CHAPTER 5: PRINTING AND REPORTS

I. REPORTS AND FORMS

II. PRINT LIST PANE

III. QUICK REPORT

IV. FULL VIEW

V. PROFICIO REPORTS DESIGNER

Table of Reports and Forms Listed by Report

Note: NPS forms and reports begin with '10-'. For other bureau units, use the forms or reports that begin with 'DOI' or your bureau's acronym. Some reports and forms are not bureau specific and can be used department-wide.

Report Name	**Module**	**Description**
10-95 Accession Receiving Report	Accessions	
10-95 Accession Receiving Report – Blank.docx	Accessions	Word Document, blank form
10-95c Accession Receiving Report Continuation	Accessions	
10-95c Accession Receiving Report Continuation – Blank.docx	Accessions	Word Document, blank form
10-96 Folder List.docx	Archives-any level	Word Document
10-97 Temporary Removal Slip	Catalog Records	
10-98 Blank Incoming Loan Agreement.docx	Loans In	Word Document, blank form
10-98 Incoming Loan Agreement	Loans In	
10-98a Conditions for Incoming Loans.docx	Loans In	Word Document
10-98b Incoming Loan Extension	Loans In	
10-98b Incoming Loan Extension – Blank.docx	Loans In	Word Document, blank form
10-98c Incoming Loan Agreement Continuation	Loans In	
10-99 Conveyance Agreement	Deaccessions	
10-99 Conveyance Agreement - Blank.docx	Deaccessions	Word Document, blank form
10-127 Blank Outgoing Loan Agreement.docx	Loans Out	Word Document, blank form
10-127 Outgoing Loan Agreement	Loans Out	
10-127a Conditions for Outgoing Loans.docx	Loans Out	Word Document
10-127c Outgoing Loan Agreement Continuation	Loans Out	
10-254 CR Museum Catalog Record	Catalog Records	For CR only.
10-254b NH Museum Catalog Record	Catalog Records	For NH only.
10-255 Accession Folder Cover Sheet.docx	Accessions	Word Document
10-417 List of Objects	Catalog Records	
10-417 List of Objects.docx	Catalog Records	Word Document, blank form
10-500 Vertebrate Wet Specimen Label	Catalog Records	For NH only
10-500T Vertebrate Web Specimen Label	Catalog Records	For NH only, prints in a single column.
10-501 Vertebrate Specimen	Catalog Records	For NH only
10-501c Vertebrate Specimen-columns	Catalog Records	For NH only, prints in multiple columns.
10-502 Skull vial-box label	Catalog Records	For NH only
10-502c Skull vial-box Label-columns	Catalog Records	For NH only, prints in multiple columns.
10-503 Invertebrate Specimen Label	Catalog Records	For NH only
10-504 Geology Collection Label	Catalog Records	For NH only
10-504c Geology Collection Label-columns	Catalog Records	For NH only, prints in multiple columns.
10-505 Paleontology Label	Catalog Records	For NH only

Report Name	Module	Description
10-505b Paleontology Label-small	Catalog Records	For NH only
10-505c Paleontology Label-columns	Catalog Records	For NH only, prints in multiple columns.
10-506 Wet Plant Specimen Label	Catalog Records	For NH only
10-507 Invertebrate Label	Catalog Records	For NH only
10-507c Invertebrate Label-columns	Catalog Records	For NH only, prints in multiple columns.
10-508 Egg Box Label	Catalog Records	For NH only
10-509 Insect Label	Catalog Records	For NH only
10-509 Insect Label-Extra Small	Catalog Records	For NH only
10-509c Insect Label-Columns	Catalog Records	For NH only, prints in multiple columns.
10-509c Insect Label-Columns-Extra Small	Catalog Records	For NH only, prints in multiple columns.
10-509c Insect Label-Columns-Extra Small.docx	Catalog Records	For NH only, Word Document for blank labels
10-509T Insect Label	Catalog Records	For NH only, prints in single column.
10-510 Annotation Label	Catalog Records	For NH only
10-511 Mineral Collection Label	Catalog Records	For NH only
10-512 Herbarium Label	Catalog Records	For NH only
10-512 Herbarium Label.docx	Catalog Records	For NH only, Word Document for blank labels
10-637 Object Condition Report	Catalog Records	
10-640 Outgoing Loan Folder Cover Sheet	Loans Out	
10-640 Outgoing Loan Folder Cover Sheet – Blank.docx	Loans Out	Word Document, blank form
10-641 Outgoing Loan Extension	Loans Out	
10-641 Outgoing Loan Extension – Blank.docx	Loans Out	Word Document, blank form
10-643 Deaccession Form	Deaccessions	
10-643 Deaccession Form - Blank.docx	Deaccessions	Word Document, blank form
10-644 Deaccession Folder Cover Sheet.docx	Deaccessions	Word Document
10-645 Separation Sheet.docx	Archives-any level	Word Document
10-830 Deed of Gift	Accessions	
10-830 Deed of Gift – Blank.docx	Accessions	Word Document, blank form
10-830c Deed of Gift Continuation	Accessions	
10-830c Deed of Gift Continuation - Blank.docx	Accessions	Word Document, blank form
ACCCAT	Catalog Records	Prints the accession source and count with a list of objects from the accession.
Accession List	Accessions	Prints the acquisition date, source, number of catalog records and list of catalog records for the current directory.
Accession List	Catalog Records	Create a tag set or group records by accession. Prints accession information with a list of the objects.
Accession Total Cataloged	Catalog Records	Prints total number of catalog records and total of item counts for each accession. Run on all visible or a group of catalog records.
Accession Worksheet.docx	Accessions	Word Document
Archbag	Catalog Records	For CR only, archeology bag label
Archeology Label	Catalog Records	For CR only
Archeology Worksheet.docx	Catalog Records	For CR only, Word Document
Archives Worksheet.docx	Archives-Collection level	Word Document

Report Name	Module	Description
Archives Worksheet-Cultural Resources.docx	Catalog Records	For CR only, Word Document
BIA CR Museum Catalog Record	Catalog Records	
Biology Worksheet.docx	Catalog Records	For NH only, Word Document
BOR Accession Folder.docx	Accessions	Word Document
BOR Accession List.docx	Accessions	Word Document
BOR Accession Receipt	Accessions	
BOR Accession Receiving Report	Accessions	
BOR Accession Receiving Report Continuation	Accessions	
BOR Accession Register	Accessions	Prints the acquisition date, source, number of catalog records and list of catalog records for the current directory.
BOR Collection Use Record	Names and Addresses	
BOR Collection Use Record Continuation	Names and Addresses	
BOR Contact Information for Accountable Officers	Names and Addresses	
BOR Contact Information for Custodial Officers	Names and Addresses	
BOR Deaccession Folder.docx	Deaccessions	
BOR Deaccession Form	Deaccessions	
BOR Deaccession Log	Deaccessions	
BOR Deed of Gift Continuation	Accessions	
BOR Duplication Form	Names and Addresses	
BOR Exchange Agreement	Deaccessions	
BOR Exchange Agreement Continuation	Deaccessions	
BOR Incoming Loan Agreement	Loans In	
BOR Incoming Loan Agreement Continuation	Loans In	
BOR Incoming Loan Extension	Loans In	
BOR Incoming Loan Extension-Blank.docx	Loans In	Word Document, blank form
BOR Incoming Loan Folder.docx	Loans In	Word Document
BOR Incoming Loan List	Loans In	
BOR Incoming Loan List.docx	Loans In	Word Document, blank form
BOR List of Objects	Catalog Records	
BOR List of Objects.docx	Catalog Records	Word Document
BOR Object Condition Report	Catalog Records	
BOR Object Temporary Removal Slip	Catalog Records	
BOR Outgoing Loan Agreement	Loans Out	
BOR Outgoing Loan Agreement Continuation	Loans Out	
BOR Outgoing Loan Extension	Loans Out	
BOR Outgoing Loan Folder.docx	Loans Out	Word Document
BOR Outgoing Loan List.docx	Loans Out	Word Document
BOR Repatriation Agreement	Deaccessions	
BOR Repatriation Agreement Continuation	Deaccessions	
BOR Researcher Registration Form	Names and Addresses	
BOR Visitor Log	Names and Addresses	
BOR Visitor Log Conditions	Names and Addresses	
Catalog Number Log	Catalog Records	
CMR Accession Verification	Accessions	

Report Name	Module	Description
CMR Accession Verification-Count by Accession	Accessions	Includes CMR totals by discipline for each accession. Run on all accession records or a subset. Set a filter on Acquisition date for the fiscal year.
CMR Catalog Count for Tag	Catalog Records	Provides CMR counts for records in any subset of your data. This replaces the CMR Catalog Count for Year report.
Collection Totals	Archives-Collection level	Totals all the item counts in the extent field for the visible records.
Container List.docx	Archives-any level	Word Document
Copyright Notice	Archives-Collection level	
Copyright Notice	Names and Addresses	
Daily Tasks	Maintenance	
DI-104 Transfer of Property	Deaccessions	
DI-104 Transfer of Property Blank Form.docx	Deaccessions	Word Document, blank form
DI-105 Receipt for Property	Accessions	This is a blank form.
DI-105 Receipt for Property	Catalog Records	Prints catalog records in a tag set or filter.
DI-105 Receipt for Property.docx	Catalog Records	Word Document, blank form
DI-3220 Notice of Potential Hazard in Museum Collections.docx	Deaccessions	Word Document
DI-3220 Notice of Potential Hazard in Museum Collections.docx	Loans Out	Word Document
DI-3220 Notice of Potential Hazard in Museum Collections.docx	Names and Addresses	Word Document
DOI Accession Receiving Report	Accessions	
DOI Accession Receiving Report Continuation	Accessions	
DOI Annotation Label	Catalog Records	For NH only
DOI Archival Use Record	Names and Addresses	
DOI Archival Use Record Continuation	Names and Addresses	
DOI CR Museum Catalog Record	Catalog Records	For CR only.
DOI Deaccession Form	Deaccessions	
DOI Deed of Gift	Accessions	
DOI Egg Box Label	Catalog Records	For NH only
DOI Exchange Agreement	Deaccessions	
DOI Exchange Agreement Continuation	Deaccessions	
DOI Geology Collection Label	Catalog Records	For NH only
DOI Herbarium Collection Label	Catalog Records	For NH only
DOI Incoming Loan Agreement	Loans In	
DOI Incoming Loan List	Loans In	
DOI Incoming Loan List.docx	Loans In	Word Document, blank form
DOI Insect Label	Catalog Records	For NH only
DOI Inventory – 100 Percent	Catalog Records	Run for all records. Same inventory cover sheet and checklist as in the AIP.
DOI Invertebrate Label	Catalog Records	For NH only
DOI Invertebrate Specimen Label	Catalog Records	For NH only
DOI List of Objects	Catalog Records	
DOI List of Objects.docx	Catalog Records	Word Document, blank form
DOI Mineral Collection Label	Catalog Records	For NH only
DOI NH Museum Catalog Record	Catalog Records	For NH only
DOI Object Condition Report	Catalog Records	
DOI Object Temporary Removal Slip	Catalog Records	

Report Name	Module	Description
DOI Outgoing Loan Agreement	Loans Out	
DOI Outgoing Loan Agreement Continuation	Loans Out	
DOI Outgoing Loan Agreement Extension	Loans Out	
DOI Paleontology Label	Catalog Records	For NH only
DOI Receipt for Property Detail-FullImage	Catalog Records	
DOI Receipt for Property Detail-Thumbnails	Catalog Records	
DOI Repatriation Agreement	Deaccessions	
DOI Repatriation Agreement Continuation	Deaccessions	
DOI Researcher Registration Form	Names and Addresses	
DOI Skull Vial-Box Label	Catalog Records	For NH only
DOI Vertebrate Specimen	Catalog Records	For NH only
DOI Vertebrate Wet Specimen Label	Catalog Records	For NH only
DOI Visitor Log	Names and Addresses	
DOI Visitor Log Conditions	Names and Addresses	
DOI Wet Plant Specimen Label	Catalog Records	For NH only
Duplication Form	Names and Addresses	
Ethnology Worksheet.docx	Catalog Records	For CR only, Word Document
Exchange Agreement.docx	Deaccessions	Word Document
Exhibit Labels	Catalog Records	Prints entry from the Exhibit Label field.
Exhibit List	Exhibits	
File Unit Details for All Levels	Archives-File Unit level	Used on main Finding Aid reports at Collection level. Do not run separately.
File Unit List for All Levels FA	Archives-File Unit level	Used on main Finding Aid reports at Collection level. Do not run separately.
File Unit Only Subreport	Archives-File Unit level	Used on main Finding Aid reports at Collection level. Do not run separately.
File Unit Totals	Archives-File Unit level	Totals all the item counts in the extent field for the visible records.
Finding Aid All Levels	Archives-Collection level	
Finding Aid with File Unit Entries	Archives-Collection level	
Finding Aid without File Unit Entries	Archives-Collection level	
Foldlist	Archives-Item level	Folder list
Geology Worksheet.docx	Catalog Records	For NH only Word Document
Hierarchy Subreport for Finding Aid	Archives-Series level	Used on main Finding Aid reports at Collection level. Do not run separately.
History Worksheet.docx	Catalog Records	For CR only, Word Document
IMAGE_REPORT	Catalog Records	
IMAGE_REPORT_FULLPAGE	Catalog Records	
Incoming Loan List	Loans In	
Item Finding Aid Subreport	Archives-Item level	Used on main Finding Aid reports at Collection level. Do not run separately.
Item Level Archives Worksheet.docx	Archives-Item level	Word Document
Item Totals	Archives-Item level	Totals all the item counts in the extent field for the visible records.
LOANCOST	Loans Out	Provides a total loan cost listed by loan
Location Schedule	Maintenance	
MAILING LABEL	Names and Addresses	Prints 3 columns of 1” H x 2” W labels.
NAGPRA Inventory Report	NAGPRA	Use button below button bar.
NAGPRA Items Report	NAGPRA	Use button below button bar.
NUCMUC	Archives-Collection level	
Object Caption List	Catalog Records	For CR only

Report Name	Module	Description
Object Caption Report	Catalog Records	For CR only
OST_IMAGE_REPORT	Catalog Records	
Outgoing Loan List	Loans Out	
Paleontology Worksheet.docx	Catalog Records	For NH only, Word Document
Quarterly Tasks	Maintenance	
Repatriation Agreement.docx	Deaccessions	Word Document
Researcher Registration Form	Names and Addresses	
Series Descriptions for All levels	Archives-Series level	Used on main Finding Aid reports at Collection level. Do not run separately.
Series Descriptions for Finding Aid	Archives-Series level	Used on main Finding Aid reports at Collection level. Do not run separately.
Series List All Levels Subreport	Archives-Series level	Used on main Finding Aid reports at Collection level. Do not run separately.
Series Totals	Archives-Series level	Totals all the item counts in the extent field for the visible records.
Series with File Unit Subreport	Archives-Series level	Used on main Finding Aid reports at Collection level. Do not run separately.
Source of Accession	Accessions	
Specialist Review Form	Deaccessions	
Specimen Caption List	Catalog Records	For NH only
Specimen Caption Report	Catalog Records	For NH only
Survey Form	Archives-Collection level	
Tasks	Maintenance	
Tasksstr	Maintenance	Same as Tasks, allows fields to stretch.
Title Page-FA	Archives-Collection level	Used on main Finding Aid reports. Do not run separately.
Unique Accession Numbers	Catalog Records	Lists all accession numbers represented in the data. Sort by accession number first.
Unique Locations	Catalog Records	Lists all locations represented in the data. Sort by location first.
Unique Names	Catalog Records	Lists all object or scientific names represented in the data. Sort by Object/Sci. Name first.
Unique Storage Unit Entries	Catalog Records	Lists all storage units represented in the data. Add the Storage Unit field to My List View and sort by it.
USGS Accession Receipt	Accessions	
USGS Accession Register	Accessions	Prints the acquisition date, source, number of catalog records and list of catalog records for the current directory.
USGS Deaccession Form	Deaccessions	
USGS Deaccession Log	Deaccessions	
USGS Incoming Loan Agreement	Loans In	
USGS Incoming Loan Agreement Continuation	Loans In	
USGS Outgoing Loan Agreement	Loans Out	
USGS Outgoing Loan Agreement Continuation	Loans Out	
Value	Catalog Records	Prints appraisal information.
Visitor Log Conditions.docx	Names and Addresses	Word Document
Visitor Log.docx	Names and Addresses	Word Document
WACC Finding Aid All Levels	Archives-Collection level	
Weekly Tasks	Maintenance	
XBGTG3	Catalog Records	Archeology bag tag
XBGTG3A	Catalog Records	Archeology bag tag

Report Name	Module	Description
XBGTG4	Catalog Records	Archeology bag tag
XBGTG4A	Catalog Records	Archeology bag tag
XBGTG5	Catalog Records	Archeology bag tag
XBGTGSTN	Catalog Records	Archeology bag tag

Automated Checklist Program Reports (ACP)

Report Name	Module	Description
Blank Checklist.docx	ACP Checklist	Word document. Prints out a blank form for the ACP. You must enter a facility record and type.
BOR Checklist Cover Sheet	ACP Cover Sheet	ACP Coversheet for BOR
BOR Estfund	ACP Checklist	Estimate of total funding needed by facility. Run on multiple facilities.
BOR Estfund2	ACP Checklist	Estimate of total funding needed. Run on single facility.
BOR Estfund3	ACP Checklist	Estimate of total funding needed for all facilities combined. Run on multiple facilities.
BOR Facility Cover Sheet	ACP Facilities	Facility coversheet for BOR
BOR Non-Reclamation Facility Info	ACP Facilities	Includes contact information for non-BOR facilities
BOR Reclamation Facility Info	ACP Facilities	Includes contact information for BOR facilities
Checklist by Facility	ACP Checklist	Run on single facility. Basic checklist form for current facility.
Checklist by Question	ACP Checklist	Checklist for All Facilities by Question. Run on multiple facilities.
Checklist for Deficiencies	ACP Checklist	Run on single facility. Shows only questions with ‘No’ answers.
Checklist with History	ACP Checklist	Run on single facility. Includes history of past responses to questions.
Deficiency Report	ACP Checklist	Run on multiple facilities.
Deficiency Report by Park	ACP Checklist	For sites that manage multiple parks. Run on multiple facilities. Lists deficiencies by park.
Deficiency Report by Park and Facility	ACP Checklist	For sites that manage multiple parks. Run on multiple facilities. Lists deficiencies by park and facility.
Deficiency Report by Unit	ACP Checklist	For sites that manage multiple units. Run on multiple facilities. Lists deficiencies by unit.
Deficiency Report by Unit and Facility	ACP Checklist	For sites that manage multiple units. Run on multiple facilities. Lists deficiencies by unit and facility.
DOI Checklist Cover Sheet	ACP Cover Sheet	ACP Coversheet for DOI
DOI Facility Cover Sheet	ACP Facilities	Facility coversheet for DOI
Estfund	ACP Checklist	Estimate of total funding needed by facility. Run on multiple facilities.
Estfund2	ACP Checklist	Estimate of total funding needed. Run on single facility.
Estfund3	ACP Checklist	Estimate of total funding needed for all facilities combined. Run on multiple facilities.
Facility List	ACP Facilities	List of Facilities
NPS Checklist Cover Sheet	ACP Cover Sheet	ACP Coversheet for NPS
NPS Facility Cover Sheet	ACP Facilities	Facility coversheet for NPS
PAM Chart D-Bureau Facilities	ACP Checklist	Property & Acquisitions Management report. Gives a rating for each bureau facility based on the percentage of standards met.
PAM Chart D-Non-Bureau Facilities	ACP Checklist	Property & Acquisitions Management report. Gives a rating for each non-bureau facility based on the percentage of standards met.

Report Name	Module	Description
Supercover	ACP Checklist	Superintendent's coversheet.
Superintendent Summary	ACP Checklist	Summary review for superintendent.
Unanswered Questions	ACP Checklist	Prints a list of questions in the ACP that have not been answered.

Automated Inventory Program Reports (AIP)

Report Name	Module	Description
10-349 Inventory – Accessions	AIP Accessions	Accession inventory list.
10-349 Inventory – Accessions – blank.docx	AIP Accessions	Word document, blank form.
10-349 Inventory – Controlled Property	AIP Controlled Property	Controlled Property inventory list.
10-349 Inventory – Controlled Property – blank.docx	AIP Controlled Property	Word document, blank form.
10-349 Inventory – Random Sample	AIP Random Sample	Random Sample inventory list.
10-349 Inventory – Random Sample – blank.docx	AIP Random Sample	Word document, blank form.
BOR Inventory – Accessions	AIP Accessions	Accession inventory list for BOR.
BOR Inventory – Controlled Property	AIP Controlled Property	Controlled Property inventory list for BOR.
BOR Inventory – Random Sample	AIP Random Sample	Random Sample inventory list for BOR
DOI Inventory – Accessions	AIP Accessions	Accession inventory list for DOI.
DOI Inventory – Controlled Property	AIP Controlled Property	Controlled Property inventory list for DOI.
DOI Inventory – Random Sample	AIP Random Sample	Random Sample inventory list for DOI
Summary (AIP Accessions)	AIP Accessions	AIP Summary sheet for accessions.
Summary (AIP Controlled Property)	AIP Controlled Property	AIP Summary sheet for Controlled Property.
Summary (AIP Random Sample)	AIP Random Sample	AIP Summary sheet for Random Sample.

Collections Management Report (CMR)

Report Name	Module	Description
10-94 CMR	Collections Management Report	CMR for NPS
10-94a CMR for Centers	Collections Management Report	Used by NPS Centers
BOR CMR	Collections Management Report	CMR for BOR
BOR CMR Items in Bureau and non-Bureau Facilities	Collections Management Report	Used by/for facilities housing bureau collections
CMR	Collections Management Report	CMR for NPS
CMRwork	Collections Management Report	Blank worksheet for CMR
DOI CMR	Collections Management Report	CMR for DOI
DOI CMR Items in Bureau and Non-Bureau Facilities	Collections Management Report	Used by/for facilities housing bureau collections
PAM Chart A	Collections Management Report	Property & Acquisitions Management report
PAM Chart B	Collections Management Report	Property & Acquisitions Management report
PAM Chart C	Collections Management Report	Property & Acquisitions Management report

Table of Reports and Forms Listed by Module

Note: NPS forms and reports begin with '10-'. For other bureau units, use the forms or reports that begin with 'DOI' or your bureau's acronym. Some reports and forms are not bureau specific and can be used department-wide.

Module	Report Name	Description
Accessions	10-95 Accession Receiving Report	
Accessions	10-95 Accession Receiving Report – Blank.docx	Word Document, blank form
Accessions	10-95c Accession Receiving Report Continuation	
Accessions	10-95c Accession Receiving Report Continuation – Blank.docx	Word Document, blank form
Accessions	10-255 Accession Folder Cover Sheet.docx	Word Document
Accessions	10-830 Deed of Gift	
Accessions	10-830 Deed of Gift – Blank.docx	Word Document, blank form
Accessions	10-830c Deed of Gift Continuation	
Accessions	10-830c Deed of Gift Continuation - Blank.docx	Word Document, blank form
Accessions	Accession List	Prints the acquisition date, source, number of catalog records and list of catalog records for the current directory.
Accessions	Accession Worksheet.docx	Word Document
Accessions	BOR Accession Folder.docx	Word Document
Accessions	BOR Accession List.docx	Word Document
Accessions	BOR Accession Receipt	
Accessions	BOR Accession Receiving Report	
Accessions	BOR Accession Receiving Report Continuation	
Accessions	BOR Accession Register	Prints the acquisition date, source, number of catalog records and list of catalog records for the current directory.
Accessions	BOR Deed of Gift Continuation	
Accessions	CMR Accession Verification	
Accessions	CMR Accession Verification-Count by Accession	Includes CMR totals by discipline for each accession. Run on all accession records or a subset. Set a filter on Acquisition date for the fiscal year.
Accessions	DI-105 Receipt for Property	This is a blank form.
Accessions	DOI Accession Receiving Report	
Accessions	DOI Accession Receiving Report Continuation	
Accessions	DOI Deed of Gift	
Accessions	Source of Accession	
Accessions	USGS Accession Receipt	
Accessions	USGS Accession Register	Prints the acquisition date, source, number of catalog records and list of catalog records for the current directory.
Archives-any level	10-96 Folder List.docx	Word Document
Archives-any level	10-645 Separation Sheet.docx	Word Document
Archives-any level	Container List.docx	Word Document
Archives-Collection level	Archives Worksheet.docx	Word Document
Archives-Collection level	Collection Totals	Totals all the item counts in the extent field for the visible records.
Archives-Collection level	Copyright Notice	

Module	Report Name	Description
Archives-Collection level	Finding Aid All Levels	
Archives-Collection level	Finding Aid with File Unit Entries	
Archives-Collection level	Finding Aid without File Unit Entries	
Archives-Collection level	NUCMUC	
Archives-Collection level	Survey Form	
Archives-Collection level	Title Page-FA	Used on main Finding Aid reports. Do not run separately.
Archives-Collection level	WACC Finding Aid All Levels	
Archives-Series level	Hierarchy Subreport for Finding Aid	Used on main Finding Aid reports at Collection level. Do not run separately.
Archives-Series level	Series Descriptions for All levels	Used on main Finding Aid reports at Collection level. Do not run separately.
Archives-Series level	Series Descriptions for Finding Aid	Used on main Finding Aid reports at Collection level. Do not run separately.
Archives-Series level	Series List All Levels Subreport	Used on main Finding Aid reports at Collection level. Do not run separately.
Archives-Series level	Series with File Unit Subreport	Used on main Finding Aid reports at Collection level. Do not run separately.
Archives-Series level	Series Totals	Totals all the item counts in the extent field for the visible records.
Archives-File Unit level	File Unit Details for All Levels	Used on main Finding Aid reports at Collection level. Do not run separately.
Archives-File Unit level	File Unit List for All Levels FA	Used on main Finding Aid reports at Collection level. Do not run separately.
Archives-File Unit level	File Unit Only Subreport	Used on main Finding Aid reports at Collection level. Do not run separately.
Archives-File Unit level	File Unit Totals	Totals all the item counts in the extent field for the visible records.
Archives-Item level	Foldlist	Folder list
Archives-Item level	Item Finding Aid Subreport	Used on main Finding Aid reports at Collection level. Do not run separately.
Archives-Item level	Item Level Archives Worksheet.docx	Word Document
Archives-Item level	Item Totals	Totals all the item counts in the extent field for the visible records.
Catalog Records	10-254 CR Museum Catalog Record	For CR only.
Catalog Records	10-254b NH Museum Catalog Record	For NH only.
Catalog Records	10-417 List of Objects	
Catalog Records	10-417 List of Objects.docx	Word Document, blank form
Catalog Records	10-500 Vertebrate Wet Specimen Label	For NH only
Catalog Records	10-500T Vertebrate Web Specimen Label	For NH only, prints in a single column.
Catalog Records	10-501 Vertebrate Specimen	For NH only
Catalog Records	10-501c Vertebrate Specimen-columns	For NH only, prints in multiple columns.
Catalog Records	10-502 Skull vial-box label	For NH only
Catalog Records	10-502c Skull vial-box Label-columns	For NH only, prints in multiple columns.
Catalog Records	10-503 Invertebrate Specimen Label	For NH only
Catalog Records	10-504 Geology Collection Label	For NH only
Catalog Records	10-504c Geology Collection Label-columns	For NH only, prints in multiple columns.
Catalog Records	10-505 Paleontology Label	For NH only
Catalog Records	10-505b Paleontology Label-small	For NH only

Module	Report Name	Description
Catalog Records	10-505c Paleontology Label-columns	For NH only, prints in multiple columns.
Catalog Records	10-506 Wet Plant Specimen Label	For NH only
Catalog Records	10-507 Invertebrate Label	For NH only
Catalog Records	10-507c Invertebrate Label-columns	For NH only, prints in multiple columns.
Catalog Records	10-508 Egg Box Label	For NH only
Catalog Records	10-509 Insect Label	For NH only
Catalog Records	10-509 Insect Label-Extra Small	For NH only
Catalog Records	10-509c Insect Label-Columns	For NH only, prints in multiple columns.
Catalog Records	10-509c Insect Label-Columns-Extra Small	For NH only, prints in multiple columns.
Catalog Records	10-509c Insect Label-Columns-Extra Small.docx	For NH only, Word Document for blank labels
Catalog Records	10-509T Insect Label	For NH only, prints in single column.
Catalog Records	10-510 Annotation Label	For NH only
Catalog Records	10-511 Mineral Collection Label	For NH only
Catalog Records	10-512 Herbarium Label	For NH only
Catalog Records	10-512 Herbarium Label.docx	For NH only, Word Document for blank labels
Catalog Records	10-637 Object Condition Report	
Catalog Records	10-97 Temporary Removal Slip	
Catalog Records	ACCCAT	Prints the accession source and count with a list of objects from the accession.
Catalog Records	Accession List	Create a tag set or group records by accession. Prints accession information with a list of the objects.
Catalog Records	Accession Total Cataloged	Prints total number of catalog records and total of item counts for each accession. Run on all visible or a group of catalog records.
Catalog Records	Archbag	For CR only, archeology bag label
Catalog Records	Archeology Label	For CR only
Catalog Records	Archeology Worksheet.docx	For CR only, Word Document
Catalog Records	Archives Worksheet-Cultural Resources.docx	For CR only, Word Document
Catalog Records	BIA CR Museum Catalog Record	
Catalog Records	Biology Worksheet.docx	For NH only, Word Document
Catalog Records	BOR List of Objects	
Catalog Records	BOR List of Objects.docx	Word Document
Catalog Records	BOR Object Condition Report	
Catalog Records	BOR Object Temporary Removal Slip	
Catalog Records	Catalog Number Log	
Catalog Records	CMR Catalog Count for Tag	Provides CMR counts for records in any subset of your data. This replaces the CMR Catalog Count for Year report.
Catalog Records	DI-105 Receipt for Property	Prints catalog records in a tag set or filter.
Catalog Records	DI-105 Receipt for Property.docx	Word Document, blank form
Catalog Records	DOI Annotation Label	For NH only
Catalog Records	DOI CR Museum Catalog Record	For CR only.
Catalog Records	DOI Egg Box Label	For NH only
Catalog Records	DOI Geology Collection Label	For NH only
Catalog Records	DOI Herbarium Collection Label	For NH only
Catalog Records	DOI Insect Label	For NH only

