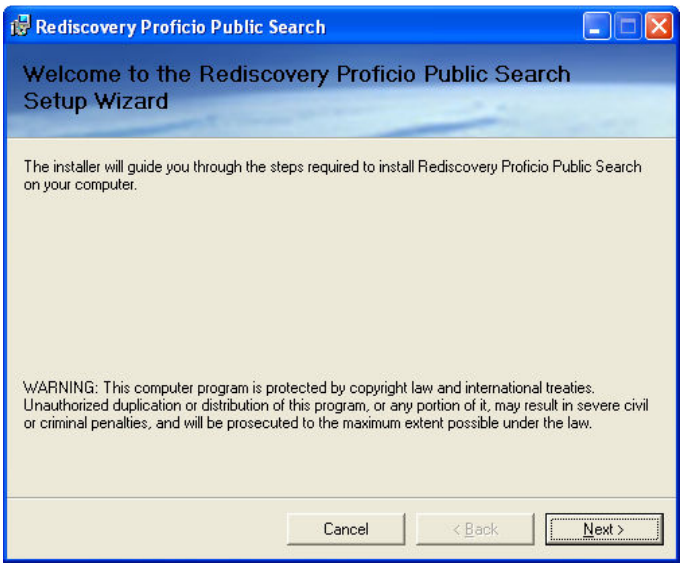
2. *How do I install the Public Search component of ICMS?*

You will use the Software Updates tool from within the program to install Public Search.

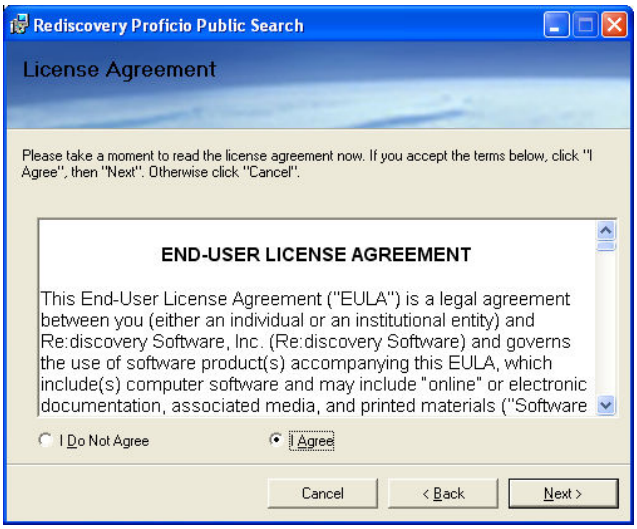
- Start ICMS and go to Tools and select Software Updates.



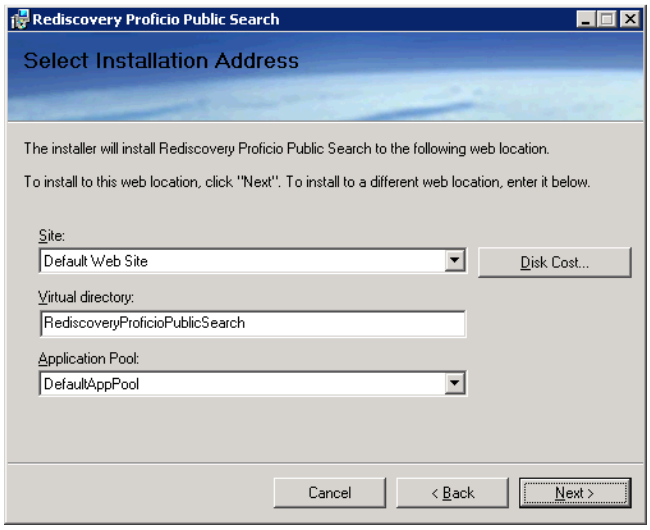
- Select RediscoveryProficioPublicSearchVersion8-10.zip and click the Install link in the Action column.



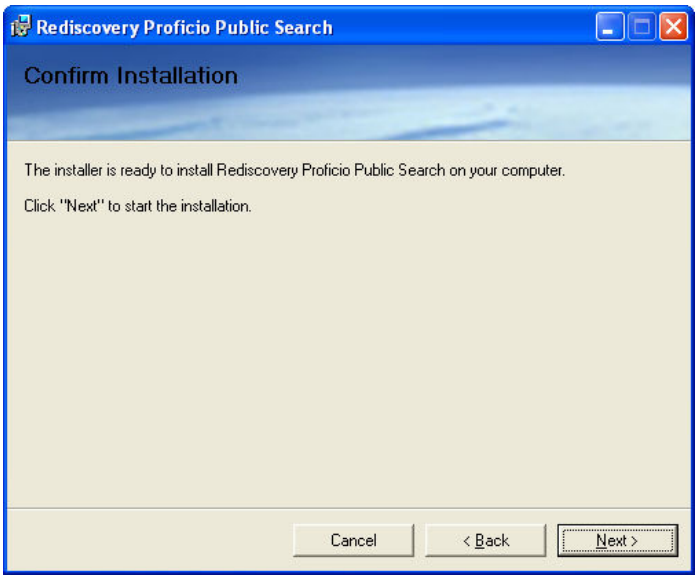
- Click Next.



- Select “I Agree” to the End-User License Agreement and click [Next].



- Accept the default entries for the Installation Address and click Next.