Module	Report Name	Description
Catalog Records	DOI Inventory – 100 Percent	Run for all records. Same inventory cover sheet and checklist as in the AIP.
Catalog Records	DOI Invertebrate Label	For NH only
Catalog Records	DOI Invertebrate Specimen Label	For NH only
Catalog Records	DOI List of Objects	
Catalog Records	DOI List of Objects.docx	Word Document, blank form
Catalog Records	DOI Mineral Collection Label	For NH only
Catalog Records	DOI NH Museum Catalog Record	For NH only
Catalog Records	DOI Object Condition Report	
Catalog Records	DOI Object Temporary Removal Slip	
Catalog Records	DOI Paleontology Label	For NH only
Catalog Records	DOI Receipt for Property Detail-FullImage	
Catalog Records	DOI Receipt for Property Detail-Thumbnails	
Catalog Records	DOI Skull Vial-Box Label	For NH only
Catalog Records	DOI Vertebrate Specimen	For NH only
Catalog Records	DOI Vertebrate Wet Specimen Label	For NH only
Catalog Records	DOI Wet Plant Specimen Label	For NH only
Catalog Records	Ethnology Worksheet.docx	For CR only, Word Document
Catalog Records	Exhibit Labels	Prints entry from the Exhibit Label field.
Catalog Records	Geology Worksheet.docx	For NH only Word Document
Catalog Records	History Worksheet.docx	For CR only, Word Document
Catalog Records	IMAGE_REPORT	
Catalog Records	IMAGE_REPORT_FULLPAGE	
Catalog Records	Object Caption List	For CR only
Catalog Records	Object Caption Report	For CR only
Catalog Records	OST_IMAGE_REPORT	
Catalog Records	Paleontology Worksheet.docx	For NH only, Word Document
Catalog Records	Specimen Caption List	For NH only
Catalog Records	Specimen Caption Report	For NH only
Catalog Records	Unique Accession Numbers	Lists all accession numbers represented in the data. Sort by accession number first.
Catalog Records	Unique Locations	Lists all locations represented in the data. Sort by location first.
Catalog Records	Unique Names	Lists all object or scientific names represented in the data. Sort by Object/Sci. Name first.
Catalog Records	Unique Storage Unit Entries	Lists all storage units represented in the data. Add the Storage Unit field to My List View and sort by it.
Catalog Records	Value	Prints appraisal information.
Catalog Records	XBGTG3	Archeology bag tag
Catalog Records	XBGTG3A	Archeology bag tag
Catalog Records	XBGTG4	Archeology bag tag
Catalog Records	XBGTG4A	Archeology bag tag
Catalog Records	XBGTG5	Archeology bag tag
Catalog Records	XBGTGSTN	Archeology bag tag
Deaccessions	10-643 Deaccession Form	
Deaccessions	10-643 Deaccession Form - Blank.docx	Word Document, blank form
Deaccessions	10-644 Deaccession Folder Cover Sheet.docx	Word Document
Deaccessions	10-99 Conveyance Agreement	

Module	Report Name	Description
Deaccessions	10-99 Conveyance Agreement - Blank.docx	Word Document, blank form
Deaccessions	BOR Deaccession Folder.docx	
Deaccessions	BOR Deaccession Form	
Deaccessions	BOR Deaccession Log	
Deaccessions	BOR Exchange Agreement	
Deaccessions	BOR Exchange Agreement Continuation	
Deaccessions	BOR Repatriation Agreement	
Deaccessions	BOR Repatriation Agreement Continuation	
Deaccessions	DI-104 Transfer of Property	
Deaccessions	DI-104 Transfer of Property Blank Form.docx	Word Document, blank form
Deaccessions	DI-3220 Notice of Potential Hazard in Museum Collections.docx	Word Document
Deaccessions	DOI Deaccession Form	
Deaccessions	DOI Exchange Agreement	
Deaccessions	DOI Exchange Agreement Continuation	
Deaccessions	DOI Repatriation Agreement	
Deaccessions	DOI Repatriation Agreement Continuation	
Deaccessions	Exchange Agreement.docx	Word Document
Deaccessions	Repatriation Agreement.docx	Word Document
Deaccessions	Specialist Review Form	
Deaccessions	USGS Deaccession Form	
Deaccessions	USGS Deaccession Log	
Exhibits	Exhibit List	
Loans In	10-98 Incoming Loan Agreement	
Loans In	10-98 Blank Incoming Loan Agreement.docx	Word Document, blank form
Loans In	10-98a Conditions for Incoming Loans.docx	Word Document
Loans In	10-98b Incoming Loan Extension	
Loans In	10-98b Incoming Loan Extension – Blank.docx	Word Document, blank form
Loans In	10-98c Incoming Loan Agreement Continuation	
Loans In	BOR Incoming Loan Agreement	
Loans In	BOR Incoming Loan Agreement Continuation	
Loans In	BOR Incoming Loan Extension	
Loans In	BOR Incoming Loan Extension-Blank.docx	Word Document, blank form
Loans In	BOR Incoming Loan Folder.docx	Word Document
Loans In	BOR Incoming Loan List	
Loans In	BOR Incoming Loan List.docx	Word Document, blank form
Loans In	DOI Incoming Loan Agreement	
Loans In	DOI Incoming Loan List	
Loans In	DOI Incoming Loan List.docx	Word Document, blank form
Loans In	Incoming Loan List	
Loans In	USGS Incoming Loan Agreement	
Loans In	USGS Incoming Loan Agreement Continuation	
Loans Out	10-127 Outgoing Loan Agreement	

Module	Report Name	Description
Loans Out	10-127 Blank Outgoing Loan Agreement.docx	Word Document, blank form
Loans Out	10-127a Conditions for Outgoing Loans.docx	Word Document
Loans Out	10-127c Outgoing Loan Agreement Continuation	
Loans Out	10-640 Outgoing Loan Folder Cover Sheet	
Loans Out	10-640 Outgoing Loan Folder Cover Sheet – Blank.docx	Word Document, blank form
Loans Out	10-641 Outgoing Loan Extension	
Loans Out	10-641 Outgoing Loan Extension – Blank.docx	Word Document, blank form
Loans Out	BOR Outgoing Loan Agreement	
Loans Out	BOR Outgoing Loan Agreement Continuation	
Loans Out	BOR Outgoing Loan Extension	
Loans Out	BOR Outgoing Loan Folder.docx	Word Document
Loans Out	BOR Outgoing Loan List.docx	Word Document
Loans Out	DI-3220 Notice of Potential Hazard in Museum Collections.docx	Word Document
Loans Out	DOI Outgoing Loan Agreement	
Loans Out	DOI Outgoing Loan Agreement Continuation	
Loans Out	DOI Outgoing Loan Agreement Extension	
Loans Out	LOANCOST	Provides a total loan cost listed by loan
Loans Out	Outgoing Loan List	
Loans Out	USGS Outgoing Loan Agreement	
Loans Out	USGS Outgoing Loan Agreement Continuation	
Maintenance	Daily Tasks	
Maintenance	Location Schedule	
Maintenance	Quarterly Tasks	
Maintenance	Tasks	
Maintenance	Tasksstr	Same as Tasks, allows fields to stretch.
Maintenance	Weekly Tasks	
NAGPRA	NAGPRA Inventory Report	Use button below button bar.
NAGPRA	NAGPRA Items Report	Use button below button bar.
Names and Addresses	BOR Collection Use Record	
Names and Addresses	BOR Collection Use Record Continuation	
Names and Addresses	BOR Contact Information for Accountable Officers	
Names and Addresses	BOR Contact Information for Custodial Officers	
Names and Addresses	BOR Duplication Form	
Names and Addresses	BOR Researcher Registration Form	
Names and Addresses	BOR Visitor Log	
Names and Addresses	BOR Visitor Log Conditions	
Names and Addresses	Copyright Notice	
Names and Addresses	DI-3220 Notice of Potential Hazard in Museum Collections.docx	Word Document
Names and Addresses	DOI Archival Use Record	
Names and Addresses	DOI Archival Use Record Continuation	

Module	Report Name	Description
Names and Addresses	DOI Researcher Registration Form	
Names and Addresses	DOI Visitor Log	
Names and Addresses	DOI Visitor Log Conditions	
Names and Addresses	Duplication Form	
Names and Addresses	MAILING LABEL	Prints 3 columns of 1” H x 2” W labels.
Names and Addresses	Researcher Registration Form	
Names and Addresses	Visitor Log.docx	Word Document
Names and Addresses	Visitor Log Conditions.docx	Word Document

Automated Checklist Program Reports (ACP)

Module	Report Name	Description
ACP Cover Sheet	BOR Checklist Cover Sheet	ACP Coversheet for BOR
ACP Cover Sheet	DOI Checklist Cover Sheet	ACP Coversheet for DOI
ACP Cover Sheet	NPS Checklist Cover Sheet	ACP Coversheet for NPS
ACP Facilities	BOR Facility Cover Sheet	Facility coversheet for BOR
ACP Facilities	BOR Non-Reclamation Facility Info	Includes contact information for non-BOR facilities
ACP Facilities	BOR Reclamation Facility Info	Includes contact information for BOR facilities
ACP Facilities	DOI Facility Cover Sheet	Facility coversheet for DOI
ACP Facilities	Facility List	List of Facilities
ACP Facilities	NPS Facility Cover Sheet	Facility coversheet for NPS
ACP Checklist	Blank Checklist.docx	Word document. Prints out a blank form for the ACP. You must enter a facility record and type.
ACP Checklist	Checklist by Facility	Run on single facility. Basic checklist form for current facility.
ACP Checklist	Checklist by Question	Checklist for All Facilities by Question. Run on multiple facilities.
ACP Checklist	Checklist for Deficiencies	Run on single facility. Shows only questions with ‘No’ answers.
ACP Checklist	Checklist with History	Run on single facility. Includes history of past responses to questions.
ACP Checklist	Deficiency Report	Run on multiple facilities.
ACP Checklist	Deficiency Report by Park	For sites that manage multiple parks. Run on multiple facilities. Lists deficiencies by park.
ACP Checklist	Deficiency Report by Park and Facility	For sites that manage multiple parks. Run on multiple facilities. Lists deficiencies by park and facility.
ACP Checklist	Deficiency Report by Unit	For sites that manage multiple units. Run on multiple facilities. Lists deficiencies by unit.
ACP Checklist	Deficiency Report by Unit and Facility	For sites that manage multiple units. Run on multiple facilities. Lists deficiencies by unit and facility.
ACP Checklist	BOR Estfund	Estimate of total funding needed by facility. Run on multiple facilities.
ACP Checklist	BOR Estfund2	Estimate of total funding needed. Run on single facility.
ACP Checklist	BOR Estfund3	Estimate of total funding needed for all facilities combined. Run on multiple facilities.
ACP Checklist	Estfund	Estimate of total funding needed by facility. Run on multiple facilities.
ACP Checklist	Estfund2	Estimate of total funding needed. Run on single facility.
ACP Checklist	Estfund3	Estimate of total funding needed for all facilities combined. Run on multiple facilities.

ACP Checklist	PAM Chart D-Bureau Facilities	Property & Acquisitions Management report. Gives a rating for each bureau facility based on the percentage of standards met.
ACP Checklist	PAM Chart D-Non-Bureau Facilities	Property & Acquisitions Management report. Gives a rating for each non-bureau facility based on the percentage of standards met.
ACP Checklist	Supercover	Superintendent's coversheet.
ACP Checklist	Superintendent Summary	Summary review for superintendent.
ACP Checklist	Unanswered Questions	Prints a list of questions in the ACP that have not been answered.

Automated Inventory Program Reports (AIP)

Module	Report Name	Description
AIP Accessions	10-349 Inventory – Accessions	Accession inventory list.
AIP Accessions	10-349 Inventory – Accessions – blank.docx	Word document, blank form.
AIP Accessions	BOR Inventory – Accessions	Accession inventory list for BOR.
AIP Accessions	DOI Inventory – Accessions	Accession inventory list for DOI.
AIP Accessions	Summary (AIP Accessions)	AIP Summary sheet for accessions.
AIP Controlled Property	10-349 Inventory – Controlled Property	Controlled Property inventory list.
AIP Controlled Property	10-349 Inventory – Controlled Property – blank.docx	Word document, blank form.
AIP Controlled Property	BOR Inventory – Controlled Property	Controlled Property inventory list for BOR.
AIP Controlled Property	DOI Inventory – Controlled Property	Controlled Property inventory list for DOI.
AIP Controlled Property	Summary (AIP Controlled Property)	AIP Summary sheet for Controlled Property.
AIP Random Sample	10-349 Inventory – Random Sample	Random Sample inventory list.
AIP Random Sample	10-349 Inventory – Random Sample – blank.docx	Word document, blank form.
AIP Random Sample	BOR Inventory – Random Sample	Random Sample inventory list for BOR
AIP Random Sample	DOI Inventory – Random Sample	Random Sample inventory list for DOI
AIP Random Sample	Summary (AIP Random Sample)	AIP Summary sheet for Random Sample.

Collections Management Report (CMR)

Module	Report Name	Description
Collections Management Report	10-94 CMR	CMR for NPS
Collections Management Report	10-94a CMR for Centers	Used by NPS Centers
Collections Management Report	BOR CMR	CMR for BOR
Collections Management Report	BOR CMR Items in Bureau and non-Bureau Facilities	Used by/for facilities housing bureau collections
Collections Management Report	CMR	CMR for NPS
Collections Management Report	CMRwork	Blank worksheet for CMR
Collections Management Report	DOI CMR	CMR for DOI
Collections Management Report	DOI CMR Items in Bureau and Non-Bureau Facilities	Used by/for facilities housing bureau collections
Collections Management Report	PAM Chart A	Property & Acquisitions Management report
Collections Management Report	PAM Chart B	Property & Acquisitions Management report
Collections Management Report	PAM Chart C	Property & Acquisitions Management report

I. REPORTS AND FORMS

A. Overview

1. *Does **ICMS** include Bureau forms?*

Yes. **ICMS** includes all the mandatory forms for your unit and many other optional forms and reports. NPS form numbers begin with 10, such as 10-254. Department of Interior forms begin with DI or DOI, such as DI-105. Bureau of Reclamation forms begin with BOR and U.S. Geological Survey forms begin with USGS. Other forms in the program appear by name.

Note: If there is no specific form for your bureau, you should use the general DOI form where available.

Many of the forms are mapped. This means that the program will complete the forms from the data you enter in the fields in the program.

2. *How will I know which forms or reports are mapped?*

This chapter includes a list of the forms that are mapped. The manual and on-line field help will also tell you which fields are mapped to the forms.

3. *Where are the forms located?*

Forms are located in the Cultural Resources and Natural History collection records, most of the associated modules, the ACP, AIP, CMR and the Archives Module. You must go to the appropriate module in the program to access reports and forms for that module. For example, you must go to the Loans Out associated module to access the outgoing loan agreement.

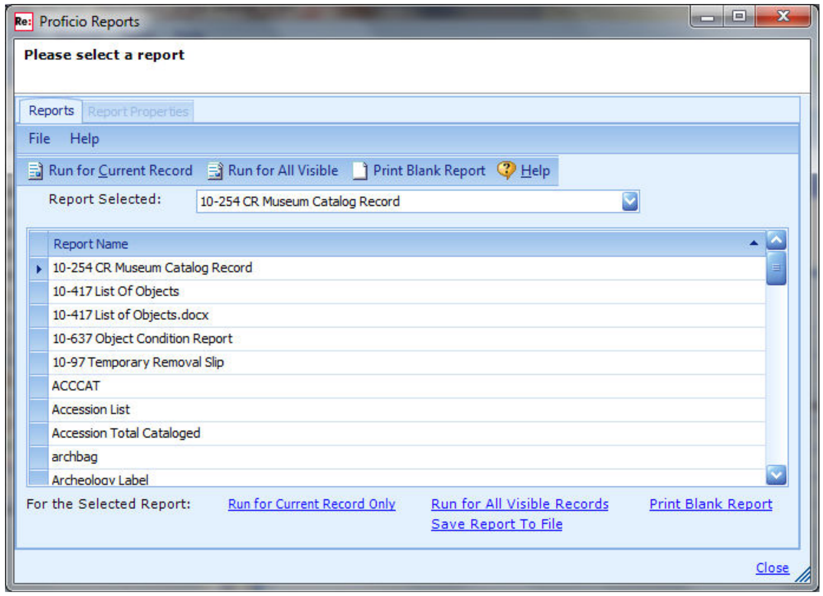
Note: See Appendix F: Archives Module, for information on the reports in this module

4. *How do I access the forms?*

To access the forms:

- Go to the appropriate module and choose the records you want in the report or form. Activate a filter, tag set or highlight records in the list pane to print a form that includes data from a group of records, such as a receipt for property. Refer to Chapter 7 for information on activating filters, and tag sets.
- Click on the Proficio Reports icon on the button bar, or go to Record on the menu bar and choose Reports → Proficio Reports → Proficio Reports.

A list of reports and forms appears in a separate window. Forms with a .docx extension print from your word processing system.

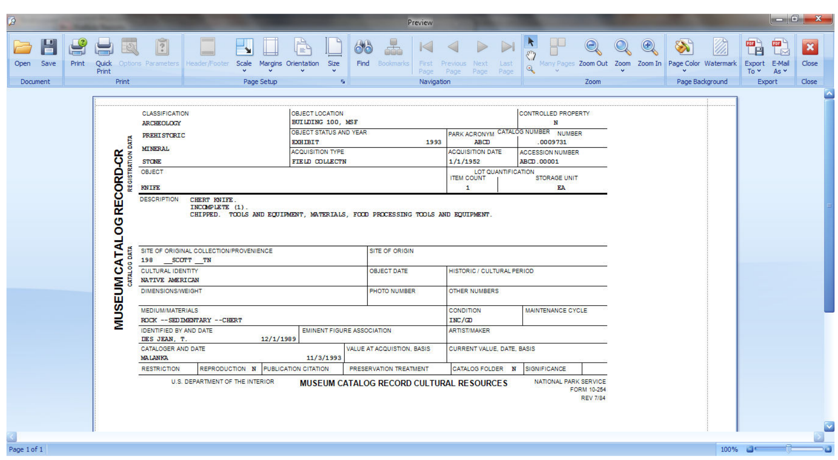


Forms with a .docx extension are Word documents. When printing, they will open in a Microsoft Word window. Print them as you would any other Word document. You can complete these forms on the computer or manually. If you complete the forms on the computer, save them under another name. You can then maintain a clean copy of the forms for future use. Save these forms in Word to preserve the formatting.

5. *How do I print a form?*

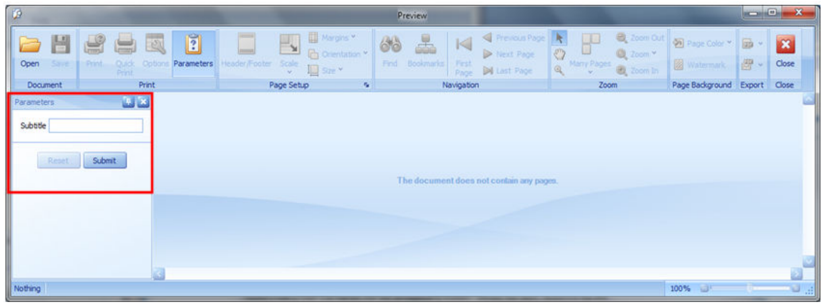
To print a form or report:

- Go to the list of reports and forms in the appropriate module.
- Choose a report on the list by clicking on it.
- Click Run for Current Record only, to print the form for the record currently on the screen. Click Run for All Visible Records when you have a filter or tag set activated or records highlighted in the list pane. Click Print Blank Report to print a blank form to complete manually.
- The Preview window opens.



- A few reports such as the maintenance schedules use subtitles. (Refer to Section VI of Chapter 4 for information on completing the maintenance schedules.) Fill in the appropriate subtitle for the report in the Parameters panel on the left and click Submit to preview the report.

  Note: If you choose not to enter a subtitle, you must still click Submit to preview and print the report.



- Click the Print button to bring up the print dialog box. Follow the Windows print commands that appear in the print dialog box. Or, to send the form directly to the default printer for your workstation, click the Quick Print button – it will print the form immediately.

6. *Can I save a report electronically?*

Yes. There are two methods for saving a report electronically – from the report Preview window or by selecting the Save Report to File option from the Proficio Reports list.

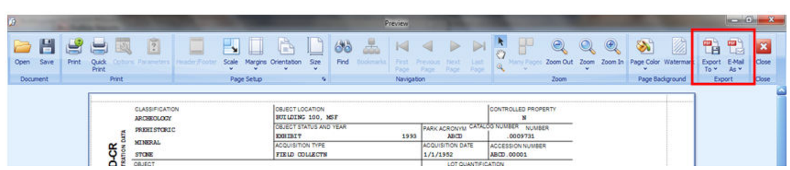
Note: There are more file format options from the report Preview window. The Save Report to File method only saves the report in PDF or RTF format.

<u>Method 1: Export Document from report Preview window</u>
From the report Preview window, to save a report to a file that can be sent through email, follow these steps:

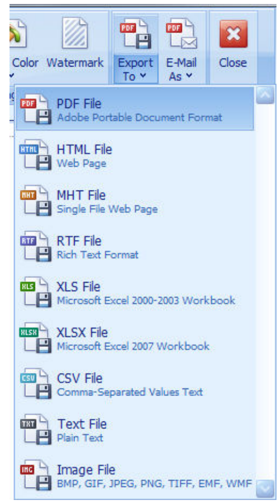
- Select the report and click Run for Current Record or Run for All Visible Records.

- In the Preview window, there are two Export Document options on the button bar: Export To or Email As.

  Note: DO NOT use the Save button on the left side of the button bar. It does not save the file in a format readable by most systems.

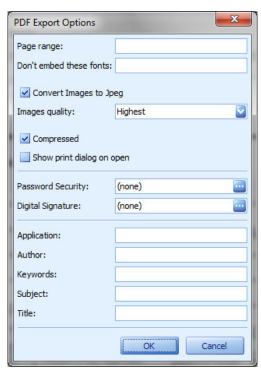


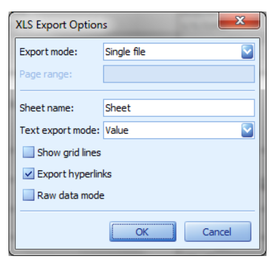
- Both export options will allow you to select the file format from a drop down list. Choose from one of the following file types:



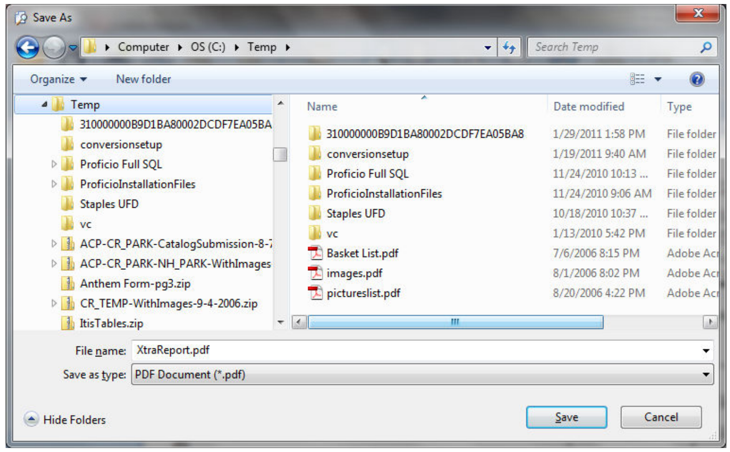
- PDF File (Adobe portable document format)
- HTML File (web page) – not available on email option
- MHT File (single file web page)
- RTF File (rich text format)
- XLS File (Microsoft Excel 2000-2003 workbook)
- XLSX File (Microsoft Excel 2007 workbook)
- CSV File (comma-separated values text file)
- Text File (plain text)
- Image File (bmp, gif, jpeg, png, tiff, emf, wmf)

- After selecting the file type you want, an options window will open for that file type. For the most part, you can simply click OK to accept the default options for that file type. Here are examples of the options for the PDF and XLS file types.





- A Save As dialog box will open to allow you to select a location on your workstation or network and name the file. (If you do not change the file name, the default name is "XtraReport" with the file extension of the type you selected.) Click Save.

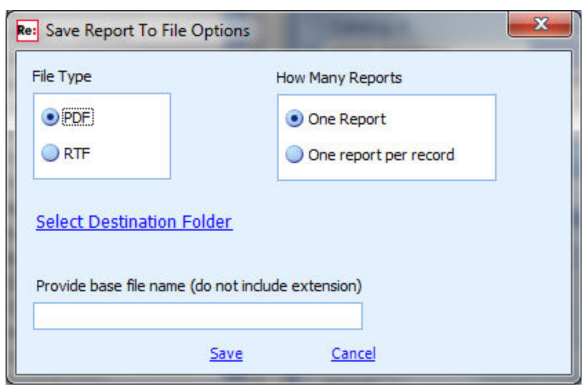


Note: If you chose the Email As… option, after the file is saved, your email program will open with a new message window with the exported file attached. Complete the email information and send.

<u>Method 2: Save Report to File from the Proficio Reports Window</u>
To save a report to file (PDF or RTF only) from the Proficio Reports window, follow these steps:

Note: Make sure to activate a tag set or filter or highlight multiple records in the List Pane to limit your data.

- In the Proficio Reports window, select the report from the list and click <u>Save Report to File</u>.



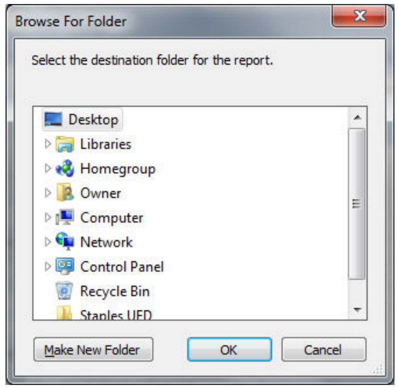
- Select the File Type: PDF or RTF

- Select how many reports you want to create:

  <u>One Report</u> will create a single electronic file with all visible records in the report. (Make sure you have activated a tag set or filter or highlighted multiple records in the List Pane to limit your data.)

  <u>One report per record</u> will create multiple electronic files of the report with one record each depending on the number of records in your visible data. E.g., if you have 10 records in your visible data, you will have 10 separate electronic files of the chosen report – one for each record. (Make sure you have activated a tag set or filter or highlighted multiple records in the List Pane to limit your data.)

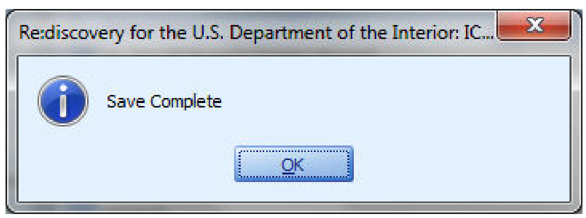
- Click Select Destination Folder to select the location to save the file(s). Note: the program will remember the location from previous times based on the ICMS user id. Use this link to select the location to save the file(s) if no location is shown just below this link or you wish to change the location to save the file(s).



- Highlight the destination folder and click OK.

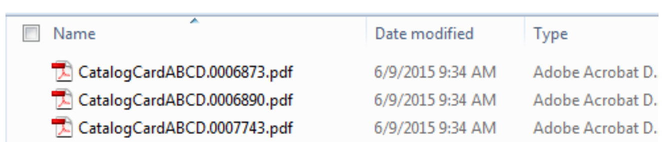
- Enter a base file name for the file. Do not enter a file extension; the program will provide that for you.

- Click Save.



- Click OK on the Save Complete message.

- Your file(s) will be in the destination folder you selected with the name you entered for the base name. If you chose to create one report per record, the files will begin with the base file name you entered followed by the unique identifier for that module – e.g., the Catalog # for catalog records, the Loan ID for loan records, etc.



7. *Why would I want to print a blank form if **ICMS** will complete the forms for me?*

You may want to print a blank form for a worksheet, or you may prefer to complete the forms manually.

8. *Can I change the forms and reports in **ICMS**?*

No. You cannot change the reports and forms that are included in **ICMS**. You can make modifications to the Word forms that print from your word processing system. For example, you may want to add wording to the exchange agreement to include conditions specific to the exchange. However, you should save modified forms under another name to maintain a clean copy of the original form for future use.

9. *Can I add forms and reports to **ICMS**?*

Yes. You can add unit-specific reports and forms to **ICMS**, but you cannot use these forms in place of the standard Bureau forms. For example, you cannot add an outgoing loan agreement to use in place of the existing Outgoing Loan Agreement for your bureau.

To create other forms and reports, refer to the Quick Report (III) and Proficio Reports Designer (V) sections in this chapter.

You can also purchase customization services from Re:discovery Software, Inc. to have them create unit-specific reports and forms. Refer to Appendix K: Support, for information on purchasing customization services.

10. *Must I print forms on special paper?*

Use acid-free paper for printing accession, loan, deaccession, and catalog forms. You don't need to use acid-free paper for printing reports and forms such as maintenance schedules and CMR verification reports.

11. *Will new Bureau forms and reports be added to **ICMS**?*

Yes. Any new official forms will be added to the program as needed. Future updates of the program may include forms that bureaus have developed.

B. NPS Unit and Unit

1. *What are the NPS Unit and Unit?*

The NPS Unit and Unit are name and address records for the unit that maps to many of the Bureau forms in the program. The NPS Unit record is used on NPS forms; the Unit record is used on other bureau forms. When you install and setup **ICMS**, you should enter a NPS Unit or a Unit record depending on your agency. Once you enter the record in the program, you can modify it as changes occur at the unit.

2. *How do I enter the NPS Unit or Unit record?*

To enter the NPS Unit or Unit record, go to the Names and Addresses associated module. Refer to Section XII of Chapter 4 for how to use this module. Complete the fields in the record as follows:

Name ID – enter the words: NPS UNIT or UNIT (in all caps). ***Don't enter the name of the unit.***

First - enter the first name of the superintendent or unit manager

Last - enter the last name of the superintendent or unit manager

Title - enter Superintendent or the appropriate title

Div/Unit - enter the name of the unit

Address 1 - enter the first line of the unit's address

Address 2 - enter the second line of the unit's address

City/St/Zip - enter the city, state, and zip code for the unit

Alternate Address - complete these fields if the unit's shipping address is different from the mailing address

Phone - enter the unit's phone number

Fax - enter the unit's fax number

NPS - enter NPS
(***DOI*** - enter DOI)

C. Catalog Record Forms and Reports

1. *Where do I go to print catalog record forms and reports?*

Go to the Catalog Records Module, either Cultural Resources or Natural History, to print collection record forms and reports. This section contains a list of the forms and reports available in the Collection Records Module. It also includes a list of the fields that map to the forms. Mandatory forms are marked with an asterisk (*).