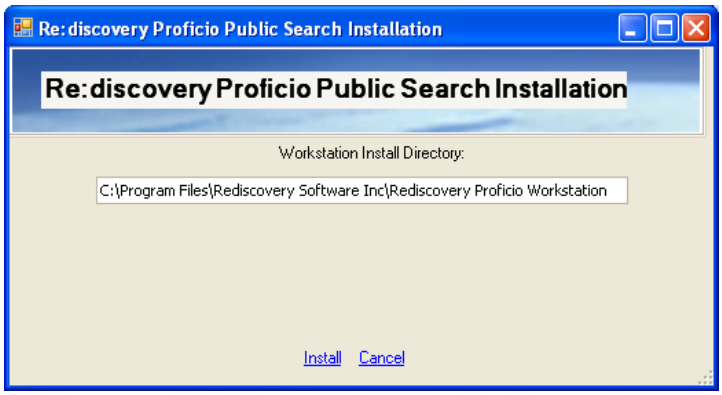


- Click [Next] to begin the installation.

- Enter a network user login account, domain, and password that have administrative rights on this computer. (Tip: You may change this after installation to another user account that has read-only rights to the c:\inetpub\wwwroot\RediscoveryProficioPublicSearch folder. See A.5 below for updating the user account.)

Note: If your network policy requires that passwords expire periodically, you will also need to update the Public Search User Access each time the password changes to be able to run public search. See A.5 below for updating the user account.

- Click Update Public Search User Access to continue.

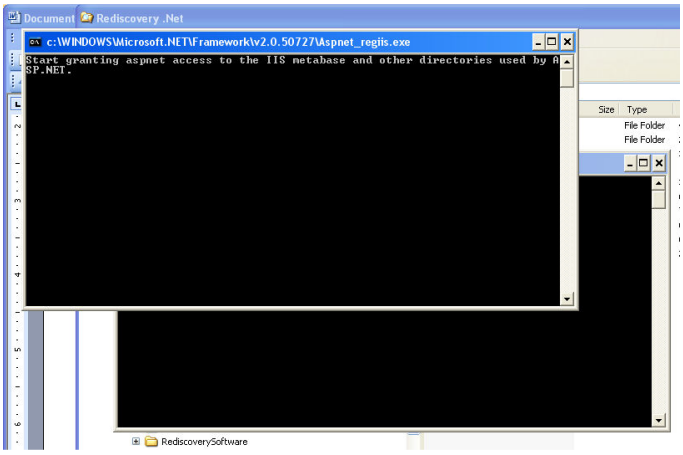


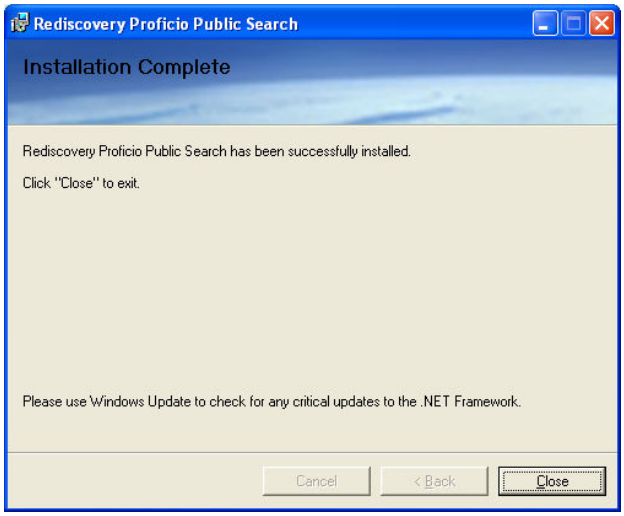
- Enter the path to your workstation's installation folder. This is usually:

  C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio Workstation

- Then, click the Install link.

- Two DOS windows will appear during the installation. Please wait while they complete their processes.





- After the DOS windows have closed, click Close in the Installation Complete window.

- You will need to update the security on the following folder with the user account you entered above. Open Windows Explorer or Computer and navigate to C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\Temporary ASP.NET Files

  - Right click the Temporary ASP.NET Files folder and choose Properties. Select the Security tab.

  - Click [Edit]. Then add the user assigned during the Public Search installation in above. Make sure to check Allow for Modify as well as Read & execute, List folder contents and Read. (Write will automatically be checked when you select Modify.)

    Note: If you have a 64-bit operating system, you will also need to update the security on that corresponding folder as well: C:\WINDOWS\Microsoft.NET\Framework64\v4.0.30319\ Temporary ASP.NET Files

Public Search is now installed.

To access public search, from within the program, select a directory in the Navigation Pane (the directory node only – e.g., PARK – Cultural Resources). Then from the Tools menu, select Public Search. In the Public Search window, click Start Public Search. See Section II below for further information on using Public Search.

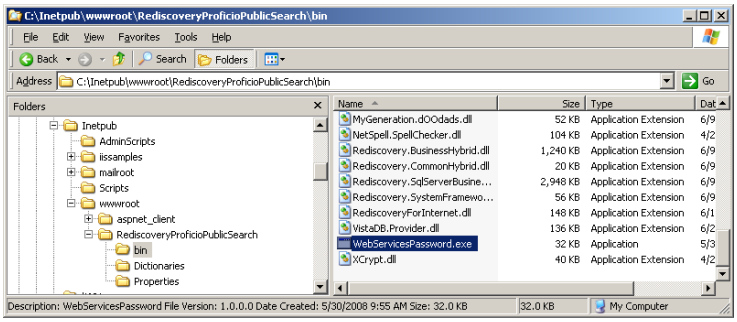
3. *How do I update the User Account for Public Search?*

If your network policy requires that user passwords expire periodically or you need to change the account that is used to access Public Search in Rediscovery, use the following instructions to update the user account and password for the Rediscovery Public Search. (Note: You will have to do this on each workstation that has Public Search installed.)

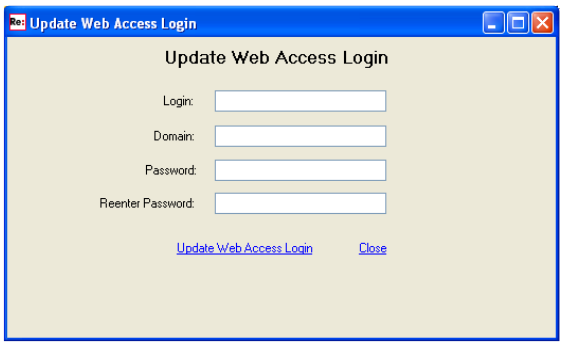
Note: This user account is a network or local user account used by IIS to access the program files. It is not an ICMS user account that you set up in User Security through the program. For Public Search security setup within the program see Section II.A below.

To update the account and password for your Public Search installation:

- In Windows Explorer, open the C:\inetpub\wwwroot\RediscoveryProficioPublicSearch\bin folder.

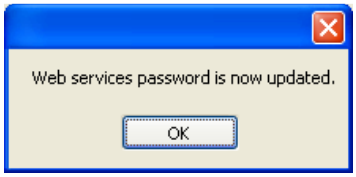


- Locate the WebServicesPassword.exe file and double click it.



- In the Update Web Access Login window, enter the Login and Domain for the user account. Note: This user account must have READ access to the C:\inetpub\wwwroot\RediscoveryProficioPublicSearch folder on this computer. Then enter the new Password and reenter it for verification.

- Click the Update Web Access Login link.



- You will get a confirmation that the web services password is now updated. Click OK.

- Then click Close in the Update Web Access Login window.

That completes the user account and password update for Public Search access. You will need to perform this same process on each workstation that has Public Search installed.

II. USING PUBLIC SEARCH

A. Overview

1. *What security rights do users need to access the Public Search feature?*

Users must have an **ICMS** User ID and a password to access Public Search. Assign the User ID and password from the User Security option on the Tools menu.

To assign a User ID and password:

- Go to User Security on the Tools menu or under system on the Navigation Pane, and click on the Add button on the button bar or select Add New Record on the Edit menu.

Note: You must have full security rights to access the Set User Security screen.

- On the Main Information page, complete the User ID, Full Name, and User Type fields.
- Click Set Password and enter a new password. Then click Set Password to save it.
- Go to the User Security Information page and check Public Search listed under Specific Rights. Do not assign any other security rights from the list if you only want this user to have Public Search.

Note: You may want to set up a general access User ID (e.g., "Public") that can be used by anyone needing Public Search access only.

- Click Save and Close to save the new user profile.

Refer to Section VI of Chapter 9 for information on security.

2. *Can I limit Public Search access to specific directories?*

Yes. You can limit Public Search to only specific directories. You do this through the user's security profile. When setting up a new User Security (or modifying an existing one):

- On the User Security Information page, do not check Public Search for the Global (all directories) option. Leave everything unchecked.
- When adding a new user, save the new user record and then modify it.

Note: You must be in Modify mode to access the individual directories on the User Security Information page. You cannot access them in Add mode.

- On the User Security Information page, select the directory on the left that you want this user to have access to Public Search and click the Add link in the upper right.
- Check the Public Search option under Specific Rights.
- Select any other directories that you want to allow Public Search and do the same thing.
- When complete, click Save and Close.

All directories that you gave specific Public Search rights will be accessible through Public Search by this user.

3. *How much collection information is available through Public Search?*

Public Search users can view all the catalog records in any Collections Management and Archives directory. They do not have access to accession records, names and addresses records, or other associated modules.

The collections manager chooses which fields on the catalog or archival record are visible through Public Search.

4. *How do I choose the fields I want to display in Public Search?*

You can choose the fields you want to display in Public Search by using the Public Search Configuration option under Tools on the Directory page for each directory, or from System Options on the Tools menu. The field choices apply only to the Detail View of the record. Refer to Section III below for specific information on selecting public search fields.

You can include or exclude any of the available catalog or archives data fields for each directory.

Note: If you don't set the fields, Public Search will contain the default fields. A list of the default fields appears in Section III below.

B. Using Public Search

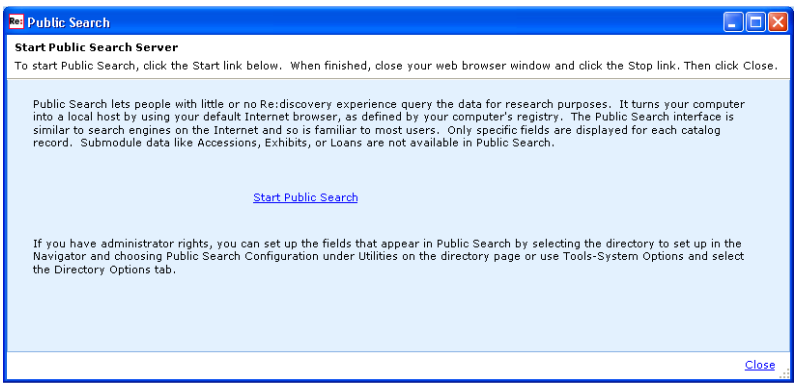
1. *How do I access the Public Search feature?*

To access Public Search:

- Select a directory node in the Navigation Pane that you want to search. **Note:** you must select the main directory node (e.g., PARK – Cultural Resources), not catalog or collection records within the directory.