You will see a different list of forms and reports in the Cultural Resources and Natural History directories. However, some of the forms are common to both. For these common reports, you must run separate reports for CR and NH records. You cannot combine the reports to include data from both directories.

2. *What forms and reports are available from the Catalog Records Module?*

**Museum Catalog Record*

Use the **10-254, BIA** or **DOI CR Museum Catalog Record** with Cultural Resources records. Use the **10-254B** or **DOI NH Museum Catalog Record** with Natural History records. Select the form appropriate for your unit.

For NPS, you don't have to print the Form 10-254. The National Catalog will print archival copies of these forms from your electronic submission. The National Catalog will also print blue working copies for the park if you request them.

The fields map from the corresponding fields on the catalog record screen with the following exceptions:

Report Field	***Maps From***
Acquisition Type	Acquisition Type in the Accession Records associated module
Acquisition Date	Acquisition Date in the Accession Records associated module
Photo Number	Images supplemental record – the most recent entry
Value at Acquisition, Basis	Appraisals supplemental record – the record must contain Accession as the entry in the Reason field
Current Value, Date, Basis	Appraisals supplemental record – the most recent entry
Restriction	Restrictions supplemental record – Y if there is an entry, N if the supplemental record is empty.
Reproduction	Reproduction field on the Catalog screen – Y if the entry is Reproduction, N if there is any other entry.

Publication Citation	Publication Citation supplemental record – Y if there is an entry, N if the supplemental record is empty.
Preservation Treatment	Preservation supplemental record – Y if there is an entry, N if the supplemental record is empty
Significance	Significance supplemental record – Y if there is an entry, N if the supplemental record is empty

Note: The program prints up to six lines of description on the catalog record from the Description memo field on the Catalog screen.

List of Objects

Use this form to attach lists of objects to loan and deaccession forms. Select the form appropriate for your unit:

10-417 List of Objects
BOR List of Objects
DOI List of Objects

Report Field	***Maps From***
Park Acronym (10-417 only)	Park Acronym
Catalog Number	Catalog Number (doesn't include acronym on 10-417)
Accession Number	Accession Number
Item Count or Quantity	Item Count or Quantity
Object Name	Object Name or Scientific Name
Description and Condition	Description (top line), Condition (bottom line)
Value	Appraisals supplemental record - most recent entry

Note: You must complete the Comment and Number fields manually. If you want to print a blank form, use the **10-417 List of Objects.docx, BOR List of Objects.docx** or **DOI List of Objects.docx** report instead.

Object Condition Report

Use this report to document object condition for loans. Select the form appropriate for your unit:

10-637 Object Condition Report
BOR Object Condition Report
DOI Object Condition Report

Report Field	***Maps From***
Catalog Number	Catalog Number
Accession Number	Accession Number
Object Name	Object Name or Scientific Name

Item Count	Item Count and Storage Unit
Component Parts	Parts
Outgoing Loan Number	Loans Out associated module - if the object is attached to an outgoing loan
Photograph Numbers	Images supplemental record
Condition	Condition Description (memo field on the catalog record)

Note: You must complete the Condition Described By and Condition on Return of Object sections manually.

Temporary Removal Slip

Use this form in place of the object when you temporarily move the object. Select the form appropriate for your unit:

10-97 Temporary Removal Slip
BOR Object Temporary Removal Slip
DOI Object Temporary Removal Slip

Report Field	***Maps From***
Catalog Number	Catalog Number
Permanent Location	Location supplemental record - the record must contain Permanent as the entry in the Reason field
Purpose for Removal	Location supplemental record - the entry in the Reason field for the most recent location
Temporary Location	Location supplemental record - the location from the most recent location
Removed By	Location supplemental record - the entry in the Entered By field for the most recent location
Date Removed	Location supplemental record - the entry in the Start Date field for the most recent location

Accession List

Use this form to print a list of catalog records grouped by accession. The form prints the Accession number from the catalog record and the Acquisition Type, Acquisition Date and Source from the Accession record. A list of catalog records is included with the catalog number, component parts, object or specimen name, item count and quantity listed and totaled.

Accession Total Cataloged

Use this report to calculate the total number of records and item counts by accession. The report prints one line for each unique accession number with the total number of catalog records in your visible data and the totals for item count and quantity for those catalog records.

ACCCAT

Run this report on a subset of your data to print a list of catalog records associated with an accession. First, limit your data to a specific accession number. The report includes the accession number, acquisition type, source, catalog number, object name, item count and object status.

Archeology Label	This is a box label for archeology collections. The label is not mapped. You must complete the label manually.
Archeology Bag Labels: *Archbag,* *XBGTG3, XBGTG3A, XBGTG4, XBGTG4A, XBGTG5, XBGTGSTN*	Run this report on a single record or subset of your data to print bag labels for archeology collections. Each report uses a different configuration for the labels, printing various fields from the archeology catalog record. Choose a report for the bag label format desired. The Archbag report prints larger labels with the most data which include the classification fields, object name, catalog number, accession number, location, item count, weight, other numbers, material, cataloger and catalog date, id by and date, field site #, state site #, within site provenience, site name, historic/culture period, cultural id, manufacturing technique, decoration technique and motif, field specimen #, temper, type name, collector and collection date. The XBGTG* reports are smaller labels of various sizes with the accession number, catalog number, item count, site name and within site provenience.
Worksheets: *Archeology worksheet.docx,* *Archives Worksheet – Cultural Resources.docx,* *Biology Worksheet.docx,* *Ethnology Worksheet.docx,* *Geology Worksheet.docx,* *History Worksheet.docx,* *Paleontology Worksheet.docx*	These reports are Word documents that can be used as worksheets to fill out catalog records for the various disciplines to aid in data entry. Each will open in a Word window. Print as you would any other word document.
Catalog Number Log	This report prints a list of catalog numbers with the accession number and object/specimen name for each catalog number. Use this report whenever you need a simple list of catalog records to include in a file or send to someone.
CMR Catalog Count for Tag	Refer to Appendix H: Collections Management Report for information on this verification report. Use it to verify the data that the CMR pulls from your catalog directories. Run this report on all catalog records or a subset of catalog records. **Note:** This report replaces the CMR Catalog Count for Year. It can be run on any subset of data.
DI-105 Receipt for Property	Use this form to document receipt of museum objects.

Report Field	***Maps From***
Property	Catalog Number
Description	Object Name or Scientific Name - first line Description - second line
Quantity	Item Count
Unit of Issue	Storage Unit
Cost	Appraisals supplemental record - the most recent appraisal

The report will prompt you for the bureau, office or park in the Parameters panel of the Preview window. Enter your unit name and click Submit to have it fill in the Bureau or Office line at the top of the DI-105. You must manually complete the names, signatures, and dates at the bottom of the form.

Note: If you want to print a blank form to complete manually, use the **DI-105 Receipt for Property.docx** report instead.

DOI Receipt for Property Detail-Fullimage,
DOI Receipt for Property Detail-Thumbnails

Use these forms to print a detail receipt for property that includes either the full image or the thumbnail attached to the record as indicated by the report name.

Report Field	***Maps From***
Number	Catalog Number
Description	Object Name or Scientific Name, Key Descriptor, Location, Other Numbers, Measurements, Condition, Condition Description, Artist/Maker, Description
Image	Full image or thumbnail of the first image attached to the record

The report will prompt you for the bureau, office or park in the Parameters panel of the Preview window. Enter your unit name and click Submit to have it fill in the Bureau or Office line at the top of the receipt for property.

DOI Inventory – 100 percent

Use this form to print a list of all your catalog records to perform a 100% inventory. You should first sort your data by the Location field, then click <u>Run for All Visible Records</u> when you run the report. The list includes the location, catalog number and object/specimen name. You must manually complete the inventory cover sheet, check boxes and remarks/condition information when performing the inventory.

Exhibit Labels

Run this report on a single record or group of records to print a list of exhibit labels. You may wish to sort by catalog number or object/scientific name before running this report. It will print the catalog number, object name or scientific name, and exhibit label fields.

Refer to Chapter 2: Cataloging for information on how to automatically generate the data in the Exhibit Label field for your catalog records.

Missing Required Data for Cultural Records
Missing Required Data for Natural History Records

The missing required data functions are now more easily accomplished with standard features: from the View menu, Update My List View, choose any of the required fields you want to check for missing data (the required fields vary by module, and by discipline within the Catalog Record screen). With those fields in the List Pane, use Quick Sort or Quick Filter (from the List Pane column headers), to sort or filter the field and Identify records with missing data.

See Chapter 7, Section II.B and Section V for information on Quick Filters and Sorting your data.

Image_Report,
Image_Report_FullPage,
OST_Image_Report

Run these reports to print a brief description of a single record or group of records that includes the first image attached to the record. These can be used to provide information for exhibits, loans or inventories.

The Image_Report prints multiple records per page with the image to the right of the data (catalog number, object or scientific name, and description).

The Image_Report_FullPage prints one record per page with a larger image at the top and catalog number, key descriptor, location, and measurements. You must manually complete the Loan?, Destination, Mover and Notes fields.

The OST_Image_Report prints one record per page with the image at the top for inventory purposes. It includes the catalog number, object or scientific name, condition, material, artist/maker, description, measurements, location and cataloger fields. You must complete the date of inventory manually.

Object Caption List, Specimen Caption List, Object Caption Report, Specimen Caption Report

Run these reports on a single record or group of records to provide information for exhibits or loans. The CR captions print the object name, manufacture dates, artist/maker, material, measurements and catalog number. The NH captions print the scientific and common names, measurements and catalog number. The Lists print the information in horizontal format while the Reports print the information in vertical format.

Note: Sort your data by one of the fields in the reports -- object or scientific name, catalog number, material – before running the reports. See Section V of Chapter 7 for information on sorting your visible data.

The report will prompt you for the name of the field you sorted by in the Parameters panel of the Preview window. Enter the sort field name and click Submit – it will appear at the top of the form under Sorted By.

Unique Accession Numbers, Unique Locations, Unique Names, Unique Storage Unit Entries

Run these reports on the entire directory or subsets of your data to print an alphabetical list of unique entries for the field indicated in the report name. It includes the number of records represented in your data for each unique entry. These can aid in standardizing names, locations, etc.

The report will prompt you for an optional subtitle in the Parameters panel of the Preview window. Enter the subtitle (if desired) and click Submit.

Value

Run this report on subsets of your data to list and total the value of the objects. The list includes the catalog number and object/specimen name, and the most recent value from the Appraisals supplemental record. The report includes a total value for all the listed objects.

3. *What natural history labels are available in the Catalog Records Module?*

ICMS includes all of the Bureau natural history labels. These labels are mandatory for natural history collections. They include:

Natural history labels for the NPS begin with '10-'. For other bureau units, use the labels that begin with 'DOI'.

**Vertebrate Wet Specimen Label*

Select the appropriate report for your unit:

10-500 Vertebrate Wet Specimen Label
DOI Vertebrate Wet Specimen Label

The fields map from the corresponding fields on the catalog record screen with the following exceptions:

Report Field	*Maps From*
Original Fixative	Preparation/Treatment associated module

Preservative	Preparation/Treatment associated module

Note: You must complete the Notes field manually. To print the tall narrow format of this label, choose 10-500T.

**Vertebrate Specimen Label*

Select the appropriate report for your unit:

10-501 Vertebrate Specimen
DOI Vertebrate Specimen

The fields map from the corresponding fields on the catalog record screen with the following exception:

Report Field	***Maps From***
Prepared By	Preparation/Treatment associated module

Note: To save paper, the 10-501 will print in columns if you choose 10-501c.

**Skull Vial or Box Label*

Select the appropriate report for your unit:

10-502 Skull Vial-box Label
DOI Skull Vial-box Label

The fields on this label map from the corresponding fields on the catalog record screen.

Note: To save paper, the 10-502 will print in columns if you choose 10-502c.

**Invertebrate Specimen Label*

Select the appropriate report for your unit:

10-503 Invertebrate Specimen Label
DOI Invertebrate Specimen Label

The Group field maps from the Class field. The Phylum maps from the Phylum/Division field. The Family maps from the Family field. The fields map from the catalog record screen with the following exceptions:

Report Field	***Maps From***
Original Fixative	Preparation/Treatment associated module
Preservative	Preparation/Treatment associated module

Note: You must complete the Taxon and Notes fields manually.

**Geology Collection Label*

Select the appropriate report for your unit:

10-504 Geology Collection Label
DOI Geology Collection Label

The fields on this label map from the corresponding fields on the catalog record screen.

Note: To save paper, the 10-504 will print in columns if you choose 10-504c.

**Paleontology Label*

Select the appropriate report for your unit:

10-505 Paleontology Label

DOI Paleontology Label

The fields on this label map from the corresponding fields on the catalog record screen. You must complete the Notes field manually.

Note: To save paper, the 10-505 will print in small format if you choose 10-505b, or in columns if you choose 10-505c.

**Wet Plant Specimen Label*

Select the appropriate report for your unit:

10-506 Wet Plant Specimen Label
DOI Wet Plant Specimen Label

The fields map from the corresponding fields on the catalog record screen with the following exceptions:

Report Field	***Maps From***
Original Fixative	Preparation/Treatment associated module
Preservative	Preparation/Treatment associated module

**Invertebrate Label*

Select the appropriate report for your unit:

10-507 Invertebrate Label
DOI Invertebrate Label

The Group field maps from the Class field. The Phylum maps from the Phylum/Division field. The Family maps from the Family field. You must complete the Notes field manually. The other fields map from the corresponding fields on the catalog record screen with the following exceptions:

Report Field	***Maps From***
Original Fixative	Preparation/Treatment associated module
Preservative	Preparation/Treatment associated module

Note: To save paper, the 10-507 will print in columns if you choose 10-507c. The **DOI Invertebrate Specimen Label** is a larger format label with the same fields.

**Egg Box Label*

Select the appropriate report for your unit:

10-508 Egg Box Label
DOI Egg Box Label

You must complete the Notes, A.O.U. No., Set Mark, Description of Nest, and Incu. fields manually. The other fields on this label map from the corresponding fields on the catalog record screen.

**Insect Label*

Select the appropriate report for your unit:

10-509 Insect Label
DOI Insect Label

The fields on this label map from the corresponding fields on the catalog record screen.

Note: To save paper, the 10-509 will print extra small if you choose 10-509 Insect Label-Extra Small or in columns if you choose 10-509c Insect Label-Columns and extra small columns if you choose 10-509c Insect Label-Columns-Extra Small. It will also print small in a single narrow column if you choose 10-509T Insect Label.

You can also print a page of blank labels in the extra small columns format by selecting 10-509c Insect Label-Columns-Extra Small.docx. This report is a Word document. Print as you would any other Word document.

**Annotation Label*

Select the appropriate report for your unit:

10-510 Annotation Label
DOI Annotation Label

The Accession Number and Catalog Number map from the catalog record. You must complete the annotation manually.

**Mineral Collection Label*

Select the appropriate report for your unit:

10-511 Mineral Collection Label
DOI Mineral Collection Label

You must complete the Mine field manually. The other fields on this label map from the corresponding fields on the catalog record and accession record.

**Herbarium Collection Label*

Select the appropriate report for your unit:

10-512 Herbarium Collection Label
DOI Herbarium Collection Label

The fields on this label map from the corresponding fields on the catalog record screen. Technical Name maps from the Scientific Name field.

Note: To print a page of blank labels, choose 10-512 Herbarium Collection Label.docx. This is a Word document. Print as you would any other Word document.

4. *How can I find out if I have missing or duplicate catalog numbers?*

To find out if there are gaps or duplicate catalog numbers in your directories, use the Fiscal Year Summary Report option available on the Tools menu. Check the box "Report Missing Catalog Numbers Only" if you only want a report of the missing number ranges.

Note: This report can be run on a tag set or on your whole database.

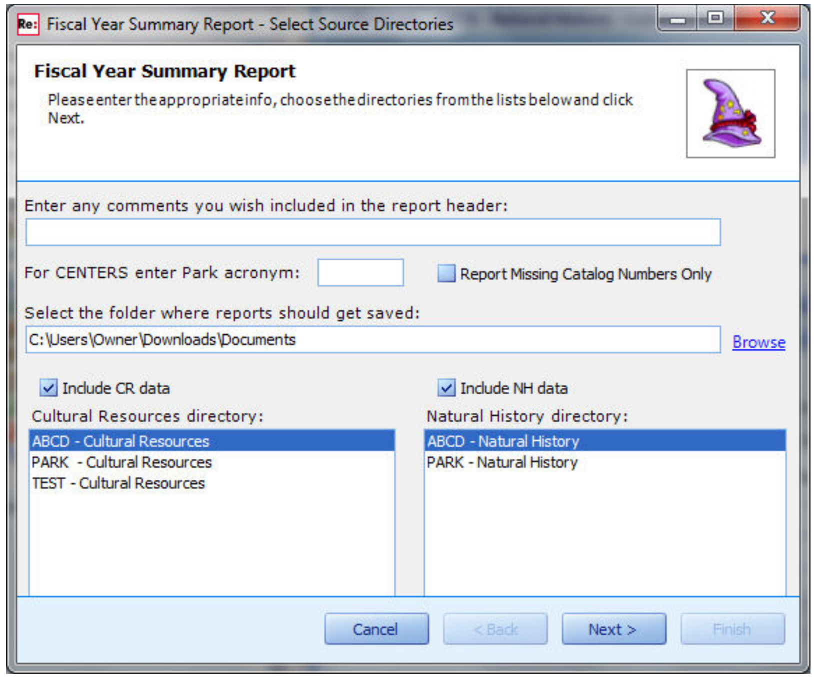
You can also run the Identify Duplicate Records report from the Tools menu if you only want a report of duplicate numbers in catalog records as well as other associated modules. See Section I.5. below for information on the Identify Duplicate Records report.

5. *How do I run the Fiscal Year Summary Report?*

To run the Fiscal Year Summary Report:

- If you want to run the report on a subset of your data, first create a Tag Set in each directory of records for the fiscal year or other group of records.

- Go to the Tools menu and choose Fiscal Year Summary Report.



- On the Fiscal Year Summary Report window, enter any comments in the first field that you want to appear in the report header.

- If you are running the report on directories that contain records from multiple parks (such as at Centers), enter the park acronym in the second field for the park you want to run the report. Leave this field blank if your directories contain only a single park's records or you are running this on a DOI style directory.

- If you want to find only missing catalog number ranges, check the box "Report Missing Catalog Numbers Only". The report will then print only the missing catalog numbers for the directories you select.

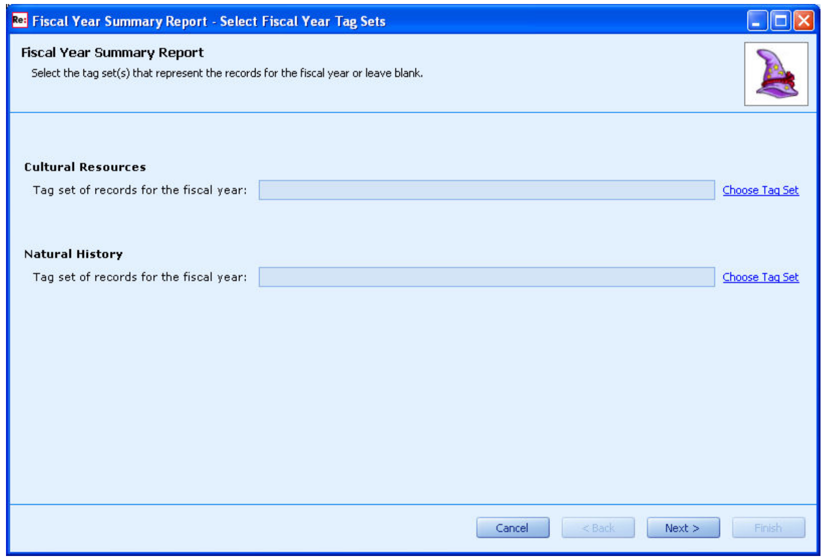
- Select the folder location where you want to save the report. You can either type the path of the folder or click the Browse link to select a folder to save the report.

- To select a directory from Cultural Resources and Natural History, check the Include CR data and Include NH data boxes. Uncheck either of these if you will be choosing only one directory.

- Highlight the director(ies) that contain your data from the Cultural Resources directory list and/or the Natural History directory list.

Note: If you want a complete report of all catalog numbers used or a report of all missing catalog numbers, you should select both your Cultural Resources directory and Natural History directory if your unit has both types of catalog records.

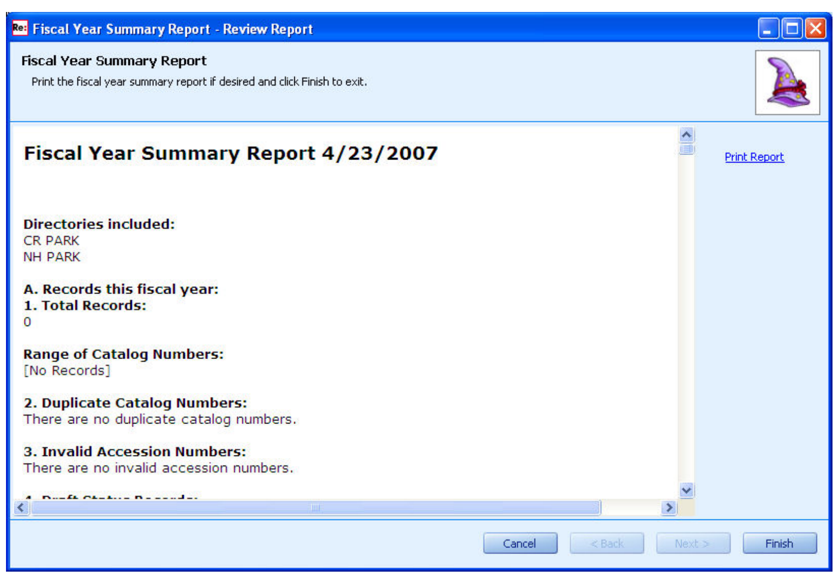
- Click Next.



If you want to run the report…	*Then…*
on a Tag Set in your Cultural Resources and/or Natural History directories,	click the Choose Tag Set link next to each directory type and select the Tag Set from the list.
on all records in the directories selected,	leave these fields blank.

- Click Next.

Note: If you checked the box to "Report Missing Catalog Numbers Only", you will not see this window to select tag sets. The report will automatically run and you will see the next window with the results.



- The Fiscal Year Summary Report will be displayed. You can scroll the report results.

- To print the report, click the Print Report link.

- Click Finish when done.

6. *What information does the Fiscal Year Summary Report include?*

The Fiscal Year Summary Report is the same report run by the National Catalog on NPS catalog submissions. The report is divided into two sections:

- Section A contains information on the catalog records in the Tag Set(s) selected (if any).
- Section B contains information on all catalog records in your director(ies).

The information in each section includes:

- total number of records
- range of catalog numbers used
- duplicate catalog numbers
- invalid accession numbers on catalog records
- draft records

Section B also lists:

- total number of accessions
- range of accession numbers used
- duplicate accession numbers
- the unique item counts, quantities and storage units
- missing catalog numbers

Note: If you checked the "Report Missing Catalog Numbers Only" box, the report will show only the director(ies) and the range of catalog numbers missing.

To find duplicate records within any associated modules and directories, see the Identify Duplicate Records report in Section I.4 below.

7. *What is the Global Record Count report?*

The global record count report provides catalog record statistics by directory for the number of records, item count, quantity and counts by discipline for all collections directories in your system.

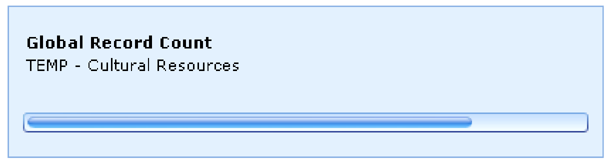
8. *How do I run the Global Record Count report?*

To run the Global Record Count report:

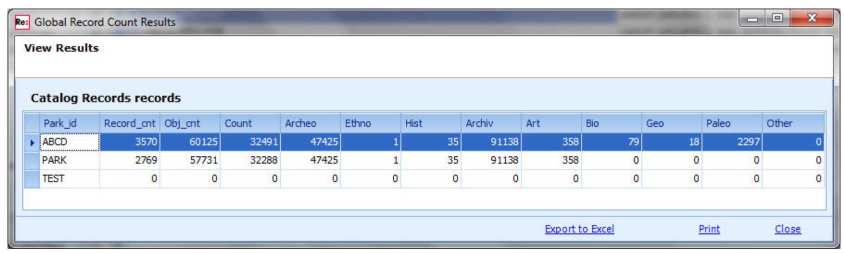
- If you want a global record count for specific types of records in your directories (e.g., Class 1 = Archeology or Object Status = Storage), first set an Advanced Filter in your current directory before running the Global Record Count. (See Chapter 7, Section II for information on creating Advanced Filters.) It will apply this filter to all directories in your system when it runs the report.
- From the Tools menu, select Global Record Count.

- A message will ask if you are sure you want to run the report. Click Yes to run the report.

- The report will process each collections directory. This may take awhile if you have many directories in your system.



- When complete, you will see the Global Record Count Results window.



Park_id	Record_cnt	Obj_cnt	Count	Archeo	Ethno	Hist	Archiv	Art	Bio	Geo	Paleo	Other
ABCD	3570	60125	32491	47425	1	35	91138	358	79	18	2297	0
PARK	2769	57731	32288	47425	1	35	91138	358	0	0	0	0
TEST	0	0	0	0	0	0	0	0	0	0	0	0

Note: If you applied an Advanced Filter when running the Global Record Count, it will indicate the filter used above the table.

To print the report, click the Print link at the bottom of the window. You can also export the report to Excel by clicking the Export to Excel link at the bottom of the window.

9. *What information does the Global Record Count report include?*

The Global Record Count includes the following data:

- Park_id is the name of the directory.
- Record_cnt is the total number of records in each directory.
- Obj_cnt is the total of all Item Counts in each directory.
- Count is the total of all Quantities in each directory.
- Archeo, Ethno, Hist, Art, Archiv, Bio, Geo, and Paleo are the totals separated by discipline. These combine the Item Count and Quantity totals for each discipline.
- Other is used for catalog records that don't have a standard discipline entry in Class 1.

Note: The totals for each discipline and Other columns are calculated just like the CMR (see Appendix H). Any record with a Quantity greater than zero is counted as 1. Item Counts greater than zero are totaled. The Obj_cnt and Count columns are straight totals of all entries in the Item Count and Quantity fields respectively.

D. Accession Forms and Reports

NPS forms and reports begin with '10-'. For other bureau units, use the forms or reports that begin with 'DOI' or your bureau's acronym. Some reports and forms are not bureau specific and can be used department-wide.

1. *Where do I go to print accession forms and reports?*

Go to the Accessions associated module to print accession forms and reports. This section contains a list of the forms and reports available in the Accessions associated module. It also includes a list of the fields that map to the forms. Mandatory forms are marked with an asterisk (*).

2. *What forms and reports are available from the Accessions associated module?*

**Accession Folder Cover Sheet*

Use this form to document the contents of the accession folder. Preprinted folders are no longer available. Print the cover sheet, and place it inside an acid-free folder. Select the form appropriate for your unit:

10-255 Accession Folder Cover Sheet.docx
BOR Accession Folder.docx

The program prints the accession folder cover sheet from your word processing system. You can complete the form manually or on the computer. See Section A.4 above for information on printing Word documents.

**Deed of Gift or Accession Receipt*

Use this form to document gifts to the unit. A copyright statement has been added to this form. The program completes all sections of the form except the signature and date sections. Select the form appropriate for your unit:

10-830 Deed of Gift
BOR Accession Receipt
DOI Deed of Gift
USGS Accession Receipt

Report Field	***Maps From***
Accession Number	Accession Number
Name of Donor(s)	Prefix, First, and Last fields in the name and address record for the Source Individual; Name ID for the Source Institution
Telephone Number	Phone field in the name and address record for the source
Address	Address Line 1 and 2 and the City/St/Zip fields in the name and address record for the source
Description of Objects	Description (10-830 only prints the List of Objects subfield)

Condition	Description (10-830 only prints the List of Objects subfield)
Title	Title field in the NPS Unit or DOI Unit record
Park or Office	Div/Unit field in the NPS Unit or DOI Unit record
Address	Address Line 1 and 2 and the City/St/Zip fields in the NPS Unit or DOI Unit record

Note: For the list of objects with their conditions, enter description and condition in two columns that are thirty spaces apart in the List of Objects subfield of Description.

Use 10-830c Deed of Gift Continuation or BOR Deed of Gift Continuation if the list of objects exceeds 19 lines/items.

To print a blank form, use 10-830 Deed of Gift – Blank.docx and 10-830c Deed of Gift Continuation - Blank.docx which print from your word processing system. You can also print a blank copy of any report by clicking Print Blank Report.

**Accession Receiving Report*

Use this form to document the receipt of accessions. The program completes all sections of the form except the signature and date sections. Select the form appropriate for your unit:

10-95 Accession Receiving Report
BOR Accession Receiving Report
DOI Accession Receiving Report

Report Field	***Map From***
Accession Number	Accession Number
Park or Unit Name	Accession Number - first 4 characters
Attached Form	Custody Document (from Comments field) (complete manually for DOI form)
Nature of Accession	Acquisition Type (complete manually for DOI form)
Name and Address of Source	Name ID, Address Line 1 and 2, and City/St/Zip fields in name and address record for the source
Daytime Telephone No.	Phone field in the name and address record for the source
Description	Description (1st subfield only on 10-95 and BOR forms)
Project Name (10-95 & BOR forms only)	Project Title (from Other Archeo field)
Condition	Condition (from Comments field)

	Remarks	Other Comments (from Comments field)

To print a blank form of 10-95, use 10-95 Accession Receiving Report – Blank.docx which prints from your word processing system.

You can also print a blank copy of any report by clicking Print Blank Report.

**Accession Receiving Report Continuation*

Use this form if you have more than six lines of Description on the Accession Receiving Report. The program completes all sections of the form. Select the report appropriate for your unit:

10-95c Accession Receiving Report Continuation
BOR Accession Receiving Report Continuation
DOI Accession Receiving Report Continuation

Report Field	***Maps From***
Accession Number	Accession Number
Park or Unit Name	Div/Unit in the NPS Unit or DOI Unit record
Description	Description (2nd subfield only for 10-95c and BOR forms)

To print a blank form of 10-95c, use 10-95c Accession Receiving Report Continuation – Blank.docx which prints from your word processing system. You can also print a blank copy of any report by clicking Print Blank Report.

Accession List or Accession Register

Use this report to print a list of accessions. The report includes the accession number, acquisition date, source, catalog record count and a list of the catalog numbers and object names associated with this accession from the current directory. Select the report appropriate for your unit:

Accession List
BOR Accession Register
USGS Accession Register

The **BOR Accession List.docx** is a word document that you complete manually through your word processing system.

Accession Worksheet.docx

Use this form to print a worksheet to use when completing a new accession. This form prints as a Word document.

CMR Accession Verification

Refer to Appendix H: Collections Management Report for information on this verification report. Use it to verify the data that the CMR pulls from your accession records.

CMR Accession Verification - Count by Accession

Refer to Appendix H: Collections Management Report for information on this verification report. Run it on all accession records or a subset of records. Use it to verify the data that the CMR pulls for the fiscal year from your accession records. It provides a total for each accession by discipline with a grand total for all accessions by discipline at the end.

Note: This report replaces the CMR NEW Accession Count for Year. It can be run on any subset of data.

DI-105 Receipt for Property

Use this form to document receipt of museum objects. You can only print a blank DI-105 from the Accession Records associated module.

Missing Required Data for Accessions

The missing required data functions are now more easily accomplished with standard features: from the View menu, Update My List View, choose any of the required fields you want to check for missing data (the required fields vary by module, and by discipline within the Catalog Record screen). With those fields in the List Pane, use Quick Sort or Quick Filter (from the List Pane column headers), to sort or filter the field and Identify records with missing data.

See Chapter 7, Section II.B and Section V for information on Quick Filters and Sorting your data.

Source of Accession

Use this form to print a source of accession record. The program completes all sections of the form.

Source Field	***Maps From***
Source of Accession Name	Name ID for source
Source of Accession Address	Address Line 1 and 2 and City/St/Zip fields in the name and address record for source
Telephone	Phone field in the name and address record for source
Accession Numbers	Accession Number
Description	Description

Note: To print a source of accession record for all the accessions from one source:

- create a tag set or filter for all the records from the source
- print the source of accession for all visible records

E. Outgoing Loan Forms and Reports

NPS forms and reports begin with '10-'. For other bureau units, use the forms or reports that begin with 'DOI' or your bureau's acronym. Some reports and forms are not bureau specific and can be used department-wide.

1. *Where do I go to print outgoing loan forms and reports?*

Go to the Loans Out associated module to print outgoing loan forms and reports. This section contains a list of the forms and reports available in the Loans Out associated module. It also includes a list of the fields that map to the forms. Mandatory forms are marked with an asterisk (*).

2. *What forms and reports are available from the Loans Out associated module?*

**Outgoing Loan Agreement*

Use the outgoing loan agreement to document outgoing loans. You must print both pages of the agreement (see Outgoing Loan Agreement Continuation) and attach the outgoing loan conditions (see 10-127a). Select the form appropriate for your unit:

10-127 Outgoing Loan Agreement

BOR Outgoing Loan Agreement
DOI Outgoing Loan Agreement
USGS Outgoing Loan Agreement

The program completes all sections on the first page of the outgoing loan agreement.

Report Field	***Maps From***
Outgoing Loan Number	Loan ID
Lender or NPS Unit	Div/Unit field in the NPS Unit or Unit record
Street/Box	Address Line 1 and 2 fields in the NPS Unit or Unit record
City, State, Zip	City/St/Zip fields in the NPS Unit or Unit record
Telephone	Phone field in the NPS Unit or Unit record
Fax Number	Fax field in the NPS Unit or Unit record
Superintendent/Responsible Official	First and Last fields in the NPS Unit or Unit record
Shipping Address	Alternate Address fields in the NPS Unit or Unit record
Borrowing Institution / Borrower	Name ID field in the name and address record for the borrower
Department	Div/Unit field in the name and address record for the borrower
Street/Box	Address Line 1 and 2 fields in the name and address record for the borrower
City, State, Zip, Country	City/St/Zip fields in the name and address record for the borrower
Telephone	Phone field in the name and address record for the borrower
Fax Number	Fax field in the name and address record for the borrower
Responsible Official	Responsible Official
Title	Title field in the name and address record for the borrower
Shipping Address	Alternate Address fields in the name and address record for the borrower
NPS Status	(10-127 only) NPS field in the name and address record for the borrower

Purpose of Loan	Purpose (Complete manually for DOI form)
Credit Line	Credit Line
Items/Objects in Loan	Objects
Initiation Date	Start Date
Termination Date	End Date
Date Extension:	(USGS form only) Extension - Date Extended
Insurance Paid By	Insurance Paid By
Insurance Co.	Insurer
Policy No.	Policy
Packer or Loan Shipped by	Packer (complete manually on DOI form)
Shipping Paid By	Shipping Paid by (complete manually on DOI form)
Loan Approved by	(USGS form only) Loan Appr
Loan Prepared by	(USGS form only) Loan Prep
Outgoing Method of Shipping	Shipping Method
Return Method of Shipping	Return Method

Note: For loans of more than a few objects, enter "See Attached List" in the Object field. Attach the List of Objects from the Collection Records Module. Refer to Section C.2 above.

To print a blank form to complete manually, use the 10-127 Blank Outgoing Loan Agreement.docx instead. This prints from your word processing system. Or select the Print Blank Report option for any report.

**Outgoing Loan Agreement Continuation*

This is the second page of the Outgoing Loan Agreement. You must print this report separately. The program completes all sections of this page except for signatures, dates, and the Return of Loan section. Select the form appropriate for your unit:

10-127c Outgoing Loan Agreement Continuation
BOR Outgoing Loan Agreement Continuation
DOI Outgoing Loan Agreement Continuation
USGS Outgoing Loan Agreement Continuation

Report Field	***Maps From***
Loan Conditions	Special
Name of Responsible Official (Borrower) and Title	First, Last, and Title fields in the name and address record for the borrower

Name of Superintendent/ Responsible Official	First, Last and Title fields in the NPS Unit or Unit record
Return Status	Return Status
Extension Termination Date	Date Extended

**10-127a Conditions for Outgoing Loans.docx*

(NPS form) Attach the two-page Conditions for Outgoing Loans to the Outgoing Loan Agreement.

The program prints the conditions from your word processing system. You must add the outgoing loan number in the upper right corner of each page. See Section A.4 above for information on printing Word documents.

Outgoing Loan Folder Cover Sheet

For NPS and BOR, you must maintain your loan documentation in either an outgoing loan folder or the accession folder. Use the outgoing loan folder cover sheet to document the contents of the loan folder, if you use one. Print the cover sheet, and place it inside an acid-free folder. Select the form appropriate for your unit:

10-640 Outgoing Loan Folder Cover Sheet

The program completes sections A-C of the cover sheet. You must complete Sections D and E manually.

Report Field	***Maps From***
Outgoing Loan Number	Loan ID
Termination Date	End Date
Park Name	Div/Unit field in NPS Unit record
Type of Loan	NPS field in the name and address record for the borrower
Borrower	Borrower
Purpose	Purpose
Initiation Date	Start Date
Termination Date	End Date

Note: To print a blank form, use 10-640 Outgoing Loan Folder Cover Sheet – Blank.docx which prints from your word processing system.

BOR Outgoing Loan Folder.docx

This report is a Word document that is completed manually. The program prints the form from your word processing system. See Section A.4 above for information on printing Word documents.

Outgoing Loan Extension

Use the outgoing loan extension to extend an outgoing loan. The program completes all sections of the form except for signatures and date. Select the form appropriate for your unit:

10-641 Outgoing Loan Extension
BOR Outgoing Loan Extension
DOI Outgoing Loan Extension

Report Field	*Maps From*
Outgoing Loan No.	Loan ID
NPS Unit/Unit (Lender)	Div/Unit field in the NPS Unit or Unit record
Street/Box	Address Line 1 and 2 fields in the NPS Unit or Unit record
City, State, Zip	City/St/Zip fields in the NPS Unit or Unit record
Telephone	Phone field in the NPS Unit or Unit record
Fax Number	Fax field in the NPS Unit or Unit record
Borrowing Institution (Borrower)	Name ID field in the name and address record for the borrower
Department	Div/Unit field in the name and address record for the borrower
Street/Box	Address Line 1 and 2 fields in the name and address record for the borrower
City, State, Zip, Country	City/St/Zip fields in the name and address record for the borrower
Telephone	Phone field in the name and address record for the borrower
Fax Number	Fax field in the name and address record for the borrower
Responsible Official	Responsible Official
Title	Title field in the name and address record for the borrower
Original Initiation Date	Start Date
Original Termination Date	End Date
Length of Extension Requested	Extension - Request Len Ext
Items in Loan	Objects
Length of Extension Granted	Extension - Length of Ext (complete manually on DOI form)
Extended Termination Date	Extension - Date Extended (complete manually on DOI form)

Extension Not Granted	Extension - Ext Not Granted (complete manually on DOI form)
Previous Extensions	Extension - Previous Extensions (complete manually on DOI form)
Additional Conditions/ Comment	Extension - Comments (complete manually on DOI form)

Note: To print a blank form, use 10-641 Outgoing Loan Extension – Blank.docx which prints from your word processing system. Or select the Print Blank Report option for any report.

DI-3220 Notice of Potential Hazard in Museum Collections.docx

Print the notice of potential hazards in museum collections for the borrower to sign. This form acknowledges receipt of information on potentially toxic substances in museum collections. It is completed manually. The program prints the from your word processing system. See Section A.4 above for information on printing Word documents.

Outgoing Loan List

Use this report to print loan information along with a list of objects in the loan. Select the form appropriate for your unit:

Outgoing Loan List

This report prints selected fields from the loan record that includes a list of objects in the loan.

BOR Outgoing Loan List.docx

This report is a Word document that is completed manually. The program prints the form from your word processing system. See Section A.4 above for information on printing Word documents.

LOANCOST

Use this report to print the loan cost and value for your outgoing loans. You can run this for a single record or a group of records. It includes a total of the cost and value of all loans included in the report.

F. Incoming Loan Forms and Reports

NPS forms and reports begin with '10-'. For other bureau units, use the forms or reports that begin with 'DOI' or your bureau's acronym. Some reports and forms are not bureau specific and can be used department-wide.

1. *Where do I go to print incoming loan forms and reports?*

Go to the Loans In associated module to print incoming loan forms and reports. This section contains a list of the forms and reports available in the Loans In associated module. It also includes a list of the fields that map to the forms. Mandatory forms are marked with an asterisk (*).

2. *What forms and reports are available from the Loans In associated module?*

**Incoming Loan Agreement*

Use the incoming loan agreement to document incoming loans. You must print both pages of the agreement (see Incoming Loan Agreement Continuation) and attach the incoming loan conditions (see 10-98a). Select the form appropriate for your unit:

10-98 Incoming Loan Agreement
BOR Incoming Loan Agreement
DOI Incoming Loan Agreement
USGS Incoming Loan Agreement

The program completes all sections on the first page of the incoming loan agreement. (The following fields are for the 10-98, BOR and USGS forms. See below for the DOI form fields.)

Report Field	***Maps From***
Accession No.	Accession #
Borrowing Institution or NPS Unit	Div/Unit field in the NPS Unit or Unit record
Street/Box	Address Line 1 and 2 fields in the NPS Unit or Unit record
City, State, Zip	City/St/Zip fields in the NPS Unit or Unit record
Telephone	Phone field in the NPS Unit or Unit record
Fax Number	Fax field in the NPS Unit or Unit record
Superintendent/Director	First and Last fields in the NPS Unit or Unit record
Shipping Address	Alternate Address fields in the NPS Unit or Unit record
Lender	Name ID field in the name and address record for the lender
Department	Div/Unit field in the name and address record for the lender
Street/Box	Address Line 1 and 2 fields in the name and address record for the lender
City, State, Zip, Country	City/St/Zip fields in the name and address record for the lender
Telephone	Phone field in the name and address record for the lender
Fax Number	Fax field in the name and address record for the lender
Responsible Official	Responsible Official
Title	Title field in the name and address record for the lender
Shipping Address	Alternate Address fields in the name and

	address record for the lender
NPS Status (10-98 only)	NPS field in the name and address record for the lender
Purpose of Loan	Purpose
Credit Line	Credit Line
Objects in Loan	Objects
Initiation Date	Start Date
Termination Date	End Date
Insurance Paid By	Insurance Paid By
Insurance Co.	Insurer
Policy No.	Policy
Packer/Shipper	Packer
Shipping Paid By	Shipping Paid by
Outgoing Method of Shipping	Shipping Method
Return Method of Shipping	Return Method

DOI Incoming Loan Agreement (one page only)

Accession No.	Accession #
Received from	First and Last name fields in the name and address record for the lender
Address	Address lines 1-4, City, State and Zip from the name and address record for the lender
Telephone	Phone field in the name and address record for the lender
loan period	Start date and End date fields
Credit Line	Credit Line
Shipping	Address fields from the name and address record for the lender
arrival	Start Date
return	End Date
Shipment via	Ship Method
Special Conditions	Special

(all other fields must be completed manually)

Note: You cannot attach a List of Objects to an incoming loan unless you catalog the objects.

To print a blank form to complete manually, use the 10-98 Blank Incoming Loan Agreement.docx instead. The blank report prints from your word processing program. Or click the Print Blank Report option for any report.

**Incoming Loan Agreement Continuation*

This is the second page of the Incoming Loan Agreement. You must print this report separately. The program completes all sections of this page except for signatures, dates, and the Return of Loan section. (**Note:** The DOI Incoming Loan Agreement does not have a second page.) Select the form appropriate for your unit:

10-98c Incoming Loan Agreement Continuation
BOR Incoming Loan Agreement Continuation
USGS Incoming Loan Agreement Continuation

Report Field	***Maps From***
Loan Conditions	Special
Name of Responsible Official (Lender) and Title	First, Last, and Title fields in the name and address record for the lender
Name of Superintendent/ Responsible Official	First, Last and Title fields in the NPS Unit or Unit record
Return Status	Return Status
Extension Termination Date	Date Extended

**10-98a Conditions for Incoming Loans.docx*

(NPS form) Attach the Conditions for Incoming Loans to the Incoming Loan Agreement.

The program prints the conditions from your word processing system. See Section A.4 above for information on printing Word documents.

Incoming Loan Extension

Use the incoming loan extension to extend an incoming loan. The program completes all sections of the form except for signatures and date. Select the form appropriate for your unit:

10-98b Incoming Loan Extension
BOR Incoming Loan Extension

Report Field	***Maps From***
Accession No.	Accession #
NPS Unit or Unit (Borrower)	Div/Unit field in the NPS Unit or Unit record
Street/Box	Address Line 1 and 2 fields in the NPS Unit or Unit record
City, State, Zip	City/St/Zip fields in the NPS Unit or Unit record

Telephone	Phone field in the NPS Unit or Unit record
Fax Number	Fax field in the NPS Unit or Unit record
Lender	Name ID field in the name and address record for the lender
Department	Div/Unit field in the name and address record for the lender
Street/Box	Address Line 1 and 2 fields in the name and address record for the lender
City, State, Zip, Country	City/St/Zip fields in the name and address record for the lender
Telephone	Phone field in the name and address record for the lender
Fax Number	Fax field in the name and address record for the lender
Responsible Official	Responsible Official
Title	Title field in the name and address record for the lender
Original Initiation Date	Start Date
Original Termination Date	End Date
Length of Extension Requested	Extension - Request Len Ext
Items in Loan	Objects
Length of Extension Granted	Extension - Length of Ext
Extended Termination Date	Extension - Date Extended
Extension Not Granted	Extension - Ext Not Granted
Previous Extensions	Extension - Previous Extensions
Additional Conditions/ Comment	Extension - Comments

Note: To print a blank form, use 10-98b Incoming Loan Extension – Blank.docx or BOR Incoming Loan Extension-Blank.docx which prints from your word processing system.

Incoming Loan List (uncataloged)

Use this report to print a list of objects for the incoming loan if the objects are not cataloged. Select the form appropriate for your unit:

BOR Incoming Loan List
DOI Incoming Loan List

This report pulls the list of objects from the Objects field on the incoming loan record. For the form to print correctly, include the following information in the Objects field: Item Count, Catalog Number (if available), Object/Specimen name, description, and value assigned by the lender.

Note: To print a blank form, use DOI Incoming Loan List.docx or BOR Incoming Loan List.docx which print from your word processing system.

Incoming Loan List (cataloged)

Use this report to print selected fields from the loan record that includes a list of objects in the loan (if the objects are cataloged).

BOR Incoming Loan Folder.docx

(BOR Only) You must maintain your loan documentation in either an incoming loan folder or the accession folder. Use the incoming loan folder cover sheet to document the contents of the loan folder, if you use one. Print the cover sheet, and place it inside an acid-free folder. You must complete this form manually.

The program prints the cover sheet from your word processing system. You can complete the form manually or on the computer. See Section A.4 above for information on printing Word documents.

G. Deaccession Forms and Reports

NPS forms and reports begin with '10-'. For other bureau units, use the forms or reports that begin with 'DOI' or your bureau's acronym. Some reports and forms are not bureau specific and can be used department-wide.

1. *Where do I print deaccession forms and reports?*

Go to the Deaccessions associated module to print deaccession forms and reports. This section contains a list of the forms and reports available in the Deaccessions associated module. It also includes a list of the fields that map to the forms. Mandatory forms are marked with an asterisk (*).

2. *What forms and reports are available from the Deaccessions associated module?*

**Deaccession Form*

Use this form to document deaccessions if your Bureau has deaccessioning authority. The program completes all sections of the form except the signature and date sections. Select the form appropriate for your unit:

10-643 Deaccession Form
BOR Deaccession Form
DOI Deaccession Form
USGS Deaccession Form

Report Field	***Maps From***
Deaccession Number	Deaccession Number
Park Name or Unit	Div/Unit field in the NPS Unit or Unit record (10-643 and DOI forms only)
Deaccession Type	Deaccession Type (complete manually on DOI form)

Disposition of Object Outside SOC	Non-SOC (for 10-643) (Complete manually on DOI form)
Recipient	Recipient (on 10-643 form only)
Objects in Deaccession	Objects (10-643 and USGS), Item List (DOI)
Number of Objects	Total Deaccession
Value	Value
Disposition Document	Disposition Document (complete manually on DOI form)
Attachments	Attachments (complete manually on DOI form)
Notes on Deaccession	Notes
Deaccession Recommended	Recommended Deaccession (complete manually on DOI form)
Disposition Recommended	Recommended Disposition (complete manually on DOI form)
Deaccession Approved	Approved Deaccession (complete manually on DOI form)
Disposition Approved	Approved Disposition (complete manually on DOI form)
Superintendent/Responsible Official/Director	First and Last fields in the NPS Unit or Unit record (complete manually on DOI form)

Note: For deaccessions of more than a few objects, enter "See Attached List" in the Objects field. Attach the List of Objects form from the Collection Records Module. Refer to Section C.2 above.

To print a blank form to complete manually, use the 10-643 Deaccession From - Blank.docx instead. The blank report prints from your word processing program. Or click the Print Blank Report option for any report.

Deaccession Folder Cover Sheet.docx

For NPS and BOR, you must maintain your deaccession documentation in either a deaccession folder or the accession folder. Use this form to document the contents of the deaccession folder, if you use one. Print the cover sheet, and place it inside an acid-free folder. Select the form appropriate for your unit:

10-644 Deaccession Folder Cover Sheet.docx
BOR Deaccession Folder.docx

The program prints the deaccession folder cover sheet from your word processing system. You can complete the form manually or on the computer. See Section A.4 above for information on printing Word documents.

Deaccession Log

Use this form to print a log of deaccessions. You can print this for single or multiple deaccessions. To print a list of multiple deaccessions, activate a tag set or filter to limit the records. Select the form appropriate for your unit:

BOR Deaccession Log
USGS Deaccession Log

The program completes all sections of the form.

**10-99 Conveyance Agreement*

(NPS Only) Use the conveyance agreement to document donations to institutions or organizations that meet the requirements on the form.

The program completes all sections of the form except certification, signature and date sections.

Report Field	***Maps From***
Deaccession Number	Deaccession Number
Conveyance To Name	Recipient
Address (Street/Box)	Address Line 1 and 2 fields in the name and address record for the recipient
City, State, Zip	City/State/Zip fields in the name and address record for the recipient
Telephone	Phone field in the name and address record for the recipient
Fax	Fax field in the name and address record for the recipient
Description	Objects
Park Name	Div/Unit in the NPS Unit record
Park Address (Street/Box)	Address Line 1 and 2 fields in the NPS Unit record
City, State, Zip	City/St/Zip in the NPS Unit record
Fax Number	Fax field in the NPS Unit record
Superintendent	Superintendent
Name and Title of Responsible Official	First, Last, and Title fields in the name and address record for recipient

Note: To print a blank form to complete manually, use the 10-99 Conveyance Agreement - Blank.docx instead. The blank report prints from your word processing program.

**DI-104 Transfer of Property*

Use the transfer of property to document transfers within the Federal government. The program completes the following sections of the form.

DI-104 Field	***Maps From***
Date	Deaccession Date
Transfer From	Div/Unit, Address Line 1 and 2, and

	City/St/Zip fields in NPS Unit or Unit record
Transfer To	Name ID, Address Line 1 and 2, and City/St/Zip fields in the name and address record for recipient
Quantity or Property ID No. and Item Description	Catalog # and Object name from Deaccession Items page
Date Shipped	Ship Date
Official Title	Title field in NPS Unit or Unit record

The program only completes the DI-104 if you have attached the list of objects to the Deaccession Items page. Use the DI-104 Transfer of Property Blank Form.docx to print a blank form to complete manually.

DI-3220 Notice of Potential Hazard in Museum Collection.docx

Print the notice of potential hazards in museum collections for the recipient to sign. This form acknowledges receipt of information on potentially toxic substances in museum collections. It is completed manually. The program prints the from your word processing system. See Section A.4 above for information on printing Word documents.

Exchange Agreement.docx

Use the exchange agreement to document exchanges. Select the form appropriate for your unit:

Exchange Agreement.docx (NPS)

The program prints this two-page exchange agreement from your word processing system. You must add the deaccession number in the upper right corner of each page. See Section A.4 above for information on printing Word documents.

BOR Exchange Agreement
DOI Exchange Agreement

The program prints the deaccession number on the form. To print the second page of this form, select **DOI Exchange Agreement Continuation** or **BOR Exchange Agreement Continuation**.

Repatriation Agreement.docx

Use the repatriation agreement to document repatriations. Select the form appropriate for your unit:

Repatriation Agreement.docx (NPS)

The program prints the two-page repatriation agreement from your word processing system. You must add the deaccession number in the upper right corner of each page. See Section A.4 above for information on printing Word documents.

BOR Repatriation Agreement
DOI Repatriation Agreement

The program prints the deaccession number on the form. To print the second page of this form select **DOI Repatriation Agreement Continuation** or **BOR Repatriation Agreement Continuation**.

Specialist Review Form

Use the optional specialist review form to record the comments and recommendations of the collections advisory committee.

The program completes the following sections of the form.

Report Field	***Maps From***
Description	Notes
Deaccession Type	Deaccession Type
Disposition Type	Non-SOC

H. Visitor Access Forms and Reports

1. *Where do I go to print visitor access forms and reports?*

Go to the Names and Addresses associated module to print visitor access forms and reports. This section contains a list of the forms and reports available in the Names and Addresses associated module. It also includes a list of the fields that map to the forms. All the visitor access forms are optional.

2. *What forms and reports are available from the Names and Addresses associated module?*

BOR Contact Info for Accountable Officers

(BOR only) Use this report to print a list of accountable officers' address, email and phone information. Activate a tag set or filter to run the report on a group of records. The program completes all sections of the report.

BOR Contact Info for Custodial Officers

(BOR only) Use this report to print a list of custodial officers' address, email and phone information. Activate at tag set or filter to run the report on a group of records. The program completes all sections of the report.

Copyright Notice

Print the copyright and privacy restrictions for visitors and researchers to sign. This form is not mapped.

Note: This form is also available in the Archives-Collection Records. See Appendix F: Archives Module.

DI-3220 Notice of Potential Hazard in Museum Collections.docx

Print the notice of potential hazards in museum collections for visitors and researchers to sign. This form acknowledges receipt of information on potentially toxic substances in museum collections. It is completed manually. The program prints the from your word processing system. See Section A.4 above for information on printing Word documents.

Archival Use Record or Collection Use Record

Use this form do document research requests. The program will complete the following sections. Select the form appropriate for your unit:

BOR Collection Use Record
DOI Archival Use Record

Report Field	***Maps From***
Name	First and Last name
Institutional Affiliation	Div/Unit

Office Address	Address lines 1, 2, 3, 4, City, State and Zip
Phone	Phone
Research Topic	Interests
Search Record	Access History

If you need additional room for search record information, also print **DOI Archival Use Record Continuation** or **BOR Collection Use Record Continuation**. Complete the continuation manually.

Duplication Form (Researcher Duplication Form)

Print the researcher duplication form to document duplication requests. The program prints a blank form. This form is not mapped. Select the form appropriate for you unit:

Duplication Form
BOR Duplication Form

MAILING LABEL

Use this report to print mailing labels. The label includes the prefix, first and last name, Name ID, address lines 1 and 2, city, state and zip. Activate a tag set or filter to run the report on a group of records. It will print 3 columns of 1" H x 2" W labels.

Researcher Registration Form

Print the researcher registration form to document research in the collection. The program completes part of the form as follows. Select the form appropriate for your unit:

Researcher Registration Form (NPS)
BOR Researcher Registration Form
DOI Researcher Registration From

Report Field	***Maps From***
Name	First and Last fields in the name and address record for the researcher
Date	Current date from the computer
Institutional Affiliation	Div/Unit in the name and address record for the researcher
NPS Status or Status	NPS/DOI field in the name and address record for the researcher
Work Address	Address Lines 1 and 2, City/St/Zip in the name and address record for the researcher
Phone	Phone field in the name and address record for the researcher
Fax	Fax field in the name and address record for the researcher
E-Mail	Email field in the name and address record for the researcher

Visitor Log

Use the visitor log as a sign-in sheet for visitors to the collection. Select the form appropriate for your unit:

Visitor Log.docx (NPS)

The program prints the form from your word processing system. See Section A.4 above for information on printing Word documents.

BOR Visitor Log
DOI Visitor Log

The program completes all sections of the form. You must enter a name and address record for the visitor to print this form. To print a blank form, click Print Blank Report.

Visitor Log Conditions

Give the conditions for access to museum collections to visitors to the collection. Select the form appropriate for your unit:

Visitor Log Conditions.docx (NPS)

The program prints the conditions for access to museum collections from your word processing system. See Section A.4 above for information on printing Word documents.

BOR Visitor Log Conditions
DOI Visitor Log Conditions

The program prints a blank form. This form is not mapped.

I. Other Forms and Reports

1. *What other forms and reports are available in **ICMS**?*

ICMS contains several other forms and reports that are located as follows:

Form 10-349 & DOI (Inventory of Museum Property)	Refer to Appendix I: Automated Inventory Program.
Form 10-94, BOR & DOI (Collections Management Report)	Refer to Appendix H: Collections Management Report.
Checklist for Preservation and Protection of Museum Collections and related reports	Refer to Appendix J: Automated Checklist Program.
Maintenance Task Sheets and Schedules	Refer to the Maintenance associated module (Section VI of Chapter 4).
Exhibit List	Refer to the Exhibits associated module (Section III of Chapter 4).
NAGPRA Inventory	Refer to the NAGPRA associated module (Section XIII of Chapter 4).
NAGPRA Items	Refer to the NAGPRA associated module (Section XIII of Chapter 4).

Form 10-96 (Folder List)	Refer to Appendix F: Archives Module
Form 10-645 (Separation sheet)	Refer to Appendix F: Archives Module
Finding Aid reports	Refer to Appendix F: Archives Module
Container List for Archives and other archives related reports	Refer to Appendix F: Archives Module

Note: You can also create new reports using the Proficio Reports Designer. See Section V in this chapter.

2. *What is the Image Count report?*

Use the Image Count report on the Tools menu to determine how many images are attached to catalog records in a specific directory.

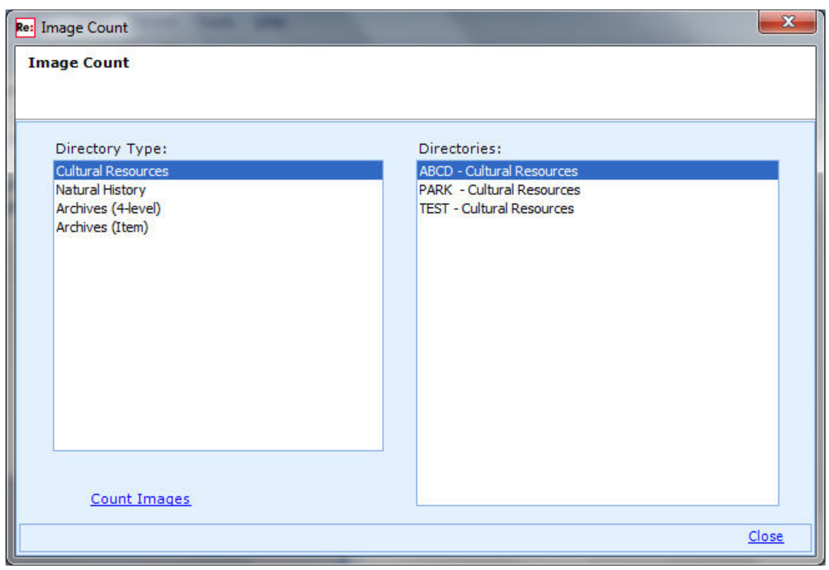
Note: For archives directories, it will count images attached at all four levels (collection, series, file unit and item).

This report does not count images attached to associated module records such as conservation, exhibits, loans in, etc.

3. *How do I run the Image Count report?*

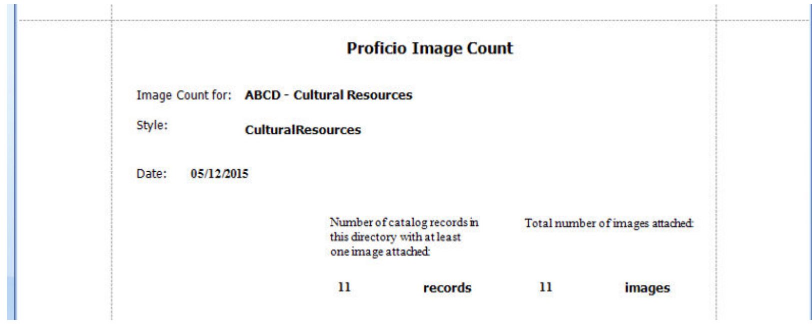
To run the Image Count report, from anywhere in ***ICMS***:

- go to the Tools menu and select Image Count



- select the directory type from the box on the left
- select the directory name from the box on the right
- click Count Images

The preview window for the report opens.