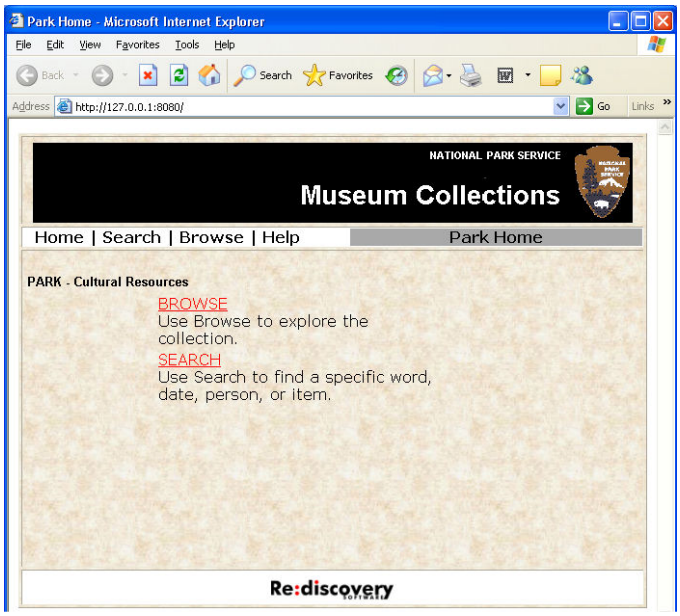
- Next, on the Tools menu, select Public Search. The Public Search window will open.

Note: If you do not see the Public Search option on the Tools bar, you have not selected the directory node in the Navigation Pane. Make sure that you are viewing the Directory page and not catalog or associated module records.



Note: While public search is running, you cannot access other parts of the system.

- Click Start Public Search to begin searching. The Home Page for the directory will open in an Internet Explorer window.



2. *What Public Search options are available?*

The Public Search options available to you are:

- **BROWSE**: explore the collection by different sort fields.
- **SEARCH**: Enter keyword(s) or limit your search to a specific field to find records with a specific word, date, person or item.

Note: At any point, you can click Help in the title band to learn how to use the various features of Public Search.

3. *How do I use the Browse option?*

To use the Browse option, click BROWSE on the Home Page. The Browse page will open.

Collections

- For the Collections directories, BROWSE allows you to choose between the Cultural Resources and Natural History Databases, if matching

directories exist (e.g., PARK – Cultural Resources and PARK – Natural History).

- "Organized by" lets you organize the database by any of several fields. For example, you may want to page through the catalog records by Object Name to learn what is in the collection. In the Organize by box, select one of the following fields from the pull-down menu on which to sort the collection:

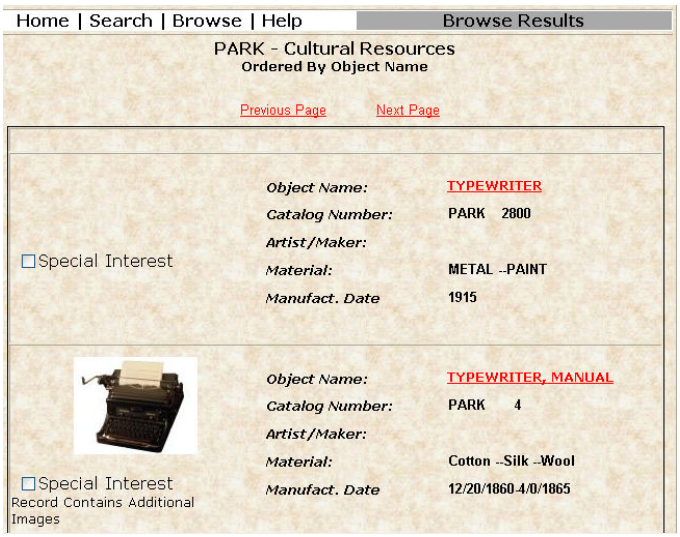
  Cultural Resources
  By Catalog Number
  By Manufact. Date (Manufacturer Date)
  By Accession Number
  By Class 1 (ARCHEOLOGY, HISTORY, ETHNOLOGY)
  By Object Name
  By Artist/Maker
  By Eminent Figure
  By Eminent Org
  By Key Descript(ion)
  Only Images (use to list only those records that have an image)

  Natural History
  By Catalog Number
  By Accession Number
  By Sci. Name
  By Collector
  By Class 1 (BIOLOGY, GEOLOGY, PALEONTOLOGY)
  By Collection Date
  By Eminent Figure
  By Eminent Org
  By Identified By
  By Identified Date
  By Common Name
  Only Images (use to list only those records that have an image)

- "Browse starting with:" allows you to start looking at the entire database from a particular letter, group of letters, or word, such as 'A,' 'arr,' or 'arrow' for the organization you selected. If BROWSE doesn't find an exact match, it will go to the nearest match. For example, if you entered 'brac' and there isn't a word beginning with 'brac,' it will go to the nearest match, such as 'brad.' If you leave this field blank, the browse results will start at the beginning of the database in the organization you selected.

- "Records per page" allows you to change the number of records that are loaded to each page by entering a new number in the box.