The report includes the following information:

- Directory name
- Directory type/style
- Date the report was generated
- Number of catalog records in this directory with at least one image attached
- Total number of images attached

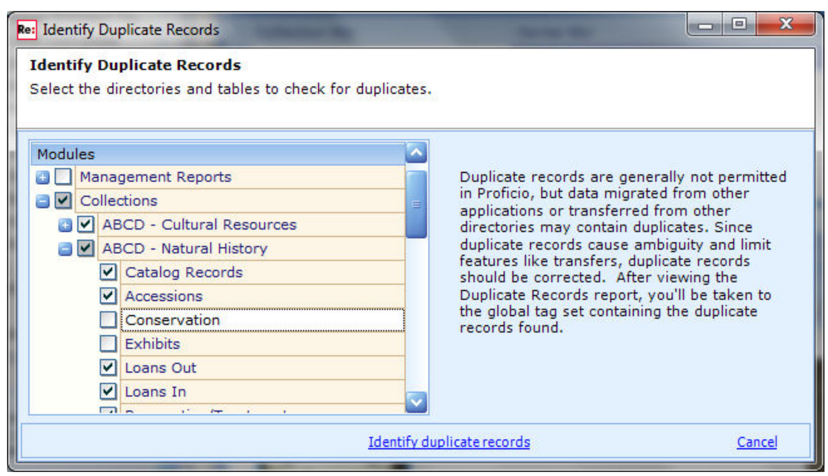
4. *What is the Identify Duplicate Records report?*

The Identify Duplicate Records report on the Tools menu checks each associated module and directory selected for duplicate records. Duplicate records are generally not permitted in **ICMS**, but data migrated from other applications or transferred from other directories may contain duplicates. Since duplicate records cause ambiguity and limit features such as transfers, duplicate records should be corrected.

5. *How do I run the Identify Duplicate Records report?*

To run the Identify Duplicate Records report:

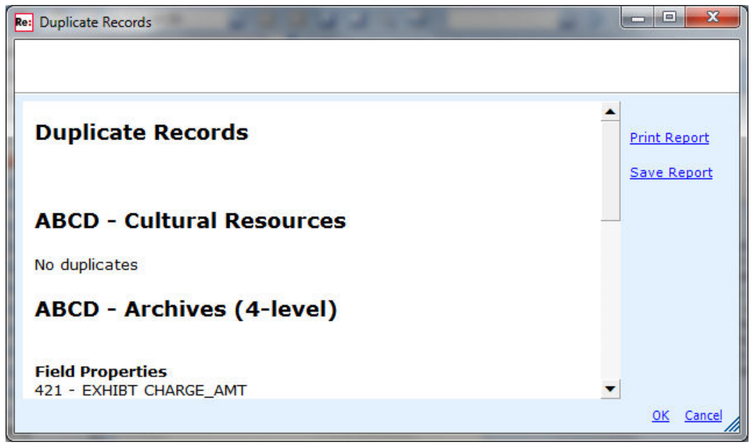
- From the Tools menu, select Identify Duplicate Records



- Expand the options and put a check mark next to the modules, directories, or tables within directories where you want to check for duplicate records
- Click Identify duplicate records

- A progress bar will display as it works. When it is finished, it will tell you how many duplicate records it found and the number of directories and tables involved. Click OK.

- The system will then bring up a report showing each directory, whether or not there were duplicate records, which table has duplicates and which records are duplicates. There are options here to print and/or save the report.



- When you click OK, it will take you to the global tag set view containing the records found.

- Click Generate Local Tag Sets to create tag sets in each associated module where duplicates were found.

You can then go to these associated modules in each directory where duplicates were found and activate the Duplicates tag set to view and correct these records.

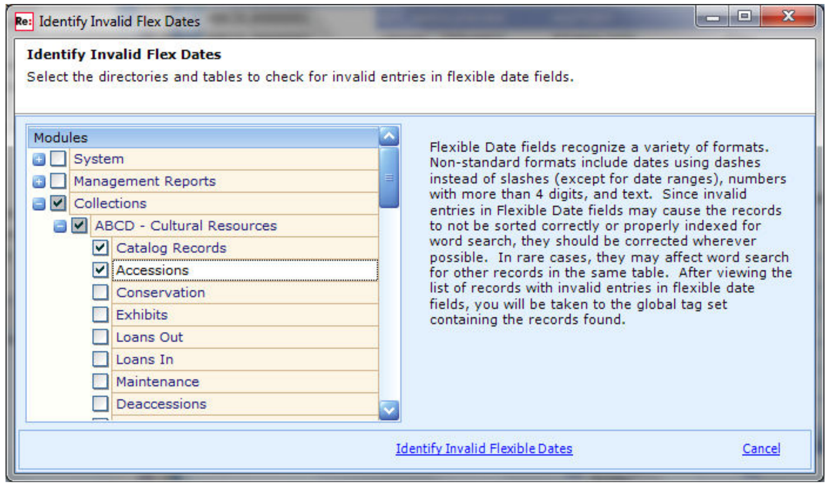
6. *What is the Identify Invalid Flex Dates report?*

Use the Identify Invalid Flex Dates report to locate records that have non-standard entries in flexible date fields such as the Manufacture Date and Use Date fields. Invalid entries include dates using dashes instead of slashes (except for date ranges), numbers with more than 5 digits, and text. Since invalid entries in Flexible Date fields may cause the records to not be sorted correctly or properly indexed for word search, they should be corrected wherever possible.

7. *How do I run the Identify Invalid Flex Dates report?*

To run the Identify Invalid Flex Dates report:

- From the Tools menu, select Identify Invalid Flex Dates.

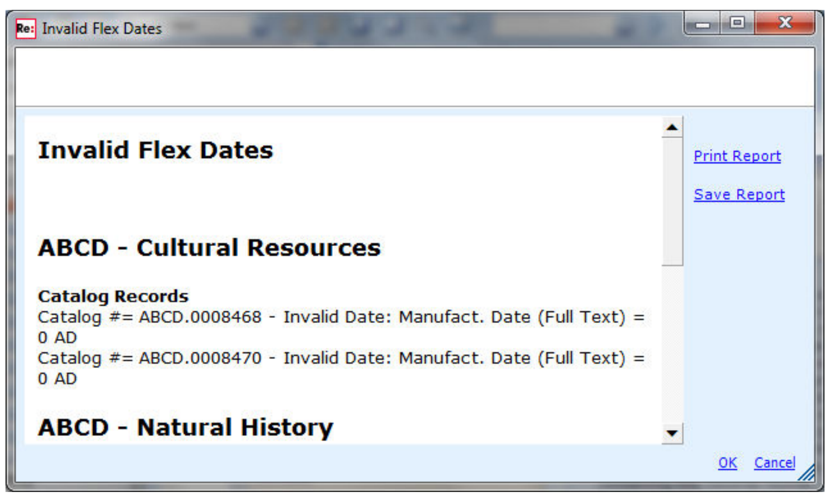


- Expand the options and put a check mark next to the modules, directories, or tables within directories where you want to check for invalid flex dates.

- Click Identify Invalid Flexible Dates.

- A progress bar will display as it works. When it is finished, it will tell you how many records it found with invalid dates. Click OK.

- The system will then bring up a report showing each record, which directory and table it is located in, which flexible date field has an invalid entry, and what that entry is. There are options here to print and/or save the report.



- When you click OK, it will take you to the global tag set view containing the records found.

- Click Generate Local Tag Sets to create tag sets in each associated module where invalid flex dates were found.

You can then go to these associated modules in each directory where duplicates were found and activate the Invalid Flex Dates tag set to view and correct these records.

II. PRINT LIST PANE

A. Overview

1. *What are the Print List and Print Preview buttons?*

Use these functions to send the data in the List Pane to the printer, export the data to a file or send it through email.

2. *When would I use Print List or Print Preview?*

Use the Print List and Print Preview to quickly print or save a list of records you are working with.

3. *Can I select different fields to print or export?*

Yes. Using the Update My List View option on the View menu, you can select which fields you want to view in the List Pane and then print or export them. The Print List and Print Preview will only show the fields that are in the List Pane.

Refer to Section V of Chapter 7 for information on My List View.

4. *Can I include images in the print list?*

Yes. If you select the Show Images in List Pane option from the View menu before printing or previewing the list, the thumbnails will print on the list.

5. *Where can I use the Print List and Print Preview functions?*

You can use Print List and Print Preview in any module or associated module in the program as long as the List Pane is active.

6. *Can I print the item lists that appear on associated module records?*

Yes, you can print the item lists of records attached to various associated module records such as Accessions, Exhibits, Deaccessions, Loans Out, Loans In, and Restrictions. You can also print the associated lists that appear in the ACP Cover, ACP Facility and the Archives Sub-Records tabs. See Section E below for instructions on how to print the item lists.

B. Print the List Pane

1. *How do I print the List Pane?*

To print the data in the List Pane:

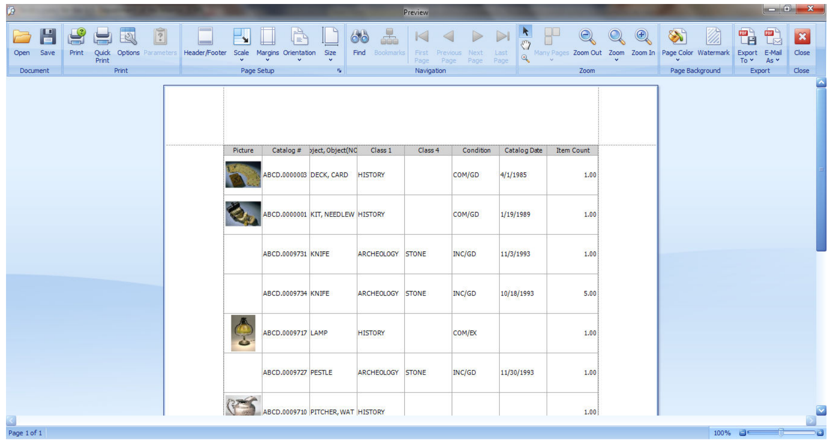
- Activate a tag set, filter or quick filter in the List Pane. If you do not limit your visible data, printing the List Pane will print the entire directory. **Note:** Selecting multiple records in the List Pane <u>does not</u> limit your data for this function. All visible records will still print.
- Click the Print List button  on the button bar, or select Print List from the File menu.

The file will be sent directly to your default printer. There is no preview of the file with this option.

2. *How can I preview the list before I print it?*

To preview the list before sending it to the printer:

- After selecting a subset of your data, click the Print Preview button  on the button bar, or select Print Preview from the File menu.
- The Preview window will open.



- To print the preview, click either the Print button or the Quick Print button on the toolbar in the preview window.

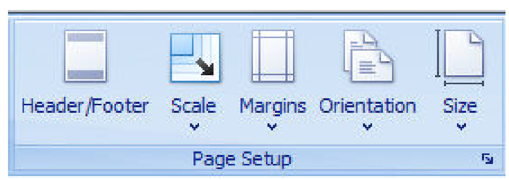
    Print: opens your printer dialog window allowing you to select the printer and printer properties.

    Quick Print: sends the list directly to the default printer as defined in your Windows Printers and Faxes setup.

3. *Can I make any changes to the layout or style of the list?*

Yes, there are several options on the toolbar that allow you to make changes to the layout and style.

From the Page Setup section of the toolbar, you have the following formatting options:



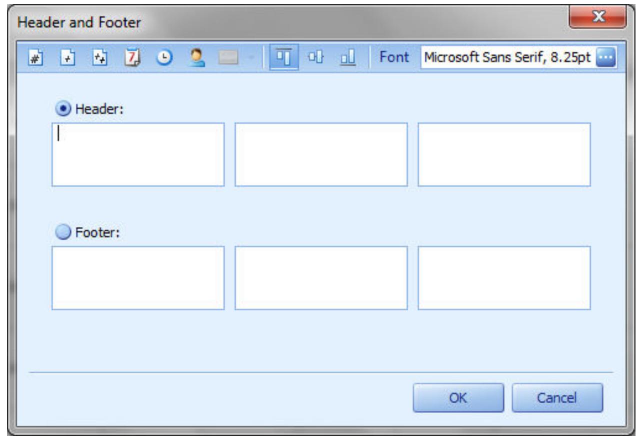
- Margins: select from four predefined margin options (Normal, Narrow, Moderate or Wide) or choose to create custom margins. **Note:** You can also change the margins by clicking and dragging the dotted lines on the page.

- Orientation: select portrait or landscape for the paper orientation.

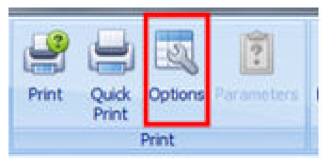
- Scale: to select a percentage of normal size or have it fit on a certain number of pages.

- Size: to select the paper size such as Letter or Legal.

- Header /Footer: to insert text in the header and/or footer sections of the preview. In the Header and Footer window, you can choose the font and alignment of the header or footer text, insert page numbers, date, time, and your user name.

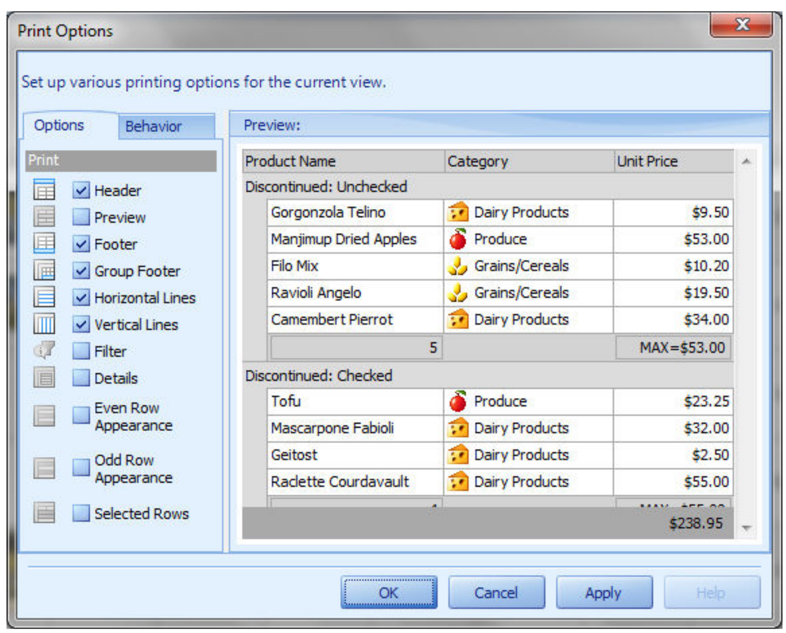


Choose the Options button in the Print section of the toolbar to set up various printing options for the current view.

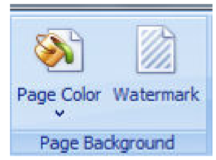


- Options include header and footer bands, group footer, whether to print horizontal and vertical lines, include the filter information, have odd or even rows print in a different color.

- Behavior choices to use Auto Width or Print Styles and expand all details or groups.

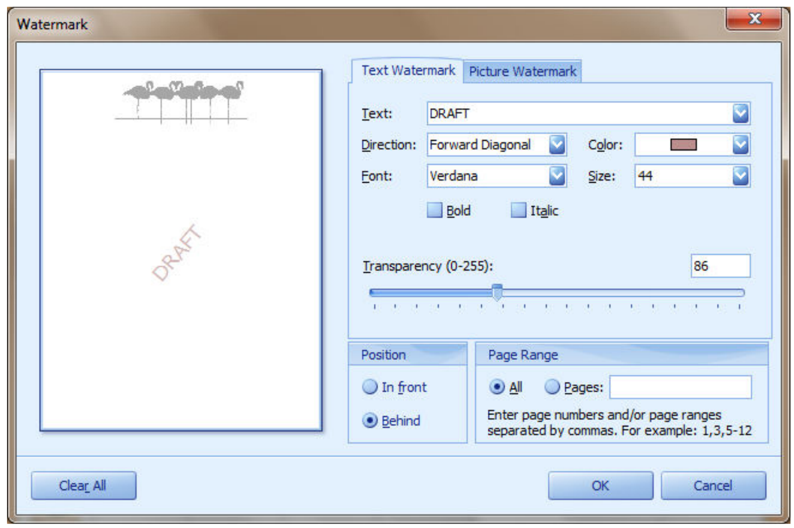


On the Page Background section of the toolbar, you can change the background color or add a watermark to your document.



- Choose Page Color to select from various color options for the background. **Note:** This changes the color of the entire page, not the text or grid.

- Choose Watermark to include a watermark on the page such as text or an image or both.



4. *What are the other preview options?*

In the Preview window you can also:

- Use the Hand button to manually scroll through the pages.

- Zoom, Zoom in and Zoom out with the magnifier buttons.

- Scroll through the pages using the arrow buttons.

- Select multiple pages to view at the same time with the Many Pages button.

- Export To will save the list in various file types.

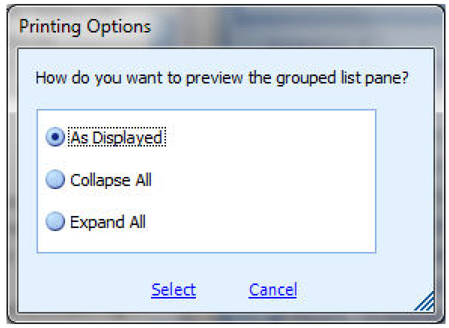
- Email As will export the list to various file types and attach it to an email.

Note: Do not use the Save button on the toolbar. The file format created with this cannot be opened by other common text applications. To save the list, use one of the available Export To file formats. See Section C below.

5. *What are the printing options when I have grouping activated in the List Pane?*

When the List Pane is grouped by a specific field or fields, there are several choices for how the list will print. (See Chapter 7, Section VIII.B. for information on how to group by fields in the List Pane.)

When you click Print Preview or Print List, you have the following options:



- As Displayed will print the list as you currently see it. If you expanded some groups but not others, the list will print it that way.

Accession #	Catalog #
Object, Object(NOM): ABBOTT, WILLIAM L., DESIGN DOCUMENTS FOR (Count=1)	
ABCD.00895	ABCD.0009655
Object, Object(NOM): ABRADER (Count=11)	
ABCD.00685	ABCD.0006928
ABCD.00685	ABCD.0007894
ABCD.00685	ABCD.0007957
ABCD.00685	ABCD.0007971
ABCD.00685	ABCD.0007980
ABCD.00695	ABCD.0008451
ABCD.00695	ABCD.0008452
ABCD.00695	ABCD.0008453
ABCD.00695	ABCD.0008454
ABCD.00695	ABCD.0008455
ABCD.00695	ABCD.0008456
Object, Object(NOM): ABRADER FRAGMENT(Count=1)	
Object, Object(NOM): ABRADER, ACTIVE (Count=3)	
Object, Object(NOM): ABRADER, GROOVED (Count=1)	
Object, Object(NOM): ABRADER, PASSIVE, FRAGMENTED (Count=1)	
Object, Object(NOM): ACHILLE PALADINI --PHOTOGRAPHS (Count=1)	
Object, Object(NOM): ADOBE IMPRESSION (Count=3)	

- Collapse All will collapse any groups that have been expanded and only print the list of group values for the first group level.

Accession #	Catalog #
Object, Object(NOM): ABBOTT, WILLIAM L., DESIGN DOCUMENTS FOR (Count=1)	
Object, Object(NOM): ABRADER (Count=11)	
Object, Object(NOM): ABRADER FRAGMENT(Count=1)	
Object, Object(NOM): ABRADER, ACTIVE (Count=3)	
Object, Object(NOM): ABRADER, GROOVED (Count=1)	
Object, Object(NOM): ABRADER, PASSIVE, FRAGMENTED (Count=1)	
Object, Object(NOM): ACHILLE PALADINI --PHOTOGRAPHS (Count=1)	
Object, Object(NOM): ADOBE IMPRESSION (Count=3)	
Object, Object(NOM): ALABAMA STATE CAPITOL, DESIGN DOCUMENTS FOR (Count=1)	
Object, Object(NOM): ALESSANDRO TOWN PLAN, DESIGN DOCUMENTS FOR (Count=1)	
Object, Object(NOM): ANNE ST., DESIGN DOCUMENTS FOR (Count=1)	
Object, Object(NOM): ANTLER ARTIFACT-FRAGMENT (Count=3)	
Object, Object(NOM): ANTLER-FRAGMENT (Count=6)	
Object, Object(NOM): ANVIL (Count=1)	
Object, Object(NOM): ARCHBALD, JOSEPH A., DESIGN DOCUMENTS FOR (Count=1)	
Object, Object(NOM): ARNOLD, M. A., DESIGN DOCUMENTS FOR (Count=1)	
Object, Object(NOM): ARTIFACT, UNIDENTIFIED (Count=8)	
Object, Object(NOM): ASH (Count=2)	

- Expand All will expand all groups before printing.

Accession #	Catalog #
Object, Object(NOM): ABBOTT, WILLIAM L., DESIGN DOCUMENTS FOR (Count=1)	
ABCD.00895	ABCD.0009655
Object, Object(NOM): ABRADER (Count=11)	
ABCD.00685	ABCD.0006928
ABCD.00685	ABCD.0007894
ABCD.00685	ABCD.0007957
ABCD.00685	ABCD.0007971
ABCD.00685	ABCD.0007980
ABCD.00695	ABCD.0008451
ABCD.00695	ABCD.0008452
ABCD.00695	ABCD.0008453
ABCD.00695	ABCD.0008454
ABCD.00695	ABCD.0008455
ABCD.00695	ABCD.0008456
Object, Object(NOM): ABRADER FRAGMENT(Count=1)	
ABCD.00695	ABCD.0008457
Object, Object(NOM): ABRADER, ACTIVE (Count=3)	
ABCD.00695	ABCD.0008458
ABCD.00695	ABCD.0008459
ABCD.00695	ABCD.0008460
Object, Object(NOM): ABRADER, GROOVED (Count=1)	

C. Export the Preview

1. *In what formats can I save the Preview?*

You have several file format options available to export the print preview:

PDF File (Adobe Portable Document Format)
HTML File (web page)
MHT File (single page web page)
RTF File (Rich Text Format)
XLS File (Microsoft Excel 2000-2003 Workbook)
XLSX File (Microsoft Excel 2007 Workbook)
CSV File (comma-separated value)
Text File (plain text)
Image File (bmp, jpg, gif, etc.)

Note: All options except CSV and Text will include images if images are shown in the List Pane.

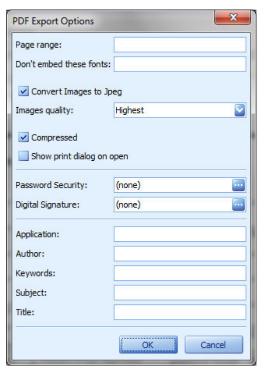
2. *How do I export the preview to a file?*

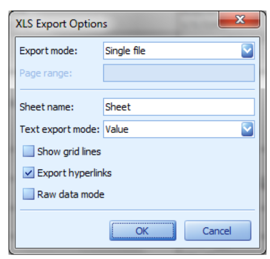
To export the print preview to a file:

- Click on the pull down menu for the Export To button on the toolbar in the Preview window.

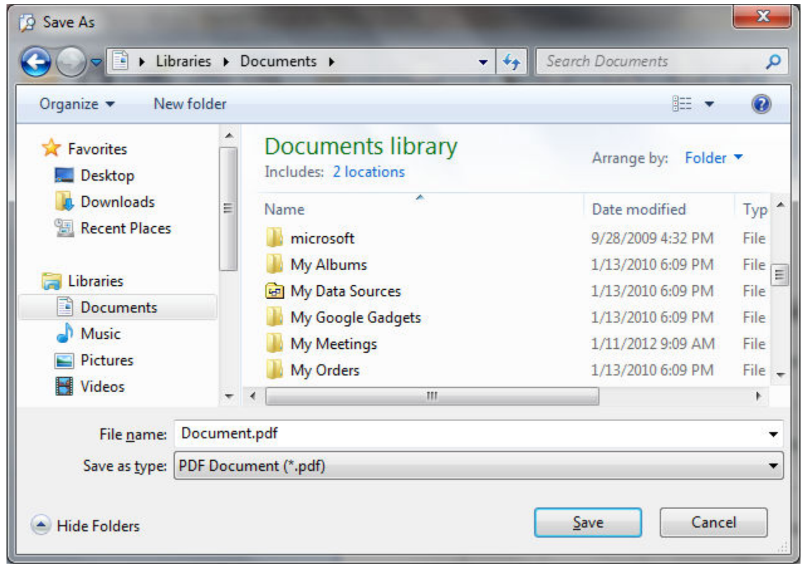
- Choose a file format.

- After selecting the file type you want, an options window will open for that file type. For the most part, you can simply click OK to accept the default options for that file type. Here are examples of the options for the PDF and XLS file types.





- A Save As dialog box will open to allow you to select a location on your workstation or network and name the file. (If you do not change the file name, the default name is "Document" with the file extension of the type you selected.) Click Save.



D. Send the Preview in an Email

1. *What file formats are available for sending the list in an email?*

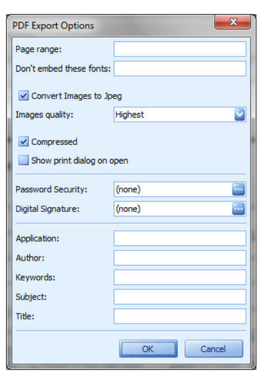
The file formats are almost the same as exporting: (HTML is not included)

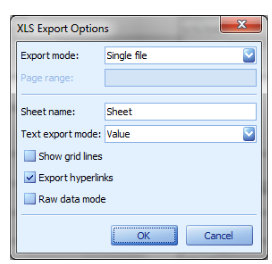
PDF File (Adobe Portable Document Format)
MHT File (single page web page)
RTF File (Rich Text Format)
XLS File (Microsoft Excel 2000-2003 Workbook)
XLSX File (Microsoft Excel 2007 Workbook)
CSV File (comma-separated value)
Text File (plain text)
Image File (bmp, jpg, gif, etc.)

2. *How do I send an email with the print preview list attached?*

To email the preview list to someone:

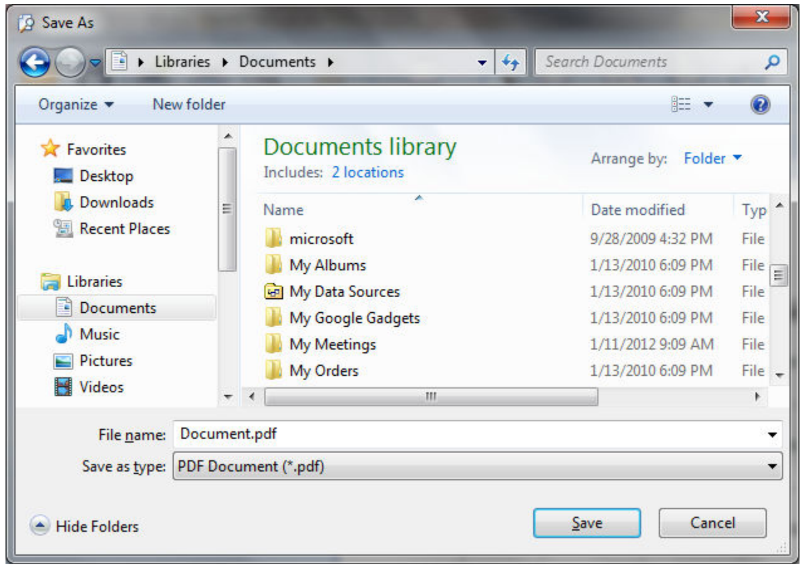
- On the toolbar in the Preview window, click the Email As pull down and select a file format. An options window will open for that file type. For the most part, you can simply click OK to accept the default options for that file type. Here are examples of the options for the PDF and XLS file types.





Note: you must first save the list before you can email it.

- A Save As dialog box will open to allow you to select a location on your workstation or network and name the file. (If you do not change the file name, the default name is “Document” with the file extension of the type you selected.) Click Save.



- Your email program will open automatically in a new message window with the file already attached. You only need to address it and send.

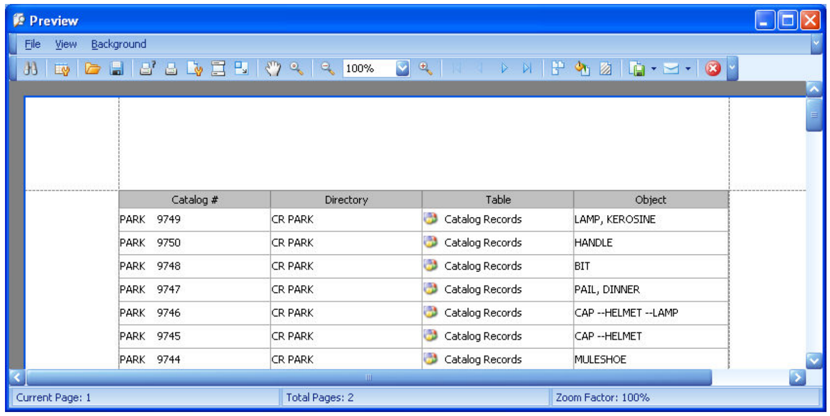
E. Printing Item Lists in Associated Modules

1. *How do I print the item lists attached to associated module records?*

To print the list of items attached to an associated module record,

- Select the associated module in the Navigation Pane or from the directory home page.
- Select the associated module record you want to print the list from.
- Go to the “Items on…” or “…Objects” page (e.g. Items on Loan, Accession Objects, etc.) by pressing Ctrl-N or clicking on the tab.
- Select Print on the right just above the item list.

A preview window will open for you to preview the report.



- To print the preview, click either the Print button or the Print Direct button on the toolbar in the preview window.

Print (): opens your printer dialog window allowing you to select the printer and printer properties.

Print Direct (): sends the list directly to the default printer as defined in your Windows Printers and Faxes setup.

2. *Can I save the item list report?*

Yes, you can export (save) the item list to another file type from the Preview window. See Section C above.

3. *Can I email the item list report?*

Yes, you can email the item list in several formats from the Preview window. See Section D above.

4. *Can I add or remove fields from the item list?*

Yes and no. You can remove columns by right-clicking the column header and choosing Remove This Column. However, you cannot add a new column. **Note:** To get the deleted columns back, you will have to exit the program and then log back in.