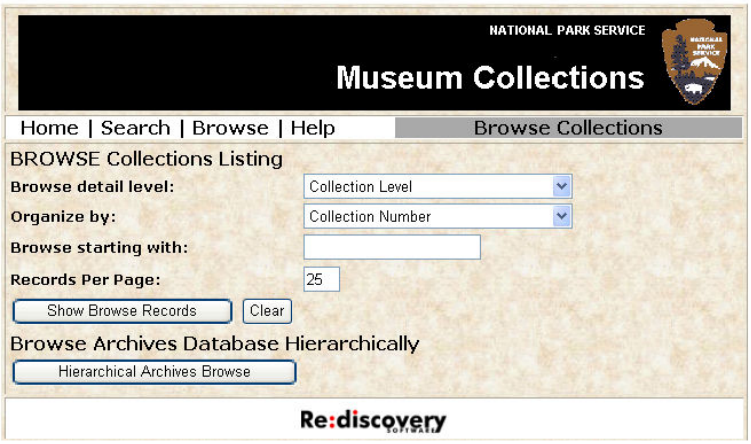
- Once you have selected your browse options, click **Show Browse Records**. The Browse Results page will open.



- The Browse Results page shows a predefined short list of fields per record and a thumbnail of the first image (if available) attached to the catalog record. To view a more detailed description of the record and additional images, click on the red object name link.

- To browse through the pages, click Previous Page or Next Page.

Archives



- "Browse detail level" allows you to choose the archival level to browse in the 4-level archives.

  Collection Level
  Series Level
  File Unit Level
  Item Level

- "Organize by" allows you to organize that level by a specific sort field.

  All Levels
  Collection Number
  Title
  Catalog Number
  Accession Number
  Dates

- "Browse starting with" allows you to start looking at the database level (collection, series, file unit, item) from a particular letter, group of letters, or word, such as 'P,' 'pho,' or 'photograph.'

- "Records Per Page" allows you to change the number of records that are loaded to each page by entering a new number in the box.

- Click **Show Browse Records** to browse the archives by the level and field you chose.

You can also browse all levels of the archives collection hierarchically.

- To browse all levels of the archives in a hierarchical arrangement, click the **Hierarchical Archives Browse** button at the bottom of the Browse Archives page. The Hierarchical Browse allows you to view all levels of the archives database with each level indented under its corresponding parent record.

- Click on the + in front of an entry to expand it and view the associated subrecords. To view the details of a specific entry, click on the blue title link for that record.

4. *Can I change the sort fields that are available for each directory?*

No. The sort fields are predefined and cannot be changed.

5. *Can I change the fields that display on the results page?*

No. The results page has 5 predefined fields that appear for each record.

6. *How do I use the Search option?*

This option will search all records and all fields in the selected directory. SEARCH will find only those records that contain the word or phrase that you entered. For example, if you want to find all the baskets in a unit collection, enter basket.

To use the Search options available in Public Search, click SEARCH on the Home Page or Title Band. The Search screen will open.

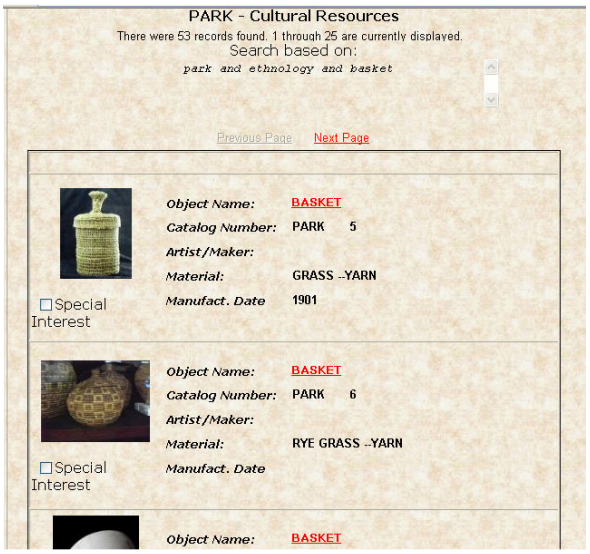
- Enter a word or phrase in the search field.

Note: if you want to keep phrases together, use quotes around them. Otherwise, multiple words will be searched with an AND condition between the words.

- "Records per page" allows you to limit the number of records loaded per page.

- You also have the option to search all records or only records with images. Select one of the options from the pull down menu: "Select all records" or "Select only records with images"

- After entering your search words, click the **Search** button to begin your search. The Search Results window will open listing the records found in your search.



- The number of records found and your search words are displayed at the top.

- To view expanded information about a particular record, click on the name link for that record.

- Use Previous Page and Next Page to scroll through the pages of the results.

7. *How can I refine my search?* You can refine your search by using the examples below:

- * or ? (wildcards): Use asterisks and question marks to make your search as general as possible. This is helpful when you are unsure of the spelling.

  Examples: **fac*** will find *face, facade, factory, faculty*, etc.

  ***ington** will find *Arlington, Paddington, Washington*, etc.

  Use question marks in place of letters.

  Min?r will find *Miner* and *Minor*.

  Acet??? will find all 7-letter words starting with 'Acet', such as *acetate* or *acetosa*, but not *acetabulum*.

- *OR*: Use *or* to search for records that contain either of the conditions you request.

  Example: linen or cotton

- *AND*: Use *and* when you want to find records that contain both words. You can also use the + (plus) in place of AND.

  Examples: ethnology and basket
  figurine + ceramic

- *NOT*: Use *not* when you want to find records that exclude a word. You can also use the - (hyphen) in place of NOT.

  Examples: retouched and flake not utilized (will find all the retouched flakes excluding the utilized/retouched flakes)

  Virginia - "West Virginia" (will find records that contain *Virginia*, but not records that contain *West Virginia*)

- *TO*: Use *to* to search for an alphabetic or alpha-numeric range.

  Examples: B TO F (will find every word that begins with B, C, D, E, and F)

  3 TO 49 (will search for every word (or string of characters) that begins with 3 through 49 so it will find *30003, 48FN6, 47", 6, 10/31/1963* (because of the 31 in the date), etc.

- Date Search: You can use two formats to search for a range of dates.

Examples: **1959..1962** will retrieve all records that include the years 1959, 1960, 1961, and 1962.

19th century will find records that include any year from 1800 to 1900.

- Using parentheses allows you to combine terms to clarify a search.

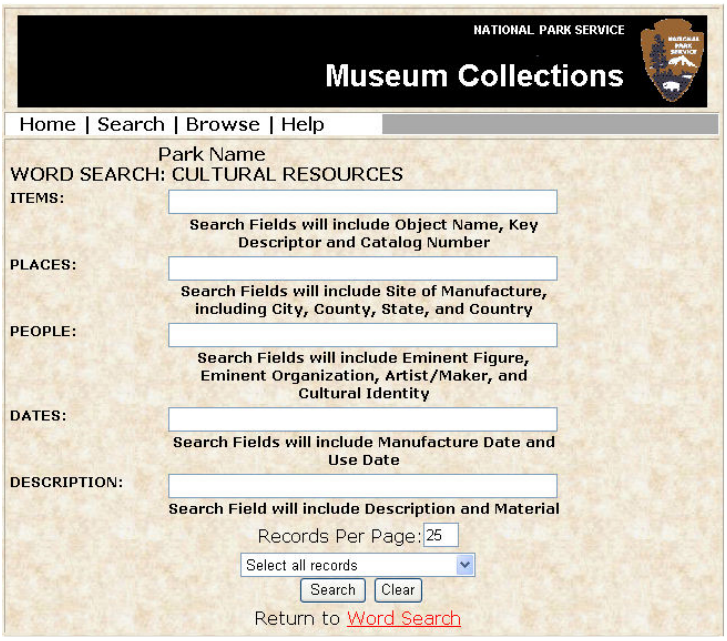
  Example: (triangular or trapezoidal) and knife (you will find all knives described as triangular or trapezoidal)

You can also limit your search to a specific field. On the Search page, click the red here link at the end of the sentence about limiting your search to a specific field. Locate the field name in the list and use the code next to it in your search. For example, to search for baskets in the object name field only, type "f=object" in the search box.

Certain words are excluded from all searches because they are commonly occurring words. To see the list of excluded words, click the red here link after the excluded words sentence on the search page.

8. *What is the Advanced Search option?*

Use ADVANCED SEARCH to find a specific item, place, person, or description. Click on the Advanced Search link at the bottom of the Search page and the Advanced Search page will open.



This option will search only those fields that are noted below the entry box. For example,

Cultural Resources

ITEMS will search only the Object Name, Key Descriptor and Catalog Number fields in the database.

PLACES will search only the Site of Manufacture field which includes the City, County, State and Country.

PEOPLE will search Eminent Figure, Eminent Organization, Artist/Maker and Cultural Identity fields.

DATES will search both the Manufacture Date and Use Date fields.

DESCRIPTION will search the Description and Material fields.

Natural History

SPECIMEN will search the Scientific Name field which includes the Genus, Species, Species Modifier and Species Year, as well as the Common Name field.

PLACES will search the County and State fields.

PEOPLE will search the Collector, Eminent Figure and Eminent Organization fields.

DATES will search the Collection Date.

CATALOG NUMBER will search the numeric part of the Catalog Number.

Archives

TITLE will search only the Title field on any or all levels.

COLLECTION# will search the Collection Number, Series Number, File Unit Number and Item Number fields.

CREATOR will search the Creator field on all levels except Series.

CATEGORY will search the Category field on file unit and item level only.

DATES will search Bulk Dates, Inclusive Dates and Dates fields.

COLLECTION HISTORY will search History, Scope, Associated Material and Provenance fields.

CONTENTS will search Organization/Arrangement, Finding Aids, Notes, Summary Notes, Physical Description and Physical Characteristics fields.

SUBJECT TERMS will search Reference Terms, Index Terms, and Specific Material fields.

- Enter a term in the field you wish to search. **Note:** If you enter terms in more than one field, these will be searched using an AND condition. The records found must match all field entries.
- Select how many records to return per page.
- Select whether to search all records or only those records with images. **Note:** For Archives you can also select whether to search All Levels or individual levels only.

- Click the **Search** button to start the search.

9. *How can I switch to the paired Collection directory search page?*

If you are in a Collection directory that has a corresponding Cultural Resources or Natural History directory (e.g., PARK – Cultural Resources and PARK – Natural History), the main Word Search page for the current directory will have either Cultural Resources Search or Natural History Search at the bottom of the page. Click on the available link. The word search page for the other directory will open.

Note: Only Collection directories have this option. If you wish to switch to an Archives directory or another directory that isn't paired with the current directory, see Section B.13 below.

10. *What is the Special Interest check box on the Browse Results and Search Results pages?*

The Special Interest check boxes allow you to select specific records from the browse results and search results pages that you would like to compare. You can combine these from various searches and browse results in the same session. Once you have checked the items that you want to view together, you will have the option to combine these special interest items into one list.