You can also rearrange the order and resize the columns. **Note:** Make these changes before you click Print.

- To change the order of the fields, click on a field header and drag it to a new position in the header row.
- To resize the columns, click on the dividing line between the column headers and drag to make it wider or narrower.

5. *Can I make any changes to the layout or style of the list?*

Yes. There are several options on the tool bar in the Preview window for changing the layout and style. See section B.3 above.

III. QUICK REPORT

A. Overview

1. *What is Quick Report?*

Quick Report allows you to create report templates that you can use over and over again to generate reports on your collections. You can create Quick Reports in any module including associated modules.

2. *When will I use this function?*

Use this function when you need to:

- create a list of selected **ICMS** fields (such as a list of all the objects being considered for an exhibit)
- refer to a printed list of data from specific records (such as a list of the catalog numbers and object names for all the objects in a specific storage location)
- save a list to another file format such as PDF, HTML, Text, etc.
- email a list to others in a format they can use outside of **ICMS**

You must run separate reports for CR and NH data. You cannot combine directories.

Tip: For a quick list of a few fields that you do not need to save, use the Print List Pane option described in Section II of this chapter.

3. *Why would I use Quick Report instead of one of the bureau forms?*

With Quick Report, you can choose the fields that you wish to include in your report and produce the report quickly and easily. It gives you the flexibility of deciding exactly which fields you want. You can select what information to include on your reports: up to 25 fields, default image, institutional name, current date/time/day, institutional image, etc. And you can rearrange it to suit your needs.

4. *What steps do I follow to create a Quick Report?*

Producing a Quick Report is a multi-step process. You must:

- Create a subset of your data by performing a Word Search, activating a filter or Tag Set, or selecting multiple records in the List Pane using Shift-click or Ctrl-click. Refer to Chapter 7, Finding & Grouping Records, for information about creating subsets.
- Create a Quick Report template or choose an existing template.
- Run the report. (The system makes a report of the data content of each field in your template. It lists the data for those fields for each record in your visible data.)
- View, print or export the report that you created.

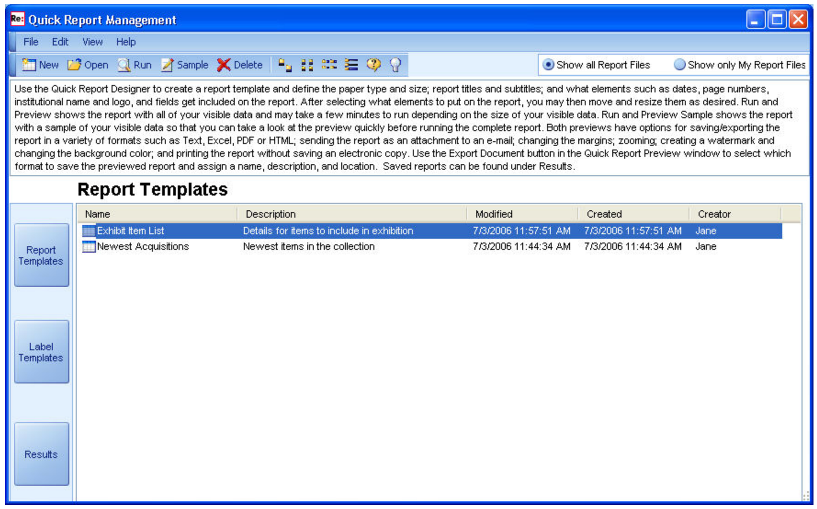
Note: The template you create can be used again and again with different subsets of data.

5. *How do I access the Quick Report function?*

Access Quick Report from any collection record or associated module.

To get to the Quick Report function:

- click the Quick Report button on the button bar, *or*
- select “Quick Report” under Reports on the Record menu



Note: The ability to create Label Templates is Coming Soon.

B. Creating a Quick Report Template

1. *How do I create a Quick Report Template?*

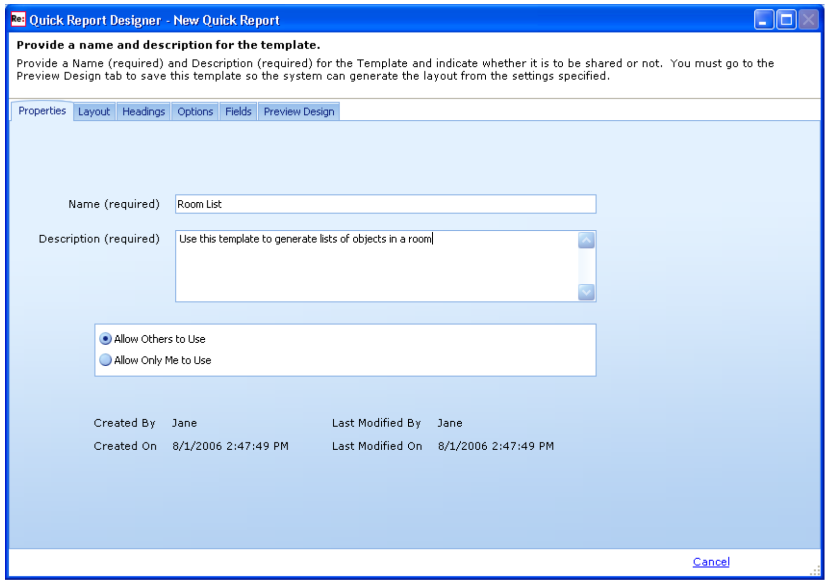
In the Quick Report Management window:

- Select Report Templates along the left edge if it is not already selected.
- Click New on the button bar or select New from the File menu.

This opens the Quick Report Designer window where you define the paper type and size; report titles and subtitles; and what elements such as dates, page numbers, institutional name and logo, and fields to include on the template. Just fill in the information on each tab, saving the Preview Design tab for last. The Preview Design tab is where you can move and resize elements on the template as the last step before saving the template.

Note: You must go to the Preview Design tab to save a template so the system can generate the layout from the settings specified.

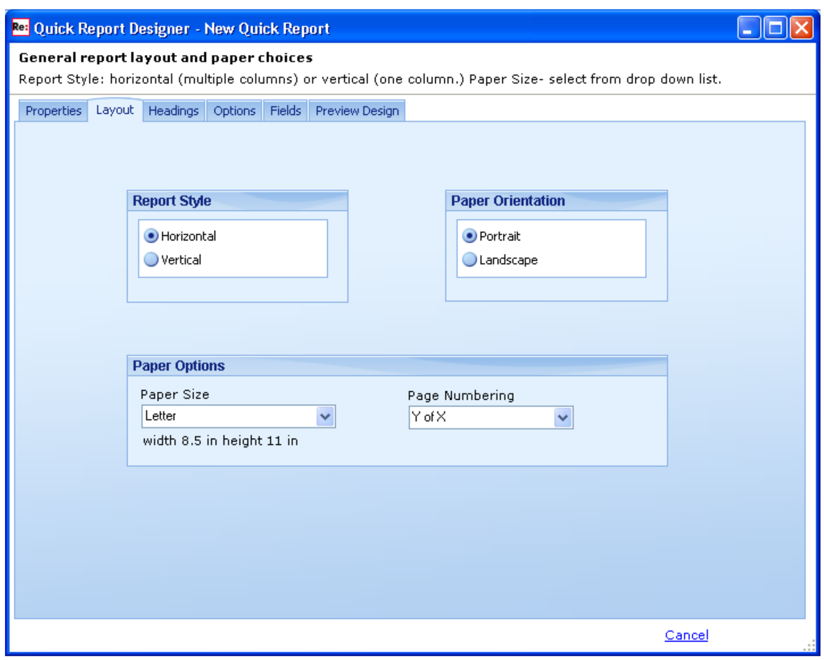
Properties Tab



On the **Properties Tab**,

- Fill in a name and description for the template (these are required).
- Indicate whether or not you want to share this template with other users.
- Click on the Layout tab next.

Layout Tab



On the **Layout Tab**,

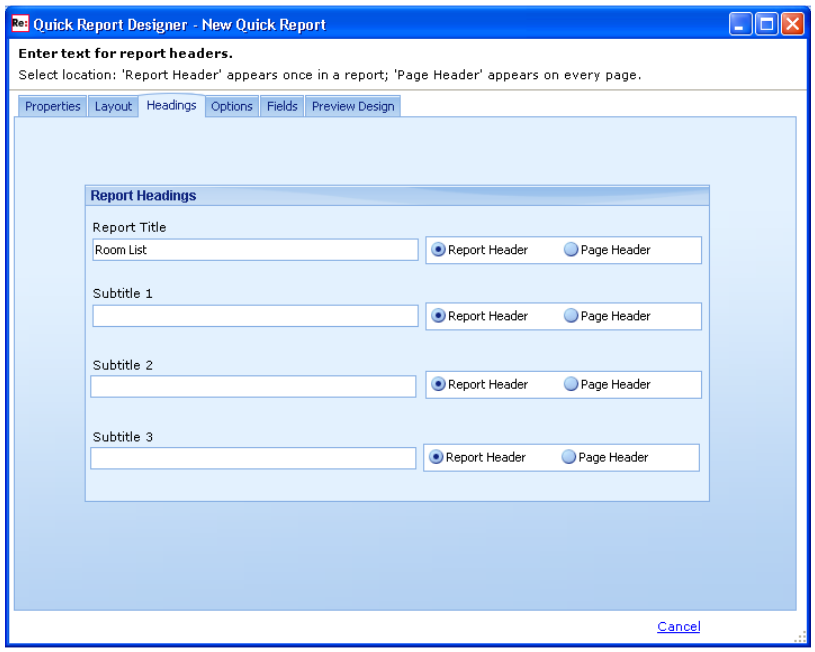
- Choose a Report Style:

  <u>Horizontal</u>: prints in a table/column format. All fields will word wrap and the columns will be the same width so fields with a lot of text like a description may take up a lot of space on the report and push it to several pages.

Vertical: prints the complete contents of each field for each record aligned at the left margin. **Note:** If you choose this option, you cannot make adjustments to the field size and location on the Preview Design tab.

- Choose the Paper Orientation: Portrait or Landscape
- Choose the Paper Options: Letter, Legal, etc
- Choose the Page Numbering style
- Click on the Headings tab next.

Headings Tab



On the **Headings Tab**,

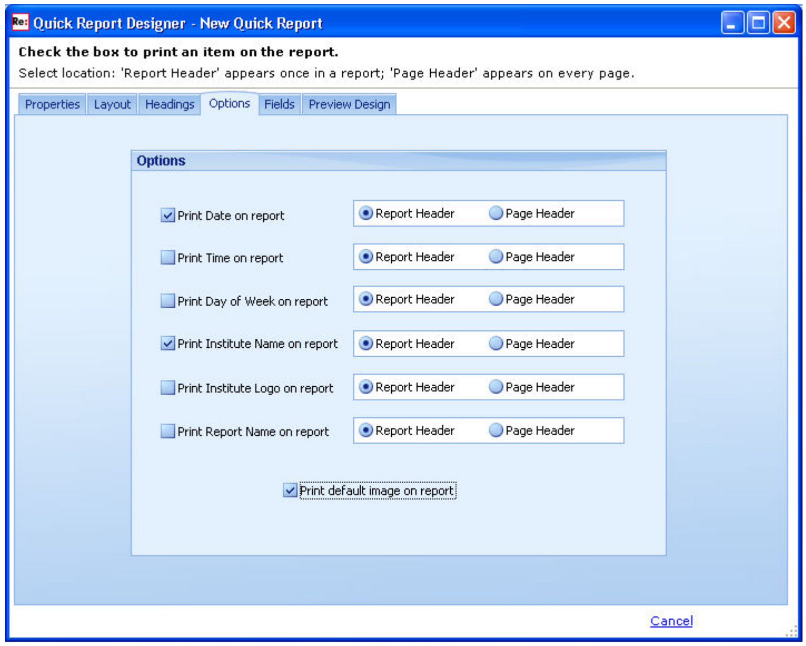
- Specify any title or subtitles to appear on the report and their location on the report.

  Report Header option puts the title in the header of the first page of the report.

  Page Header option puts the title in the header of every page.

- Click on the Options tab next.

Options Tab



On the **Options Tab**,

- Select any of the options desired and their location on the report.

  Report Header option puts the information in the header of the first page of the report.

  Page Header option puts the information in the header of every page.

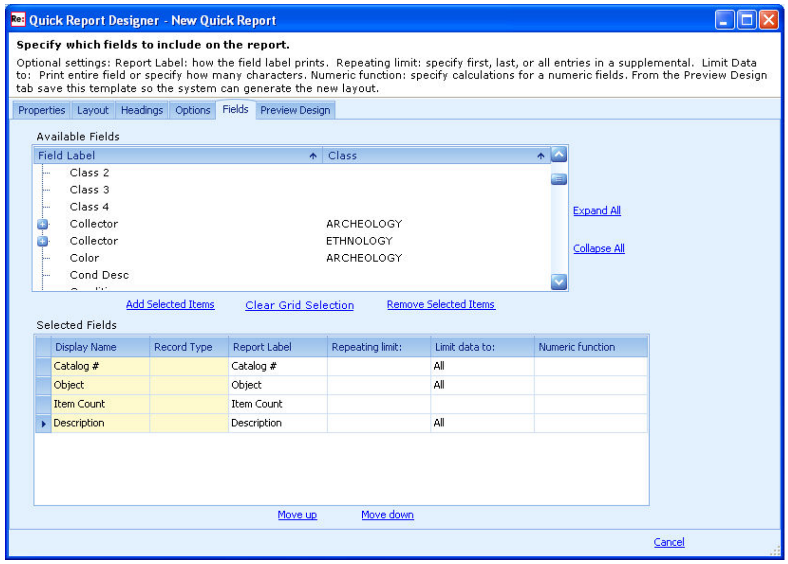
Note: Institute Name will be the name on the title bar (Rediscovery for the U.S. Department of the Interior) and Institute Logo will be the DOI logo. The Report Name is the name of the quick report template that you entered on the Properties tab.

- Select whether to include images on the report.

Note: The default image is the first image displayed on the Images tab with each record.

- Click on the Fields tab next.

Fields Tab

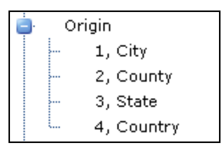


Adding fields to the template

On the **Fields Tab**, specify which fields to include on the report.

- In the Available Fields list, highlight the field(s) you want to include in the report. You can use Shift-Click and Ctrl-Click to select multiple fields.

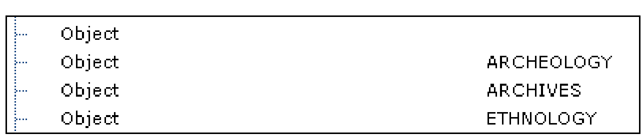
  For formatted memo and repeating formatted memo fields, you can select the entire field or individual subfields. To select a subfield, expand it in the list by clicking the blue plus sign next to it and select individual subfields.



  Supplementals appear at the end of the Available Fields list in all capitals. Each supplemental subfield is listed individually.

  Note: Use Expand All and Collapse All to expand and collapse all formatted memo and repeating formatted memo fields in the list.

  Some fields are associated with a particular Class (or discipline) and you will see the Class listed in the list of Available fields. If you select a field associated with a particular class, it will only print on the report for records of that same discipline. Some fields may appear more than once if they are associated with multiple disciplines. For instance, in the illustration below, the Object field is listed for Archeology, Ethnology, Archives, and a blank class.



  If you select Object for the Archeology class, then the data from the Object field will print only for records whose class is also Archeology. If you select Object where the class is blank, the Object field will print for all records.

- Click Add Selected Items to add the highlighted items to the Selected Fields list.

Changing the field order

To rearrange the field order, highlight a field in the Selected Fields list and use **Move up** and **Move down** to move it to a different location.

Removing fields from the template

To remove a field from the Selected Fields list:

- highlight the field in the Selected Fields list
- click Remove Selected Items

Changing a report label

To change how the field label displays and prints on the report:

- In the Selected Fields list, click on the Report Label for the field you want to change.
- Enter a new label to appear on the report.

Repeating Limit

Specify whether the first, last, or all entries in a supplemental or repeating formatted memo print on the report. This option is only available for repeating fields (supplementals and repeating formatted memos).

Changing the field length

Use the "Limit Data to" column in the Selected Fields list to specify whether the entire field prints on the report or only a certain number of characters. Select a number from the pull down list for the field.

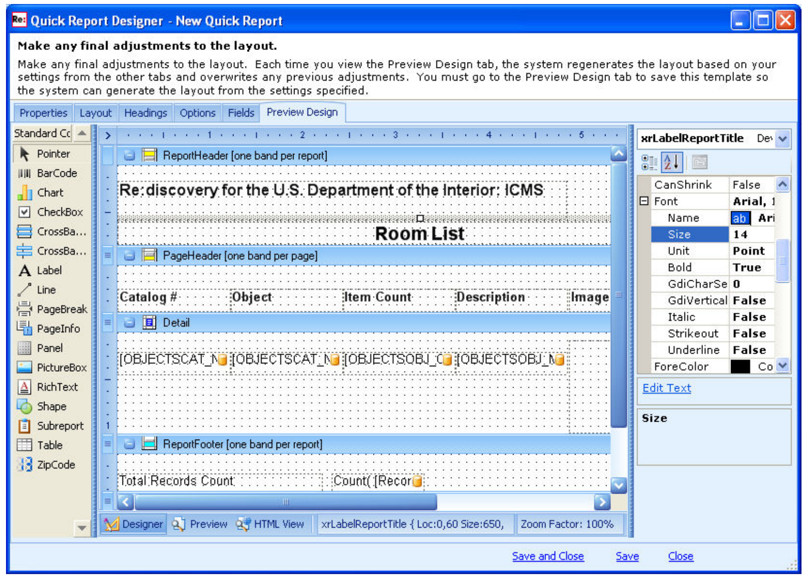
Note: If you use the Horizontal style and include a memo field that contains a lot of text, like a Description field, you may want to limit how much of that text prints on the report in order to save paper by not printing the entire contents of lengthy fields.

Numeric function

Use the "Numeric function" column to specify any calculations for a numeric field. Leave this blank if you do not want any calculations. Choose from Average, Count, Maximum, Minimum or Total in the pull down list. This option is only available for numeric fields.

Preview Design Tab

Once you've selected all the elements and fields to include in your template, click the Preview Design Tab. It will take a moment to generate the layout based on your choices. As it is working, you will see "Loading . . ." in the lower left corner of the window. When it finishes generating the template layout, it will display in the tab.



There are 3 views available on this tab. Choose one of the options in the lower left of the layout box:

- Designer: Allows you to change the layout, font, colors and other features in the quick report.

- Preview: Allows you to see the report as it will appear when printed. No data is visible in this view – only the headers, footers and field labels.

- HTML View: Shows the report in an HTML window.

Designer View

On the Designer view, you can make any final adjustments to the physical layout if desired.

Each time you go to a different tab (Fields, for example, to add another field) and then return to the Preview Design tab, the system regenerates the layout based on your settings from the other tabs and overwrites any previous adjustments.

Report Header Band

Shows the report headers you chose on the Headings and Options tabs.

Page Header Band

Shows the page headers you chose on the Headings and Options tabs and includes the field labels for the fields you chose.

Detail

Shows the layout of the data fields. These fields will begin with the name of the table they are associated with and then the name of the field.

Making changes to the layout

You can make changes to the layout by selecting an item in one of the bands that you want to change.

- To change the location, click and drag the item to a new location in the band. You can also use the arrow keys to make minor adjustments to the position. **Note:** If you chose the Vertical option on the Options tab, you will not be able to move the fields in the detail band.

- To change the font, click on an item. In the Tools box on the right, scroll through the list and locate the Font option. Select a new font by clicking on the button to the right of the Font name that appears in the Font box.

- To remove an item, select it and press Delete.

- To change the size of an item, select it and use the mouse to drag the edges of the box to shrink or enlarge the item. **Note:** If you chose the Vertical option on the Options tab, you will not be able to resize the fields in the detail band.

When finished, click **Save and Close** to save the template. You will return to the Quick Report Management window and will see your new template in the list.

2. *How do I edit an existing Quick Report template?*

You can edit an existing template to change any of the fields or elements that appear on the report and to make adjustments to the layout.

To edit an existing template, from the Quick Reports Management window:

- Select the template in the list in the Report Templates list.
- Click the Open button  or select Open on the File menu.

- The template will open in the Quick Report Designer.

- To just make adjustments to the layout itself, use the Preview Design tab. If you need to make changes from any other tab, you can click on that tab, make any necessary changes, and then return to the Preview Design tab to save your template. If you open a template and leave the Preview Design tab, when you return the system will regenerate the layout overwriting any previous adjustments. You can readjust the layout if necessary.

Note: You must go to the Preview Design tab to save the report. If you click Cancel on any of the other tabs, the changes you make will be lost.

- Choose one of the following save options when editing a template:

Save as New – Use this save option if you want to create a new template from an existing template. If you edit a template and change the name on the Properties tab, this option appears on the Preview Design tab. If you choose this save option, the system will create a new template with any changes you made and with the name you entered on the Properties tab. The original template that you opened will remain unchanged.

Save and Close – Use this save option if you want to overwrite the template you opened. If you change the name of that template on the Properties tab, the system will rename and overwrite the existing template with the new name you entered on the Properties tab.

3. *How do I delete a Quick Report template?*

To delete a Quick Report template:

- In the Quick Reports Management window, select the template on the Report Templates list.

- Click Delete on the button bar. The template will be deleted.

4. *Can I transfer Quick Report templates to other directories?*

Yes. Quick Report templates created for catalog records can only be transferred between like modules/directories as the one in which they were created. For example, if you create a new Quick Report template for catalog records in a Cultural Resources or Natural History style directory, you may only transfer it into another Cultural Resources or Natural History style directory. Likewise, a Quick Report template created in a 4-level Archives directory can only be transferred into another 4-level Archives directory, and so on.

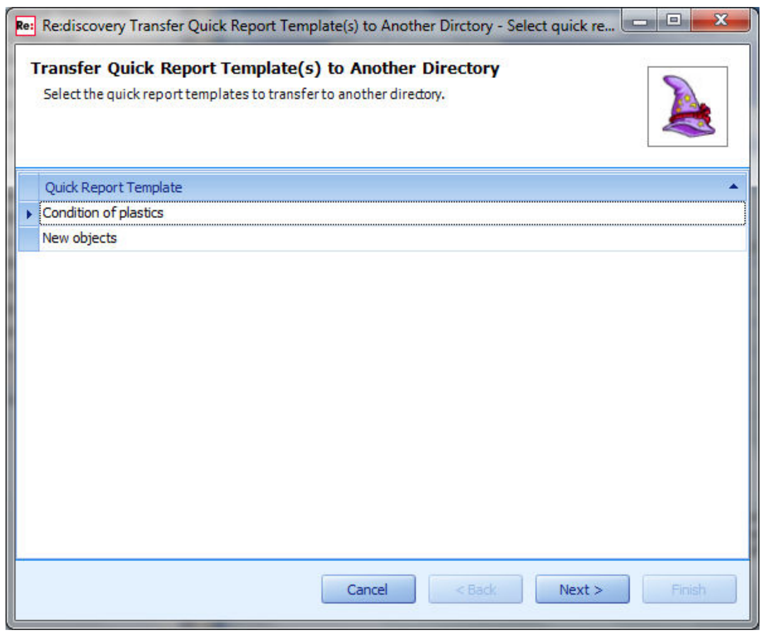
Quick Report templates created in most of the associated modules can be transferred to any of the directory styles that have the same associated modules.

5. *How do I transfer Quick Report templates to another directory in the same system?*

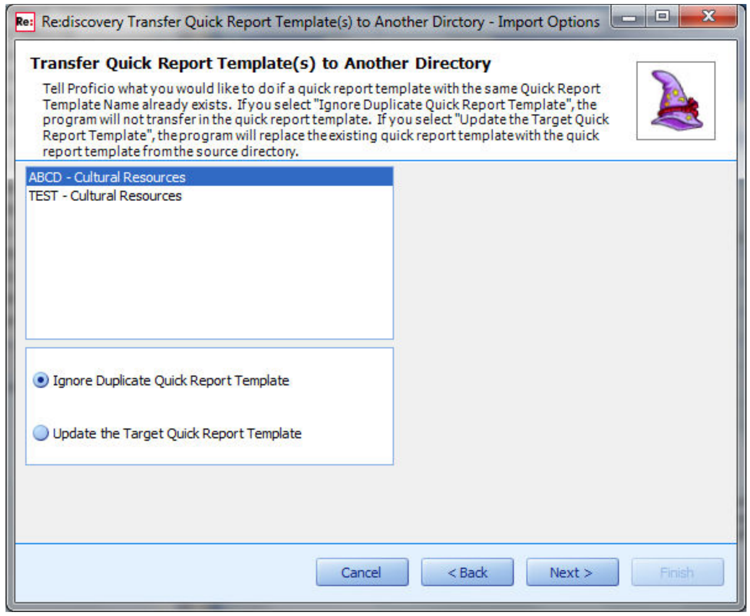
To transfer Quick Report templates to another directory:

- From the Record menu, select Reports then Quick Report and then Transfer Template(s) to Another Directory

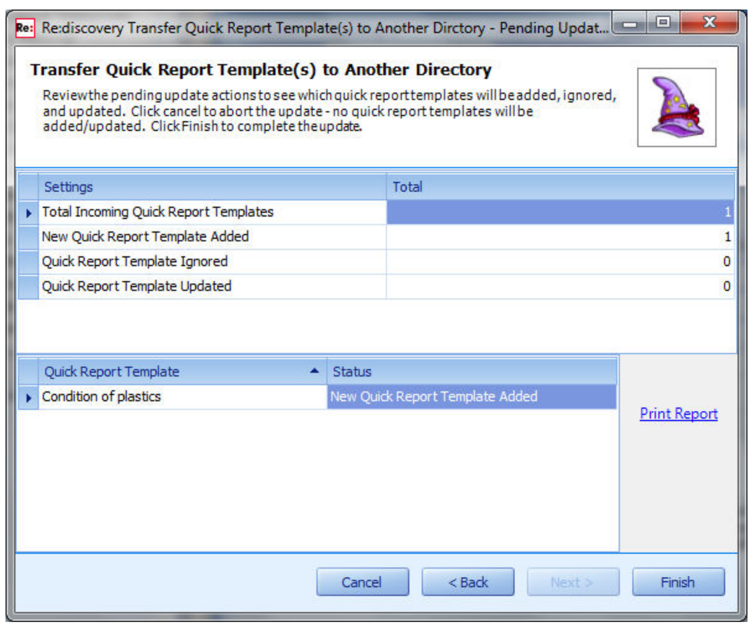
- A list of your existing Quick Report templates will display.



- Highlight the Quick Report template you want to transfer. You may select multiple Quick Report templates by holding down the CTRL key and clicking on additional ones until you have highlighted all desired Quick Report templates. Then click Next.



- Highlight which directory you want to transfer the Quick Report templates to. Then select an option for duplicate Quick Report templates (i.e., ones that may already exist in that directory with the same name as those you are transferring in). Then click Next.



- The program will display a summary of the incoming Quick Report templates, including their names and whether they will be newly added or updated. Click Finish.

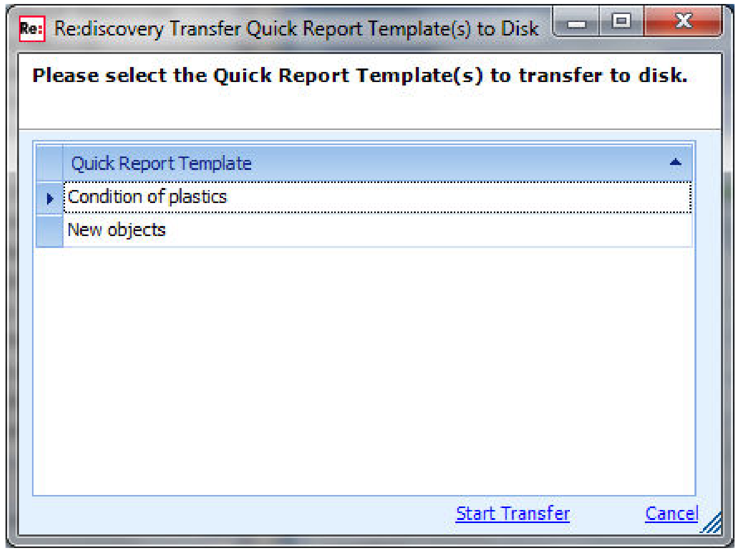
- When the transfer is complete, click OK.

6. *How do I transfer Quick Report templates to another ICMS system?*

To transfer existing Quick Report templates from one copy of ICMS to another:

- From the Record menu, select Reports then Quick Report and then Transfer Template(s) to Disk.

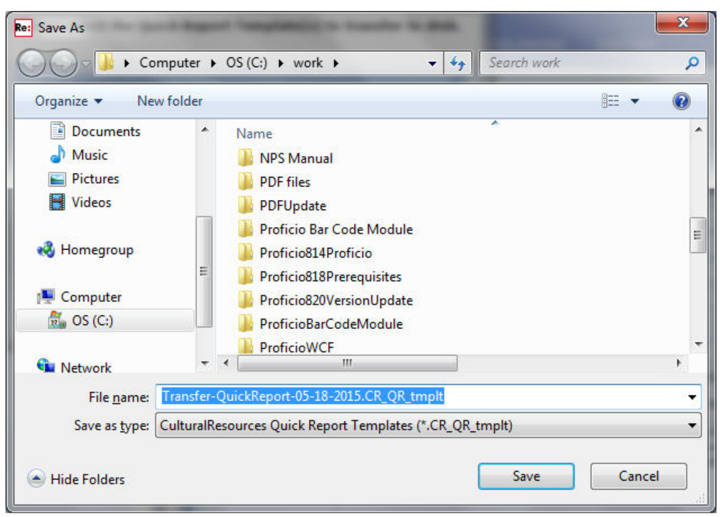
- A list of your existing Quick Report templates will display.



- Highlight the Quick Report template you want to transfer. You may select multiple Quick Report templates by holding down the CTRL key and clicking on additional ones until you have highlighted all desired Quick Report templates.

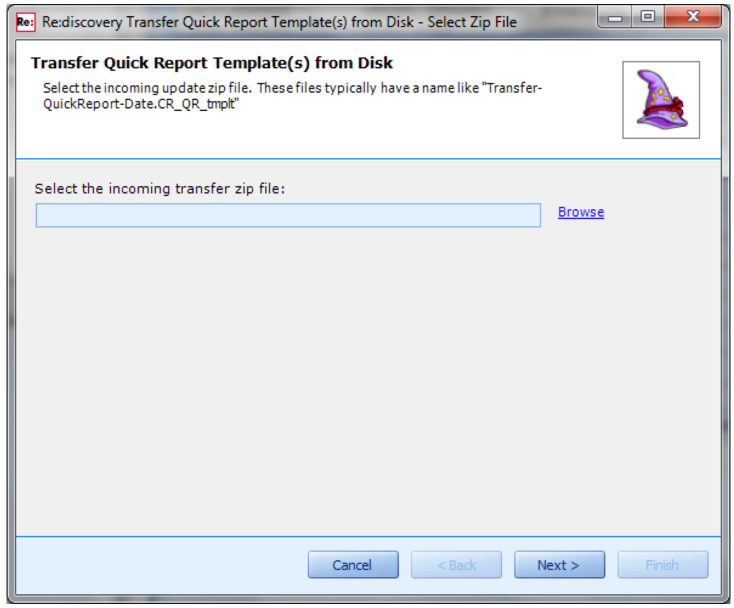
- Click on the Start Transfer link.

- Change the location as desired. You may keep the default File name or change it, but you MUST leave the default Save as type. Then click Save.

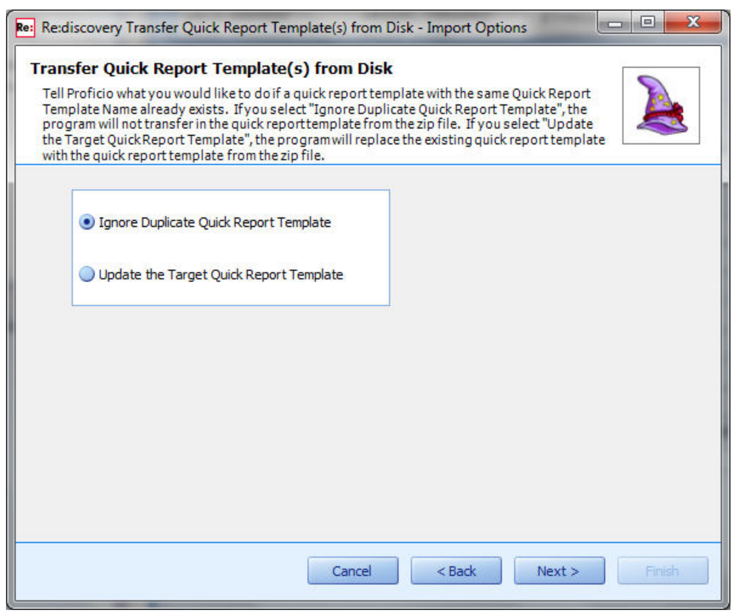


- When the transfer is complete, click OK. You can send the file to another user to load into their **ICMS** system.

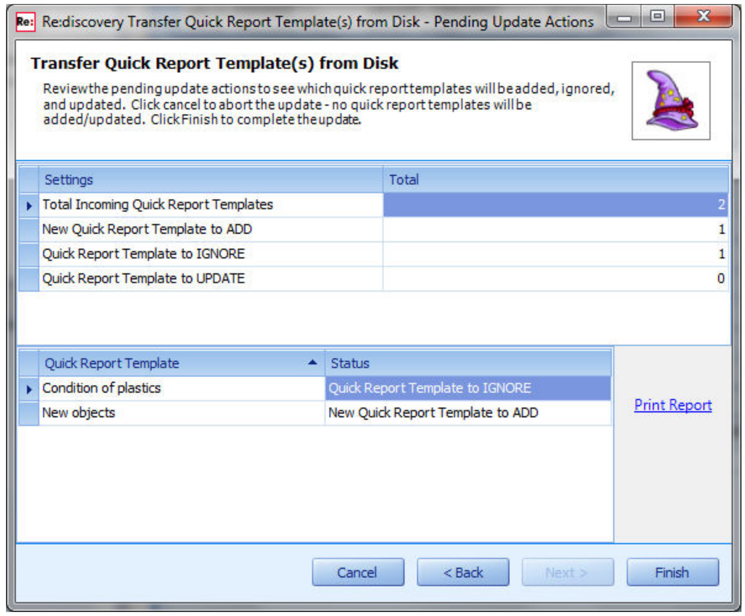
- To load the template(s), in the **ICMS** system that you want to transfer the Quick Report templates into, from the Record menu, select Reports then Quick Report and then Transfer Template(s) from Disk.



- Use the Browse link to navigate to the transfer file you created above, select it and click Open. Then click Next.



- Select an option for duplicate Quick Report templates (i.e., ones that may already exist in this **ICMS** system with the same name as those you are transferring in). Then click Next.



- The program will display a summary of the Quick Report templates being brought in, including their names and whether they will be newly added or updated. Click Finish.

- When the transfer is complete, click OK. The Quick Report template is now available for use in that directory.

C. Running a Quick Report

1. *How do I run the Quick Report?*

Once you've created a template, you can use it over and over again to generate reports that look the same but are run on different data sets. Create a subset of your records using Quick Search, Advanced Search, Quick Filter, Advanced Filter, or by selecting multiple records in the List Pane using Shift-Click or Ctrl-Click. When you run a Quick Report, it only runs on the visible data.

To run a Quick Report:

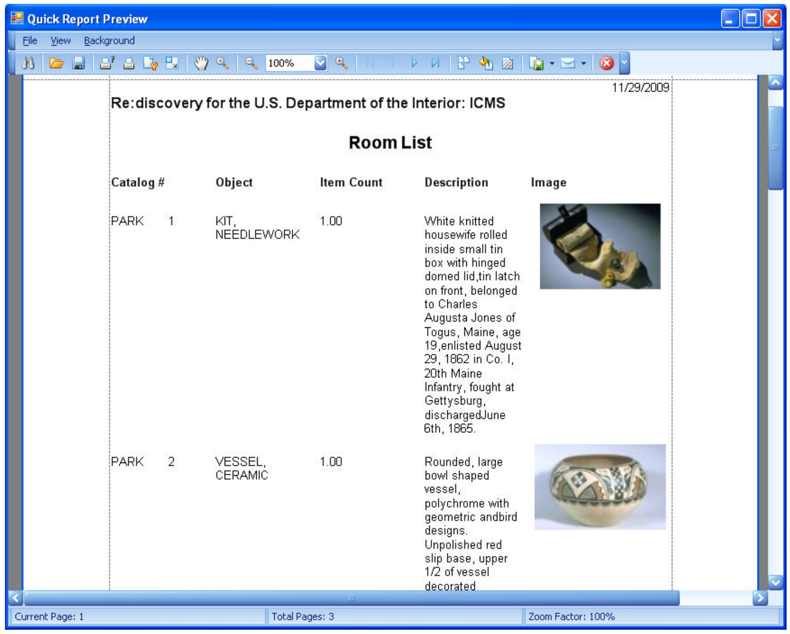
- In the Quick Reports Management window, select Report Templates along the left edge if it is not already selected and then click on the template you want to use. If not all report templates are visible, make sure to select Show All Report Files in the upper right corner of the Quick Report Management window.

- Select one of the Run options on the button bar or from the File menu:

  Run and Preview Sample : Shows the report with a sample of your visible data so that you can take a look at the preview quickly before running the complete report.

  Run and Preview **:** This option gives you the choice of running the report on all visible data or the current record only (the record that appears in the Record Pane). Choosing All Visible runs the report on all of your visible data and may take a few minutes to run depending on the size of your visible data.

Both options open the report in a Quick Report Preview window.



2. *What formatting options do I have before I print the report?*

There are also several formatting buttons on the button bar. On the Quick Report Preview window you can also:

- drag the dotted lines along the edge to adjust the paper margins, *or*
- use the Page Setup button  at the top to change the margins. **Note:** Changing the paper size and orientation from here does not affect the layout of the report. It was already formatted using the settings in your template.
- change the background color 
- add a watermark 

You can hover your mouse over the buttons to see what each does.

3. *How do I print the report?*

To print the report, from the Quick Report Preview window, choose one of the print buttons on the button bar:

- Print: Brings up your Windows printer software to allow you to choose which printer to send the report to.
- Print Direct: Sends the report directly to the default printer for your computer as defined by your operating system under Printers and Faxes.

Note: Printing does not save the Quick Report results. See the next section for information on saving the Quick Report for future access.

D. Saving a Quick Report

1. *What formats are available to save a Quick Report?*

A Quick Report can be saved in several different formats:

PDF

HTML
Text (txt)
CSV
MHT
Excel (xls)
Rich Text (RTF)
Graphic

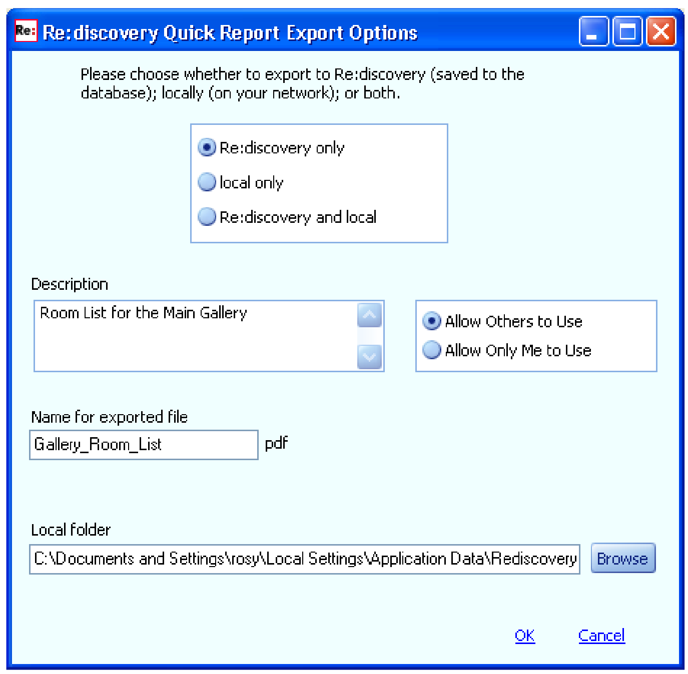
Note: If you include the institute's image or default images for records on the report, they will display in a PDF, HTML or graphic document only. These are the only file formats that can support images.

2. *How do I export and save the Quick Report?*

To save or export the Quick Report to another file format:

- First, run the Quick Report using a Quick Report template, as described in Section C above.

- On the Quick Report Preview window, click the down arrow next to the Export Document button  to choose a file format. A Quick Report Export Options window will open.



- Choose whether to save the file internally, externally or both.

  Re:discovery only: This saves the report internally. Reports saved internally will be accessible from the Quick Report Management window by selecting Results along the left edge.

  Local only: This allows you to save the report outside of Re:discovery as a file on your computer. Reports saved outside of Re:discovery will not be accessible from the Quick Report Management window.

  Re:discovery and Local: This saves the report internally and as a file outside of Re:discovery on your computer.

- Enter a description of the report (required).

- Choose whether to allow others to view and print the report or only you.

- Enter a name for the report file (required).

- If saving the file locally, enter a location in the Local folder box, or click Browse to select a location to save the file. By default, it will select a Rediscovery folder under your user name in the Documents and Settings folder on your C:\ drive.

- Click OK to save the report.

3. *How do I email the Quick Report?*

To send the report to someone as an attachment to an email:

- First, run the Quick Report using a Quick Report template, as described in Section C above.

- On the Quick Report Preview window, click the down arrow next to the Send email button  to choose a file format. The file formats are the same as exporting with the exception of the HTML format. Only PDF and Graphic document formats will display an image.

- Enter a name and location for the file.

- Your email software will open with the document already attached to a new email ready for you to address and send.

4. *How do I access Quick Reports that have been saved internally?*

To access Quick Reports that are saved in Rediscovery (internally):

- In the Quick Reports Management window, select Results on the left edge of the window.

- Select the report from the list of reports.

- Click Open on the button bar. The report will open in the format in which it was exported.

Note: If the file format has no application associated with it on your computer, you will get a message when you try to open the file: No application is associated with the specified file for this operation. This means that your computer does not have the program installed to view the file in that format. For example, PDF file extensions must have a PDF reader such as Adobe Acrobat. XLS file extensions require Microsoft Excel to open.

5. *How do I delete a saved report?*

To delete a report that was saved in Rediscovery (internally):

- In the Quick Reports Management window, select Report Results on the left edge of the window.

- Select the report from the list of reports.

- Click Delete on the button bar. The report will be deleted from the list.

IV. FULL VIEW

A. Overview

1. *What is the Full View option?*

Full View lets you view all the information about a catalog record, including supplemental data and attached images. It is also available for associated module records.

2. *When would I use Full View?*

Use Full View to:

- Display only fields with data.
- View several catalog records at one time to compare.
- Print one or more catalog records with all information including supplementals and images.
- Export the catalog information for one or more records to a file to send to a researcher.

3. *How do I access Full View?*

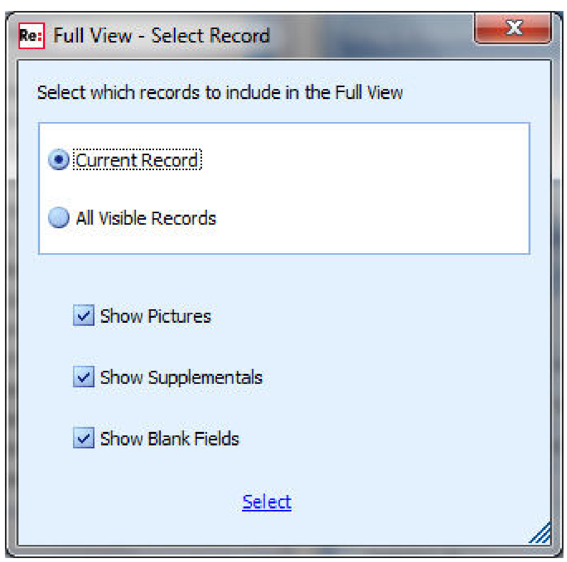
To open a Full View window:

- Select a single record or multiple records by activating a tag, filter or selecting multiple records in the List Pane.
- Click the Full View button on the Button bar, or
- Choose Full View from the Record menu on the Menu bar.

B. Full View Options

1. *What options are available in Full View?*

Once you have selected Full View from the Button bar or Record menu, you will see a Full View – Select Record window.



Here you can select which records to include in the Full View window and whether to include pictures, supplementals and/or blank fields.

After making your selections, click Select to open the Preview window.

2. *Can I include more than one record at a time?*

Yes. In the Full View – Select Record window, choose whether to include only the current record or all visible records before you click Select.

- **Current Record**: Will include only the one record you were viewing on the screen when you selected Full View.
- **All Visible Records**: Will include all visible records; all the records currently visible or limited by a Tag, Filter, or by selecting specific records in the List Pane.

3. *How do I include/exclude images from Full View?*

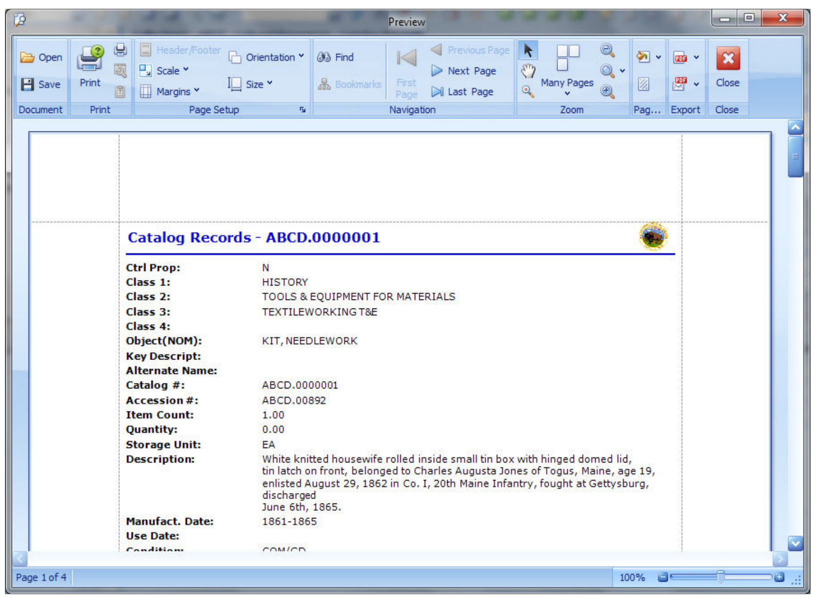
To include images in the Full View window if any are attached to a record, check Show Pictures on the Full View – Select Record window before you click Select.

4. *How do I include/exclude supplementals?*

To include supplemental records in the Full View window for a record, check Show Supplementals on the Full View – Select Record window before you click Select.

5. *Can I show fields that have not been entered?*

Yes. You can show blank fields in the Full View window. Check Show Blank Fields on the Full View – Select Record window before you click Select.



6. *What other options are available in the Full View window?*

Once you are in the Preview window for Full View, using the button bar, you can also:

- search the document for specific text
- modify the appearance of the document
- zoom and un-zoom the view of the document
- view subsequent pages of the document
- view multiple pages in the same window

Note: When you hover your mouse over a button on the Button bar, it will display its function.

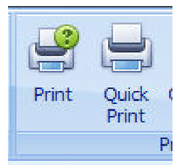
7. *Can I change the order of the fields in Full View?*

No. You cannot change the order in which the fields display in Full View.

C. Printing Full View

8. *How do I print a Full View record?*

To print the Full View record click one of the print buttons on the button bar:



- **Print:** Brings up your Windows printer software to allow you to choose which printer to send the report.

- **Quick Print:** Sends the report directly to the default printer for your computer as defined by your operating system.

9. *Can I change the margins of the page?*

Yes. You can change the page margins by selecting one of the options under Margins on the button bar or by clicking the dotted lines on the Full View page and moving them in or out as desired.

10. *What other print options are available?*

Using the button bar in the Preview window, you can also:

- change the paper orientation (landscape or portrait)

- change the paper size (letter, legal, etc.)

- change the background appearance 

- insert a watermark for the document 

D. Exporting Full View

1. *What formats are available to export a Full View record?*

There are several file formats available to export the Full View record(s):

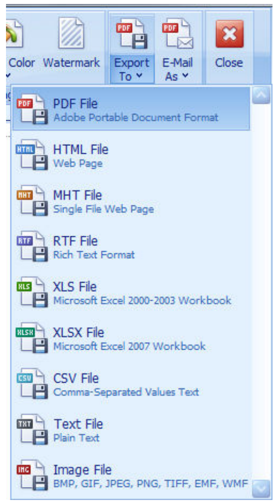
  - PDF File (Adobe portable document format)
  - HTML File (web page) – not available on email option
  - MHT File (single file web page)
  - RTF File (rich text format)
  - XLS File (Microsoft Excel 2000-2003 workbook)
  - XLSX File (Microsoft Excel 2007 workbook)
  - CSV File (comma-separated values text file)
  - Text File (plain text)
  - Image File (bmp, gif, jpeg, png, tiff, emf, wmf)

Note: Only PDF, HTML, RTF, XLS, XLSX and Image File formats will include the image(s) attached to a record.

2. *How do I export a Full View record?*

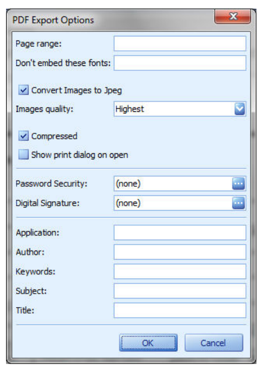
To export the Full View record(s):

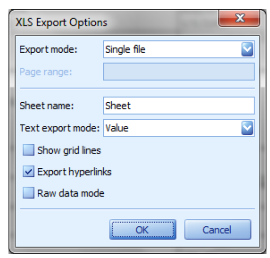
- On the Full View Preview window, click on the drop down list for the Export To button on the button bar.



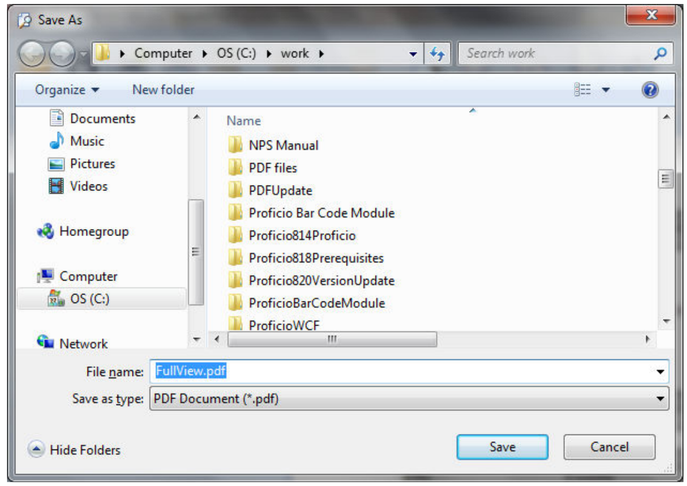
- Select a file format.

- After selecting the file type you want, an options window will open for that file type. For the most part, you can simply click OK to accept the default options for that file type. Here are examples of the options for the PDF and XLS file types.





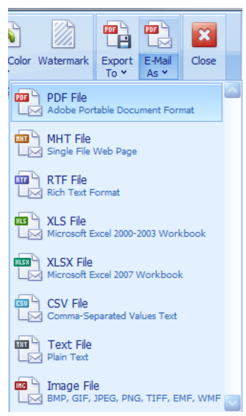
- A Save As dialog box will open to allow you to select a location on your workstation or network and name the file. (If you do not change the file name, the default name is “FullView” with the file extension of the type you selected.) Click Save.



3. *How do I email a Full View record?*

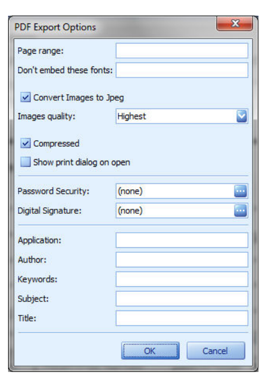
To send an email with the Full View record(s) attached:

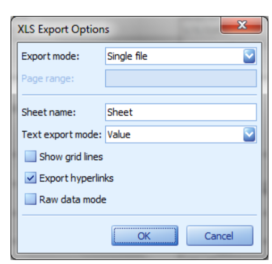
- On the Full View window, click on the drop down list for the Email As button on the button bar.



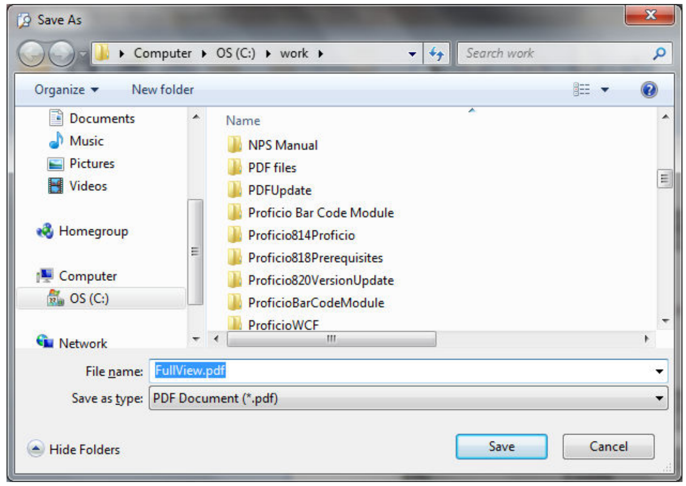
- Select a file format (**Note:** HTML document format is not available for sending an email.)

- After selecting the file type you want, an options window will open for that file type. For the most part, you can simply click OK to accept the default options for that file type. Here are examples of the options for the PDF and XLS file types.





- A Save As dialog box will open to allow you to select a location on your workstation or network and name the file. (If you do not change the file name, the default name is “FullView” with the file extension of the type you selected.) Click Save.



After the file is saved, your email software will open with the Full View document already attached, ready for you to address and send.

V. PROFICIO REPORTS DESIGNER

A. Overview

4. *What is the Proficio Reports Designer?*

The Proficio Reports Designer is a new flexible and feature rich report writing tool in ICMS. With this tool, you can:

- create new Proficio Reports in ICMS,
- modify existing reports (if they are not standard ICMS reports),
- copy existing reports to create new reports.

5. *What is the difference between the old Re:discovery report writer and the new Proficio Reports Designer?*

The old Re:discovery report writer was based on different technology which is being phased out. The new Proficio Reports Designer has more design tools that work with the current programming and features of ICMS.

6. *Can I edit my old Re:discovery Reports in the new report designer?*

No. Since the old Re:discovery Reports were created in a different program, they cannot be edited in the new Proficio Reports Designer. However, you can recreate your Re:discovery Reports using the new report designer.

7. *Will my Re:discovery Reports still work in ICMS?*

Yes. Users can still run their custom Re:discovery Reports but cannot edit them or create new ones using the old report writer. These reports will be listed in the Proficio Reports list with "(legacy)" after the name. Run them the same way as you always have.

Note: All standard ICMS reports have already been converted to the new Proficio Reports.

8. *How do I access the new Proficio Reports Designer?*

To get to the Proficio Reports Designer:

- Click the Proficio Reports button on the toolbar, *or* in the Menu Bar, select Record → Reports → Proficio Reports → Proficio Reports
- Then, from the File menu in the Proficio Reports window, select one of the report options:

  New Report to create a new report

  Modify Report to change the selected Proficio Report
  (Note: Standard ICMS reports are locked for editing)

  Copy Report to copy the selected report so you can create a new report based on the selected report.

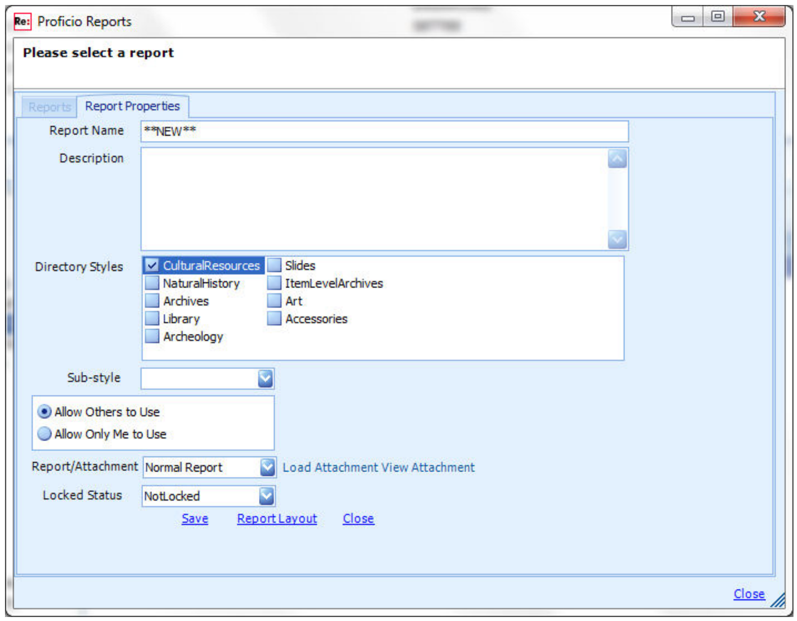
The following instructions are a quick start guide on how to use the Proficio Reports Designer to create or modify a basic report. If you need guidelines on using some of the more complex features of the report designer, please contact Re:discovery Software Inc. for a complete guide to using the Proficio Reports Designer.

B. Creating a Proficio Report

1. *How do I create a new report in the Proficio Reports Designer?*

To create a new report you must be in the module with the main data that you want to include on the report. For example, if you want to create a report with catalog record fields on it, you must start on the Catalog Records screen.

Then, open the Proficio Reports window and select New Report from the File menu. The Report Properties window will open.



- Enter a Report Name in place of **NEW**
- Enter a Description of the report (optional)
- Directory Styles will default to the type of directory you are working in. The report will be available in all directories of the same type in your system. E.g., a report created in cultural resources will be available in all cultural resources directories.
- Leave the Sub-style blank
- Select whether to allow other users to use this new report or only you (based on your login ID).
- Do not change Report/Attachment or Locked Status.
- Click the Report Layout link. The Report Designer screen opens.

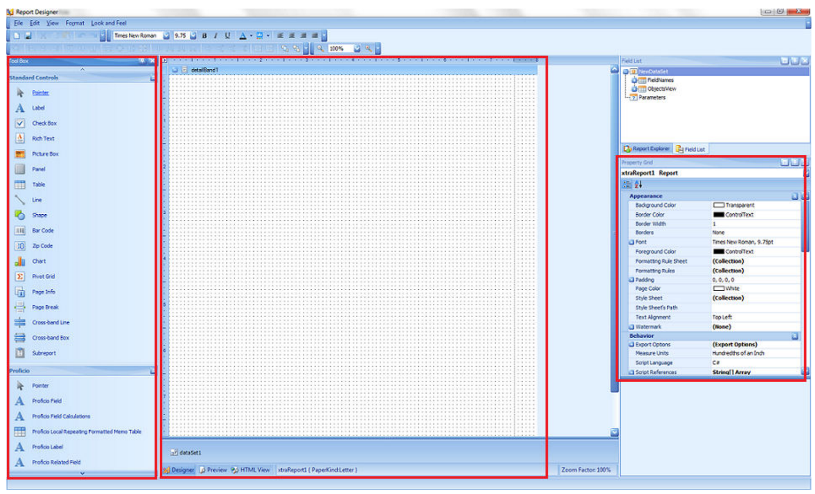
2. *How do I add a field to the report in the report designer?*

The Report Designer has 3 sections:

- **Tool Box:** The pane on the left is where you select various controls to put on the report. Standard controls are listed in the top section and Proficio specific controls in the lower section.

- **Designer Area/Report Layout:** The pane in the middle is where you add and adjust the placement and size of the controls (e.g., data fields and labels) on the report layout.

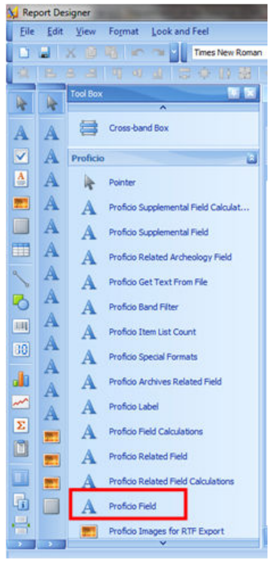
- **Property Grid:** The pane on the lower right is where you change the properties for the control such as font size and color, text alignment, word wrapping, location/size, and Proficio specific settings such as which field(s) to print. The available properties will vary depending on the type of control selected. When you click on one of the property settings, the box at the very bottom of the pane will often provide information about the selected setting. (Please do not use the Field List box at the top right.)