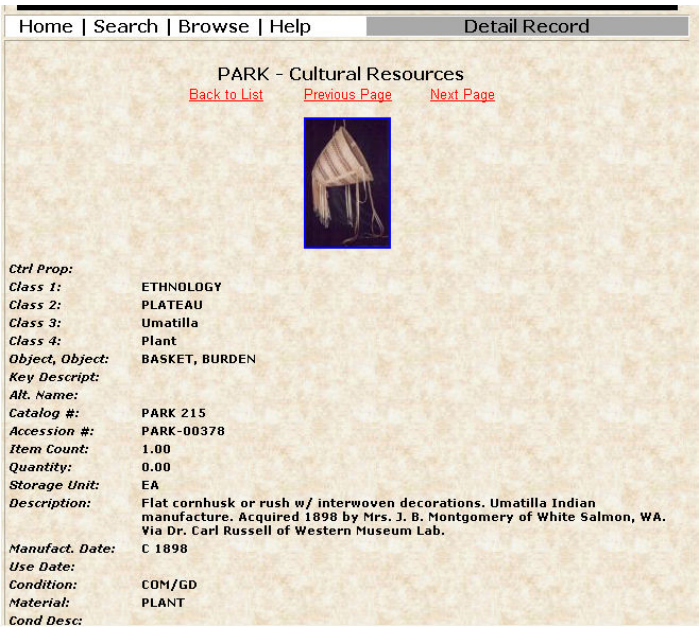
Show Special Interest Items changes the results list to show only those records that you selected as special interest. These can be combined from both browse results and search results lists during the same public search session.

Clear Special Interest Items will de-select all special interest items and return you to the Home Page for the directory.

11. *What options are available on the Detail view of the record?*

From the Browse Results, Search Results or Hierarchical Browse (for archives) pages, you can click on the record link (either object name, scientific name or title) to view a more detailed view of the record.

Note: This is the only page that you can select the fields that are displayed. See Section III below for configuring these fields.



- Use Previous Page to scroll back through the list one record at a time.
- Use Next Page to scroll forward through the list one record at a time.
- Use Back to List to return to the results page.

12. *Can I zoom an image to see a larger view?*

Yes. To zoom an image, click on the image in the detail view of the record.

Note: When you want to return to the record from the Zoomed Image page, use the Back button on your browser window.

13. *How do I access another directory for Public Search?*

To search in a different directory,

- Close the internet browser window by clicking the red X. You will return to the Rediscovery Public Search window.

Note: You do not have to exit the current directory if the one you want to go to is one of the paired Cultural Resources or Natural History directories. See B.9 above.

- In the Rediscovery Public Search window, click Stop Public Search, then click Close.
- In the Navigation Pane, select another directory node that you want to explore.
- Go to the Tools menu and choose Public Search.
- Click Start Public Search.

Your internet browser window will open in Public Search for the new directory you selected.

14. *How do I exit Public Search?*

To exit Public Search,

- Close the internet browser window by clicking the red X. You will return to the Rediscovery Public Search window.
- In the Rediscovery Public Search window, click Stop Public Search.
- Then click Close.

You are returned to the main screen for the program.

III. PUBLIC SEARCH CONFIGURATION

A. Overview

1. *What is the Public Search Configuration option?*

Public Search Configuration allows you to add, delete, and rearrange the expanded list of fields on the Detail view in Public Search.

2. *Do I need special security rights to use this function?*

Yes. You must have System Administrator rights in your security profile to change the public search configuration. Refer to Section VI of Chapter 9 for User Security information.

3. *Do I need to choose Public Search fields for each directory?*

No. Each directory has a preset list of fields when it is created. You only need to configure the Public Search fields if you want to add, delete or rearrange them.

4. *Can I change any other fields in Public Search?*

No. Only the fields displayed on the Detail view for a record can be changed.

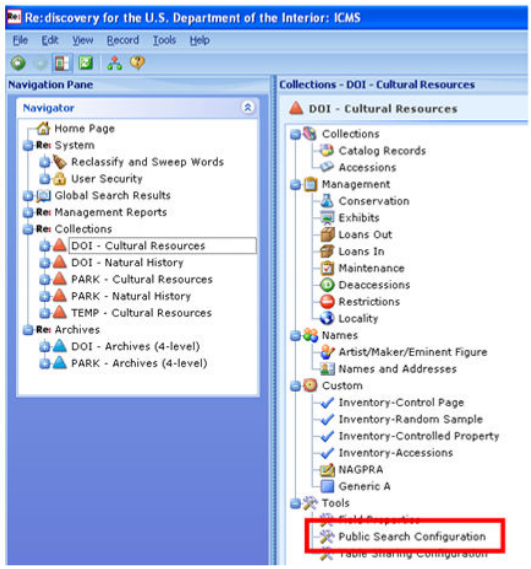
B. Configuring Public Search Fields

1. *How do I access the Public Search Configuration?*

There are two ways to access the Public Search Configuration for a directory.

From the Directory Page:

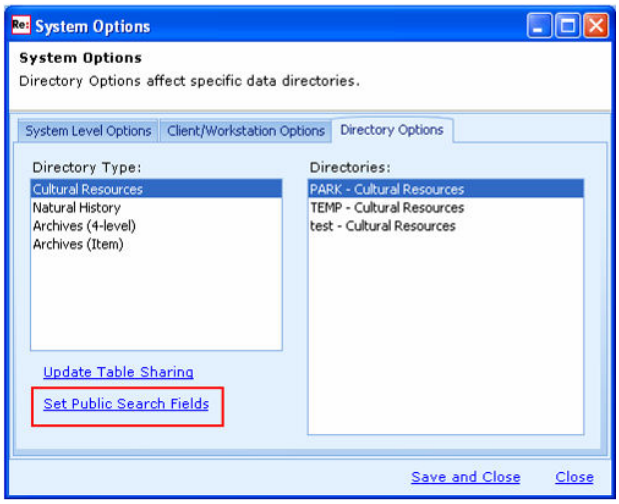
- Select the directory in the Navigation Pane that you want to change the Public Search Detail view so that the Directory Page appears in the window on the right.



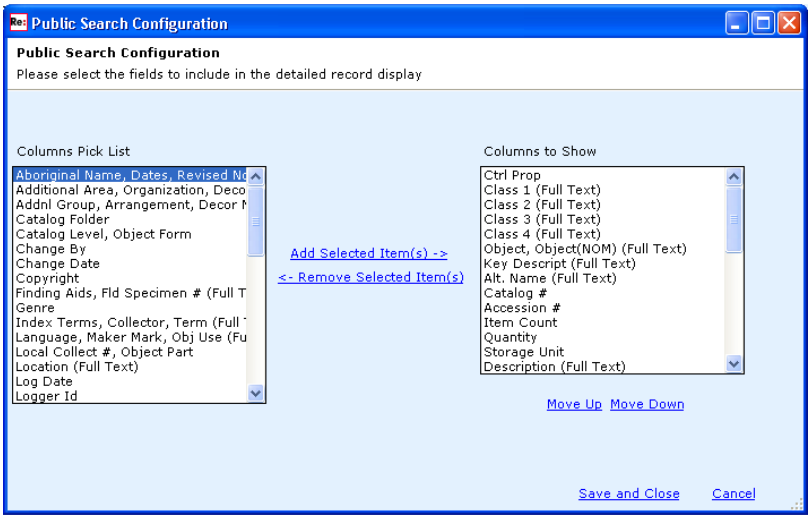
- Under Tools, double-click the Public Search Configuration option to open the Public Search Configuration window.

From System Options:

- On the Tools menu, choose System Options.
- In the System Options window, go to the Directory Options tab.



- Select the Directory Type on the left to view the list of Directories of that type.
- Highlight the directory name in the list of Directories on the right.
- Click Set Public Search Fields to open the Public Search Configuration window.



2. *How do I add Public Search fields?*

To add a field to the detail view,

- Highlight one or multiple fields in the "Columns Pick List"

Note: To select more than one field in the list, press and hold Ctrl and click on the fields you want to add.

- Click Add Selected Item(s)

All fields selected will be added to the bottom of the "Columns to Show" list.

3. *How do I remove Public Search Fields?*

To remove one or multiple fields from "Columns to Show", highlight the field(s) in the list and click Remove Selected Item(s).

4. *How do I rearrange the field order?*

To change the order of the fields in "Columns to Show", highlight the field and use Move Up and Move Down to move it to another position in the list.

For Archives directories, you can select the field list for each level. There is a pull down menu above the Columns Pick List for Archives directories where you select the level: Collection Level, Series Level, File Unit Level, Item Level. Select the fields that will display for each archival level. Once you have selected the fields for one level, click Save that appears above the Columns to Show list before selecting the next level.

5. *How do I save the list of fields I chose for Public Search?*

To save the changes to the field list once you have added, removed and/or rearranged the Public Search fields,

- click Save and Close
- click OK to the "Your changes have been saved" message.
- Return to Section B.1 to select another directory and change its Public Search fields.

6. *What are the default fields for the directory types?*

The default fields for each directory type are:

Cultural Resources

Accession #	Field Site #
Alt Name	Hist/Cult Per
Artist/Maker	Identified by
Catalog Date	Ident Date
Catalog #	Item Count
Cataloger	Key Descript
Class 1	Manufact Date
Class 2	Material
Class 3	Measurements
Class 4	Object
Cond Desc	Origin
Condition	Place of Manuf
Ctrl Prop	Quantity
Cult. of Use	Reproduction
Cultural ID	Site Name
Description	Storage Unit
Eminent Figure	Use Date
Eminent Org	

Natural History

Catalog #
Class 1
Class 2 (Kingdom)
Class 3 (Phylum)
Class 4 (Class)
Collection #
Collector
Common Name
Description
Family
Item Count
Order
Quantity
Sci Name
Storage Unit

Archives

Each archival level has a different set of default fields.

Collections Level

Accession #
Bulk Dates
Catalog #
Collection Nbr
Collection Title
Creator
Extent
Find Aids
History
Incl Dates
Location
Orgn/Arrgn
Scope

Series Level

Accession #
Bulk Dates
Catalog #
Collection Nbr
Extent
History
Incl Dates
Location
Orgn/Arrgn
Scope
Series Nbr
Series Title

File Unit Level

Accession #
Assoc. Matl
Catalog #
Category
Collection Nbr
Creator
Dates
Extent
File Unit Nbr
Ident. By
Location
Map Source
MOR/POV, Language
Phy Desc
Phys Char
Purpose/Dimensions
Series Nbr
Sp Matl
Summ Note
Title
User 1, Ref Terms
User 2, Index Terms
User 3, Addl Numbers, Captions
User 4
User 5

Item Level

Accession #
Catalog #
Category
Collection Nbr
Creator
Dates
Extent
File Unit Nbr
Item Nbr
Location
Notes, Summ Note
Phys Char
Phys Desc
Series #
Title