All elements in the design of a report are called "controls" whether they are labels, fields, lines, etc. We will use the term "control" through this document to refer to any of these report elements. The first couple of steps are the same no matter what kind of control you are adding to a report.

To add a field (control) to the report:

- In the Tool Box on the left, scroll down to the lower Proficio and click Proficio Field.



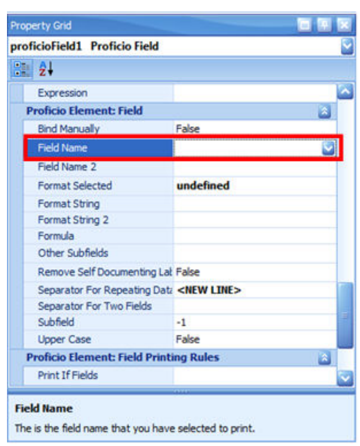
- Then in the report layout section in the middle, click on any area at the top of the page, below the Detail Band. The field will appear.

- To resize or move the control, click on it to select it. It will have a thicker border with small boxes called sizing handles along the edge.

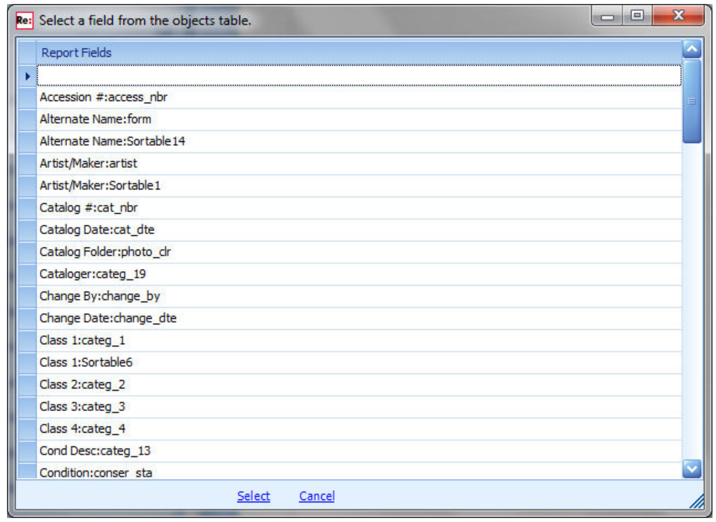
  - To resize the control, hover your mouse over one of the sizing handles until your cursor turns into a double headed arrow. Click and Drag to resize the control.

  - To move the control, hover your mouse over the control (anywhere except on one of the sizing handles) until your cursor becomes a plus sign with 4 arrows. Click and Drag the control to move it to a different position on the report.

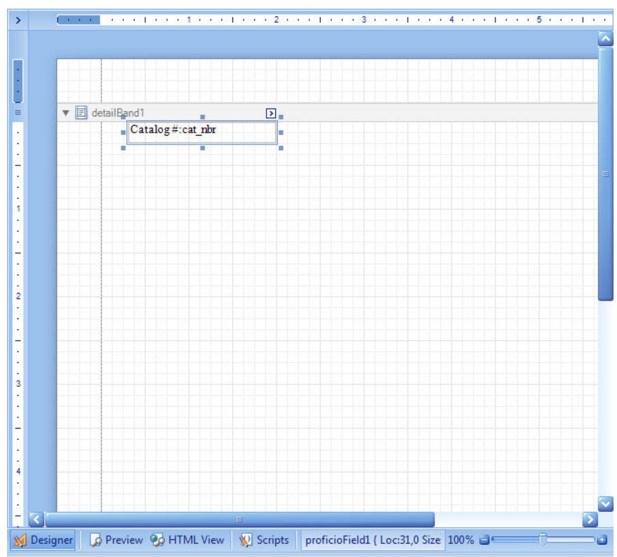
- In the Property Grid on the lower right, scroll down and find the row for Field Name under the Proficio Element: Field section.



- Click the pull down next to Field Name to open the list of fields.



- Select a field, such as Catalog #. The Catalog # field is now in the report layout.



To quickly add another field to the report:

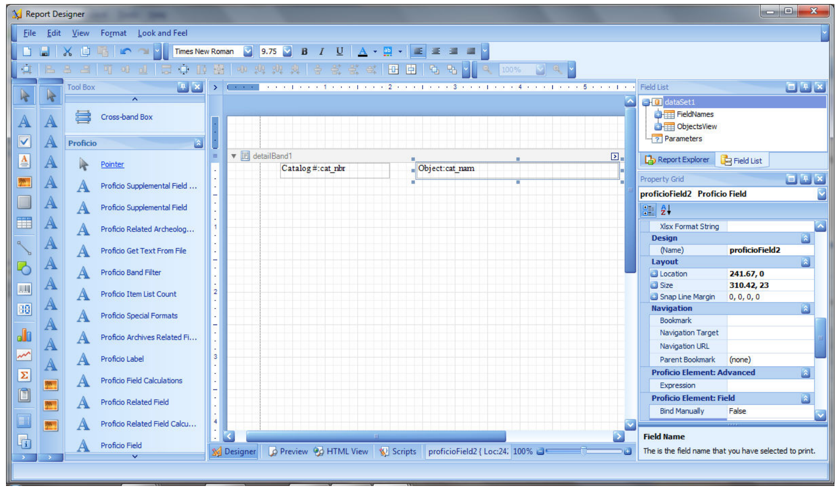
- Right-click the Catalog # box in the detail band that you just created, and choose Copy.

- Then right-click in a blank area of the layout and choose Paste.

- Click-and-drag the new box to the top and right of Catalog #.

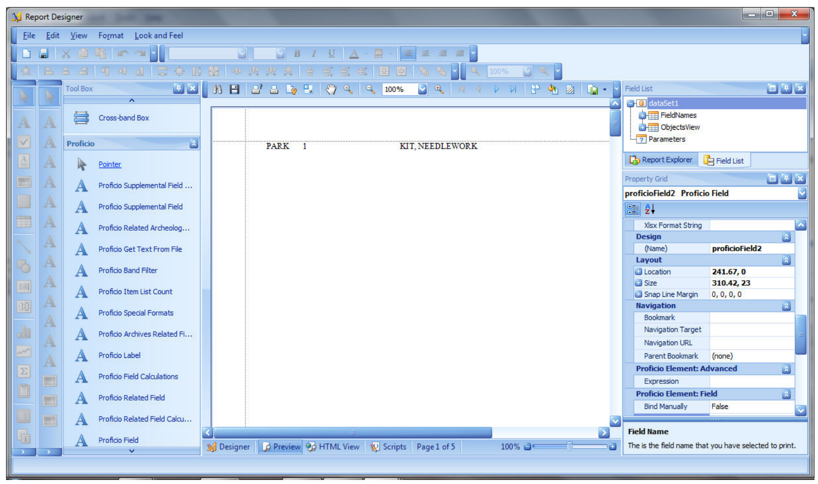
- In the Property Grid on the right, scroll down and find the row for Field Name again. Click the pull down next to Field Name to open the list of fields.

- Select another field, such as Object. The Object name field is now in the report layout. (Resize the field as desired by using the sizing handles.)



3. *How can I preview the report while in the report designer?*

To preview what the report will look like, at the bottom of the report layout, click the Preview tab.



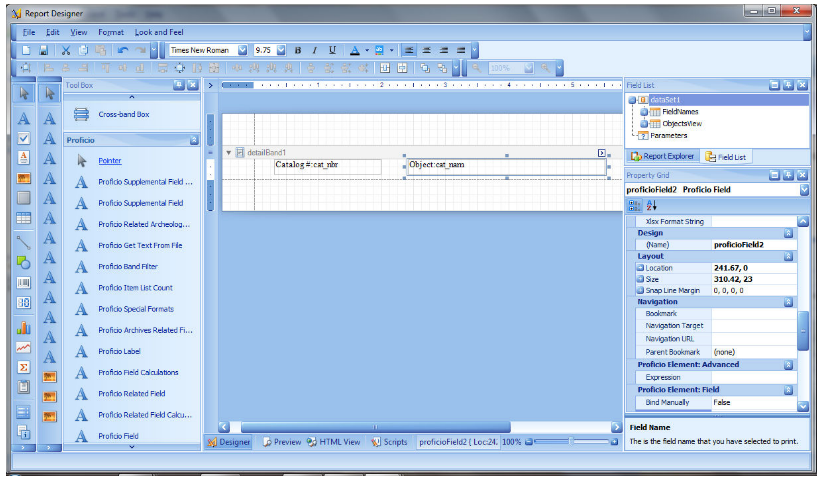
Note: The Preview tab only shows a sample of records from your data without regard to active filters or tag sets. This is usually the first 10 records from the beginning of your data

If the detail band includes enough space for an entire page, you just created a one page form, which will print one record per page when you "Run for All Visible Records."

4. *How do I change the spacing between rows so that more than one record prints per page?*

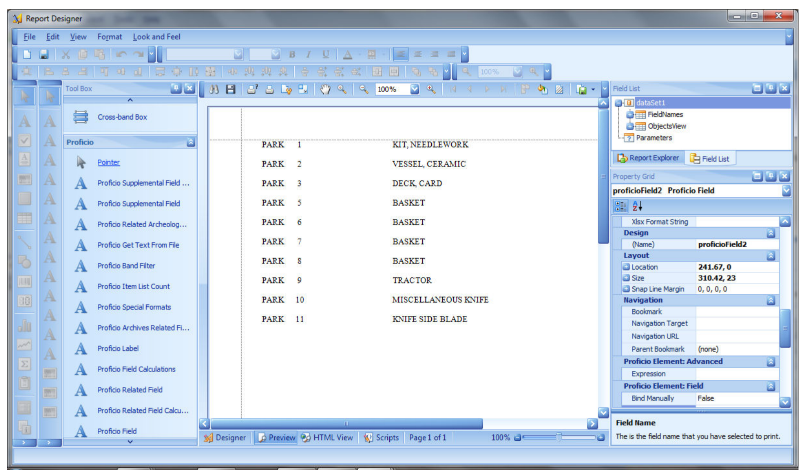
To make the detail band shorter so that each record is on a single row rather than a whole page, return to the layout page by click the Designer tab at the bottom of the middle section.

- Scroll down in the middle section to the bottom of the page.
- hover over the bottom edge/margin of the detail band until your mouse turns into a double arrow, then click and drag the edge up to just under your data fields.



Note: The amount of space you leave between the data fields and the detail band margin will be the spacing between the rows when you print the report.

- At the bottom of the report layout, click the Preview tab.

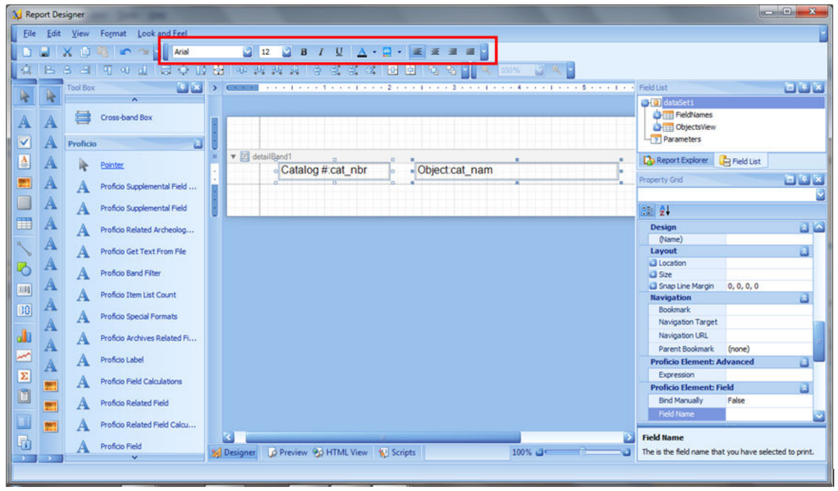


5. *How do I change the style of the text in my report?*

To change the style of your text such as font, size, bold, italic, etc.,

- From the Designer tab in the middle, select one or more controls in the layout grid. (**Note:** To select more than one control in the layout, hold down the shift key and click each control so that they are "highlighted".)

- Then you can use the formatting bar at the top of the window to select font, size, style, text alignment and even color. These are the same kind of formatting tools that you use in Microsoft Word, Excel and other word processing software.



6. *How do I save my report?*

To save your report:

- Select Save from the File menu or click the Save button on the button bar.

- Click the red X in the upper right to close the report layout window and return to the Report Properties tab. (Note: if you did not save the report before closing the layout window, the system will ask if you want to save your changes. Click Yes.)

- Then click the Close link next to the Report Layout link to return to the list of Proficio Reports. (Hint: if you click the Close link at the very bottom of the window, it will close the entire report interface.)

You just created a list report, which will print one row for each record when you select [Run for All Visible Records].

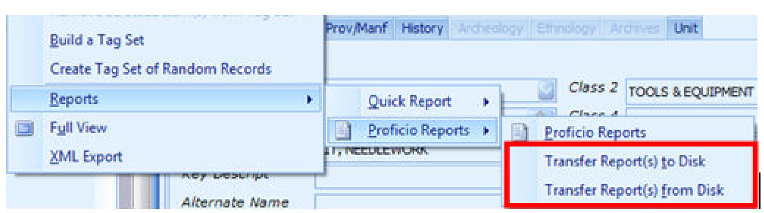
7. *Can I transfer my reports to another ICMS system?*

Yes. You can transfer reports you created to another separate installation of **ICMS**. You may wish to send these reports to a cataloging contractor or share with staff at other units.

8. *How do I transfer my reports to another ICMS installation?*

To transfer Proficio Reports to another **ICMS** installation:

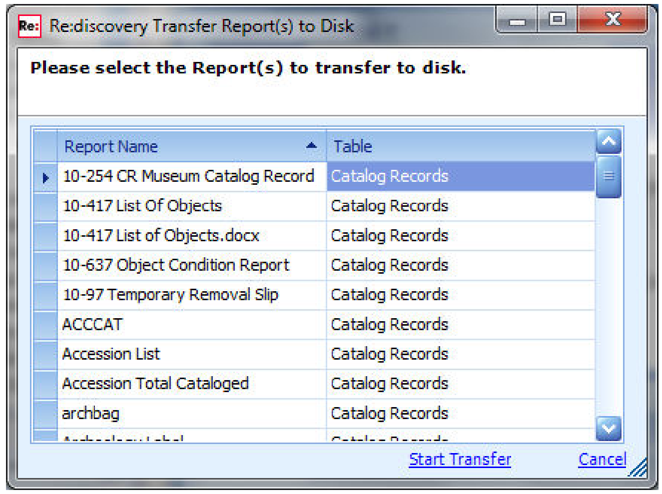
- Go to the Record menu and select Reports → Proficio Reports → Transfer Report(s) to Disk.



- A list of the Proficio Reports for that directory type will display.

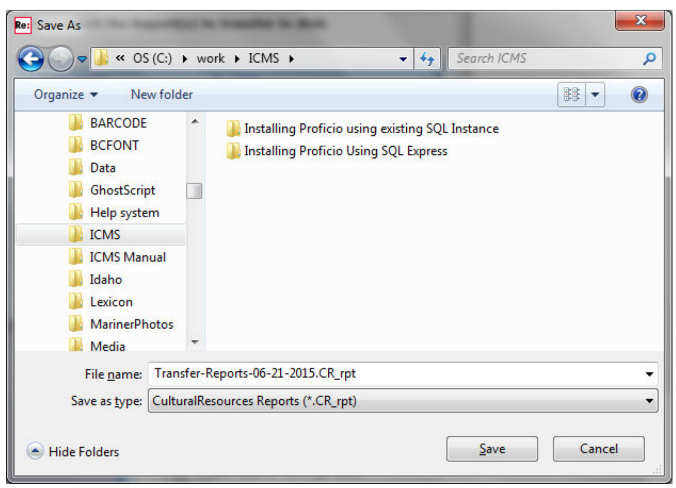
  (**Note:** If you are in an individual table like catalog records or accessions, only the reports for that table will be listed. However, if you select the directory in the Navigation Pane and then go to Record →

Reports → Proficio Reports → Transfer Report(s) to disk, you will see reports for all tables in that directory.



- Select the report(s) you wish to transfer . You may select multiple reports by holding down the CTRL key and clicking on additional ones until you have highlighted all desired reports. (**Note:** You do not need to transfer any of the ICMS standard reports. All installations of ICMS will have these standard reports in their system.)

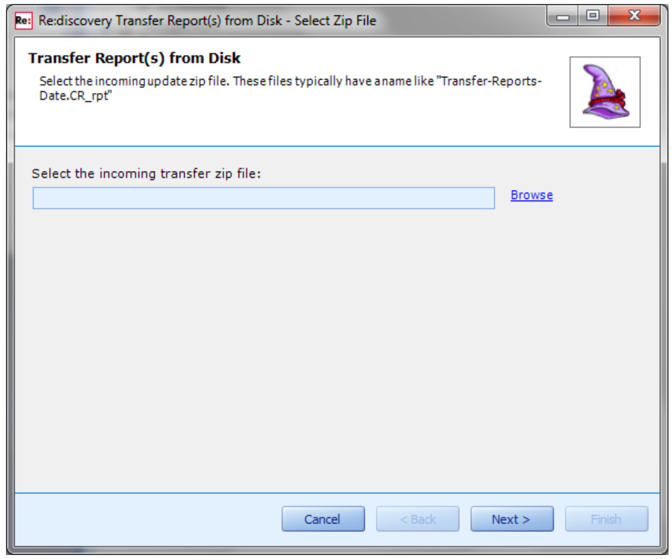
- Click Start Transfer



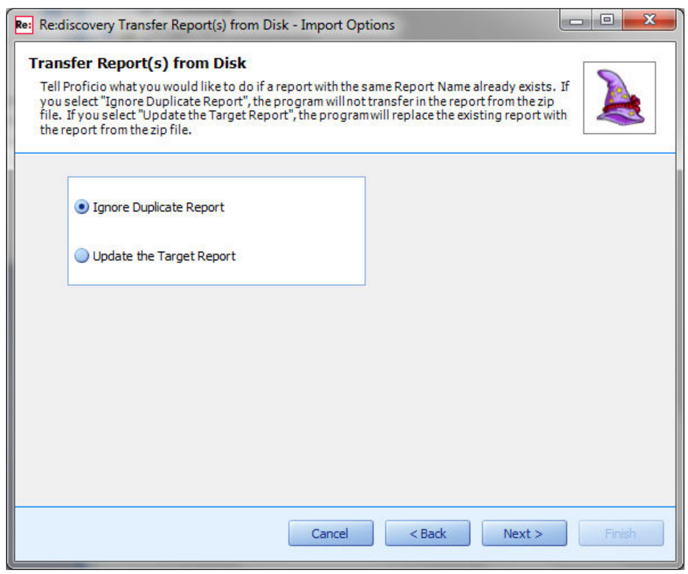
- Change the location as desired. You may keep the default File name or change it, but you MUST leave the default Save as type and extension. Then click Save.

- When the transfer is complete, click OK. You can send the file to another user to load into their **ICMS** system.

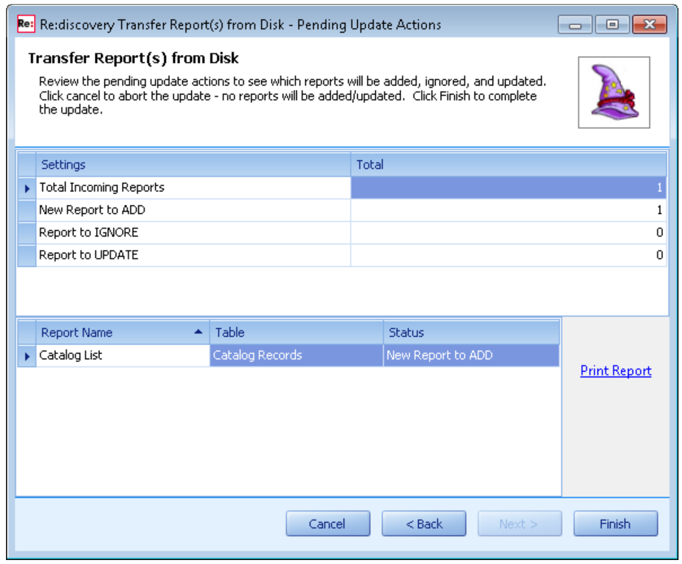
- To load the report(s), in the **ICMS** system that you want to transfer the Proficio Report(s) into, from the Record menu, select Reports then Proficio Reports and then Transfer Report(s) from Disk.



- Use the Browse link to navigate to the transfer file you created above, select it and click Open. Then click Next.



- Select an option for duplicate Reports (i.e., ones that may already exist in this **ICMS** system with the same name as those you are transferring in). Then click Next.



- The program will display a summary of the Reports being brought in, including their names and whether they will be newly added or updated. Click Finish.

- When the transfer is complete, click OK. The report is now available for use in that system.

C. Commonly Used Features of the Proficio Reports Designer

1. *What are the commonly used controls in the Tool Box?*

Among the “Standard Controls” at the top of the Tool Box, the most frequently used are:

- **Label**: put text on the report, such as for a title or the name of a field.
- **Line**: create a horizontal or vertical line on the report.
- **Page Info**: put page numbers or current date and time on the report.
- **Page Break**: set a Page Break at the bottom of the layout to make the report start a new page for each record.

The Proficio controls are at the bottom of the Tool Box. Click the down arrow at the bottom to see more of them. The Proficio controls are what you will use to put data and images in the report. The most frequently used Proficio controls are:

- **Proficio Field**: a data field, such as Catalog # or Object Name, Location, etc.
- **Proficio Label**: the name a field as it appears on the data entry screen.
- **Proficio Images**: the image or images attached to a record.
- **Proficio Related Field**: data from a related table, such as the acquisition date from the accession record that you want to appear on a catalog report.
- **Proficio Supplemental Field**: a field from a supplemental record, such as appraisal value.

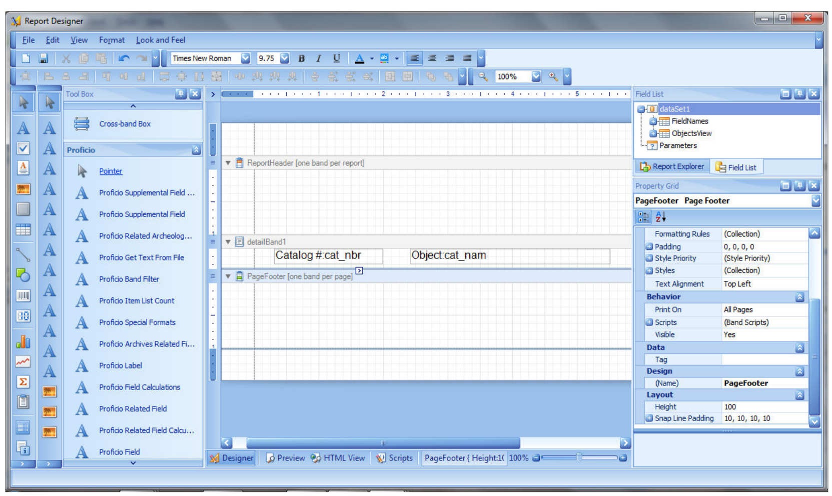
- **Proficio Field Calculations**: a field in a Summary band to sum the total of a numeric field, such as item count.
- **Proficio Supplemental Field Calculations**: a field in a Summary band to sum the total of a numeric supplemental field, such as the Appraisal value supplemental.

2. *What are the commonly used options in the Designer/Layout area?*

A new report will include only a “Detail Band” shown at the top of the screen. Everything below the Detail Band will repeat for each record. For a report that includes data for one record per page, the Detail Band will take up most of the layout. For a report that includes a list of records, the Detail Band may be narrow.

To add other bands to the report, right click in a blank area of the Designer section and choose Insert Band. The most commonly used bands are:

- **Report Header**: for a title that will print only on the first page of the report.
- **Page Header**: for a title or column headers that will print on the top of every page of the report.
- **Group Header**: for a sub-title or column headers when the report groups data by a category, such as by classification, location, accession number, etc.
- **Detail**: prints data for each record.
- **Group Footer**: for a summary band totaling a numeric field for a group of records.
- **Page Footer**: for a summary band totaling at the bottom of each page, or for page numbers and the date of the report.
- **Report Footer**: for a summary band totaling at the end of the report or text you want to appear at the end of a report.



To resize a band up or down, click-and-drag the left end of the band (slider button) on the vertical ruler. (Hint: The mouse will turn into a hand or a double-headed arrow when you hover over the slider button for the band.)

You can also Center a control horizontally or vertically in the Report Layout. Select the control, and from the Format menu at the top of the screen, choose Center in Form, then Horizontally or Vertically.

At the bottom of the layout are tabs for Designer and Preview. After putting controls such as title and fields on the layout, click the Preview tab to see how the report will look when printed. The Preview only shows a sample of 10 records without regard to active filters or tag sets, and may not accurately reflect current data for supplemental records and images. Click back to the Designer tab to return to the Report Layout.

3. *What are the commonly used properties in the Property Grid?*

After selecting a control from the Tool Box and placing it in the Report Layout, use the Property Grid on the right to set the specific properties for the item. For example:

- For a Label (from Standard Controls), scroll to the bottom of the Property Grid and find the row for Text. Remove the default "label1" text, and enter your own text, such as a title or field name. Press Enter, and the text you typed will appear in the control in the Report Layout.

- For a Proficio Field, scroll down the Property Grid and find the row for Field Name under the Proficio Element: Field section. Click the pull-down next to Field Name, and a list of available fields will open. The list includes all the fields from the screen you're working from (Catalog Records, Accessions, etc.) in alphabetical order. Click the field you want, such as Accession #, Catalog #, Object Name, Location, etc. Then click the Select link. The Field Name section in the Property Grid will fill in with that field name, as will the control in the Report Layout.

For text controls (Labels, Proficio Fields, etc.), the most commonly used Properties are:

(**Note:** many of these layout controls are also available in the button bar across the top of the design window)

- **Font**: set the desired font (Arial, Courier, Times New Roman, etc.) and size of the text.
- **Text Alignment**: set the text to appear Top Left, Top Center, etc. within the control.
- **Can Grow**: Allow the control to stretch to the extent of data, or maintain a fixed size.
- **Word Wrap**: Allow the text to wrap to additional lines if needed.
- **Location**: Refine the position of the control, relative to the Left margin and Top of the band. (100 = 1 inch, 200 = 2 inches, etc.)
- **Size**: Refine the size of the control, Width by Height. (100 = 1 inch, 50 = 1/2 inch, etc.)

4. *What Properties am I required to set for the controls on my report?*

For the most commonly used controls from the Tool Box, these are the required Properties.

Required Properties for Standard Controls:

- **Label**:
    - <u>Text</u>: Enter text for a title, the name of a field, or a section of text such as terms and conditions for a deed of gift.

- **Line**:
    - Line Direction: Horizontal, Vertical, etc.
    - Line Style: Solid, Dashed, etc.
    - Line Width: enter a numeric value, 1 being the thinnest line.
    - Anchor Vertically: fix the line to the top or bottom of the band.
- **Page Info**:
    - Page Information: select the style of page numbering or the current date and time that the report is run.
    - This control is generally placed in the Page Header or Footer band so that it appears on each page.
- **Page Break**:
    - No required properties, just place it at the bottom of the Detail band, usually, where you want a new page to start.

Required Properties for Proficio controls:

- **Proficio Field**:
    - Field Name: select a data field, such as Catalog # or Object Name, Location, etc. This prints the data from the field.
- **Proficio Label**:
    - Field Name: select a data field, such as Catalog # or Object Name, Location, etc. This prints the field label, the name of the field as it appears on the data entry screen.
- **Proficio Images**:
    - Sizing: Zoom image (default), Autosize, Stretch, or Center the image within the report control.
    - Format Selected: Choose to display the Thumbnail or Full Image.
    - Number of Images to Show: If more than one image is attached to record, enter the number of images you want to include in the report. -1 = all images.
    - Number of Columns to Display: If printing multiple images per record, how many columns of images should display for each record.
- **Proficio Related Field**:
    - Related Table: Opens the Setup Relationship window. Select the Related Table (such as Access to include Accession data in a Catalog report). Then set the Relationship: Relator Field Name (such as Accession # from the Catalog record), and Target Field Name (such as Accession # in the Accession record).
    - Field Name: select the field from the related table, such as Acquisition Date or Donor.
- **Proficio Supplemental Field**:
    - Supplemental Type Name: Select the supplemental type, such as APPRAISALS.
    - Supplemental Field: Select the specific supplemental fields. Cat_fld1 is the first text field, Dte_fld1 is the first date field, num_fld1 is the first numeric field, mult_desc is the memo or notes field. For example, for APPRAISALS num_fld1 will be the appraisal value, dte_fld1 will be the appraisal date. For LOANS OUT, dte_fld1 will be the Start Date, Dte_fld2 will be the End Date.

- How Many Supplementals Entries: Enter the number of supplemental records to include in the report. For example, 1 = the first (most) recent supplemental for APPRAISALS, LOANS OUT, etc. -1 = all supplementals (the entire value, loan, location history, for example).

- **Proficio Field Calculations**:
  - Operation: Total, Average, Count, etc.
  - Field Name: Select a numeric field, such as Item Count.
- **Proficio Supplemental Field Calculations**:
  - Operation: Total, Average, Count, etc.
  - Same as above for Proficio Supplemental Field.

5. *Can I change properties for more than one control at a time?*

Yes. You can update the properties for multiple items at the same time, such as the font, by selecting multiple controls in the Report Layout: click-and-drag across several controls, or press and hold Shift or Ctrl while clicking each one. With multiple controls selected, when you edit a property in the Property Grid, the change will apply to all the selected controls. Note that the properties you change must be common to each control selected – e.g., you would not change the field name to be the same for each control.

6. *What other properties are commonly used for Proficio controls?*

Other commonly used properties for the Proficio controls are:

- Subfield: When the selected field is a Formatted Memo (such as Place Made which includes subfields for City, County, State, Country), enter a numeric value to select a specific subfield. -1 = all subfields. The individual subfields are numbered 0, 1, 2, etc. meaning the first subfield (City in this example), is subfield number 0.
- Remove Self Documenting Labels: For Formatted memo fields, set this to True to hide the bracketed subfield labels from appearing on the report.
- Format String: When selected, note the Format String field help at the bottom of the Property Grid. It gives examples. For example use the Format String {0:c0} to display numeric values as currency, using the $ symbol. Use the Format String {0:d} to display date fields without the timestamp, in the 01/31/2015 format.

7. *Where can I get further information about using the Proficio Reports Designer?*

Contact the tech support team at Re:discovery Software for a more in-depth white paper on using the features in the Proficio Reports Designer to create or modify reports.