Chapter 16

Customizing the Archivists' Toolkit

Overview

The Archivists' Toolkit provides a number of customization features that allow you to maximize productivity by tailoring the application to your needs. You can:

- establish default values for fields

- configure the interface by customizing field labels, identifying which fields should appear in list screens, modifying searching settings, and editing rollover tips that appear for each field

- create and edit lookup lists that provide multiple controlled values for a field

- customize default titles for notes

These options can increase data entry efficiency and allow for an interface that is more closely aligned with your repository context.

> Note: Customizing the Toolkit is an advanced operation, requiring some investigation into the underlying table structure of the Toolkit's database. Before beginning the customization process, it is advisable to review the terminology provided in the following section and to study the Reference List of Screens, Tables, and Fields found in the appendices.

Terminology

The following terms represent concepts related to the AT database or interface. Familiarity with these terms is essential to navigating and using the customization features.

Field: A basic unit, or element, of data entry in the Toolkit.

Field name: The identifier for a field in the Toolkit's database. The field name does not appear in data entry or other interface screens and cannot be modified.

Field label: The term displayed in the interface to identify a specific field. Field labels appear in data entry screens and list screens. Field labels may be modified.

List screen: A screen that lists a group of records in the Toolkit. These include the lists used to retrieve and access name, subject, accession, and resource records when you press **List All** from the main screen. List screens are also used to display linked records. For example, in an accession record, the source, creator, and name subject records linked to the accession record are displayed on the **Names & Subjects** tab in a list screen.

Lookup list: A list of terms that provides a set of predefined values for a certain field. The lookup list can be accessed during the data entry process, and a value selected from the list.

Table: A set of data elements that is organized into horizontal rows and vertical columns. A row represents a record in the table and a cell is a specific instance of a field within that record.

Relational databases, such as that used in the Toolkit, are comprised of multiple tables that are linked together. Therefore, the fields appearing on a single data entry screen may actually be stored in different tables. In order to access a field for customization purposes, you must first identify the table that contains the field.

> Note: In order to access the specific field you would like to customize, you must know which table contains the field. The Reference List of Screens, Tables, and Fields appendix shows the AT interface screens, along with a list of tables, field names, field labels, and list screens contained in each. In the appendices, you will also find a table listing the predefined AT lookup lists, the field to which they are linked, and the type of lookup list.

Default values

Default values

Overview

If your repository uses boilerplate text for field, you may wish to create a default value so that the same data does not need to be entered repeatedly. A default value is data that will automatically be entered into a field whenever you or another staff member in your repository creates a new record that contains that field. For example, if you enter `Materials closed until processed` as a default value for the **Access Restrictions** field that phrase will be entered into the **Access Restrictions** field whenever a new accession record is created for your repository. The default value can then be edited when necessary.

Establishing default values

Because default values are repository-specific, they are part of the repository record.

Establishing the default value for a certain field or note will result in that default text being input into the field or note each time you create a new record. You may then edit the default value if you wish. This allows you to easily input boilerplate text once so that it automatically populates the appropriate field or note. For example, you may wish to establish "Access restricted until materials are processed." as the default value for the **Access restrictions** field in the accession record.

Note: Not all fields will be available for establishing a default value. For example, information such as the user and date of record creation or update is automatically captured by the Toolkit. For a complete list of fields for which a default value can be established, as well as a list of the Toolkit's table names and fields, see the appendices.

Creating a default value for a field

1. From the **Admin Menu**, select the option to **Edit Repositories**.

2. Open your repository's record by double-clicking on your repository name in the list.

3. Click on the **Default Values** tab.

4. Press **Add Default Value**.

5. Select the appropriate **Table**, then the **Field** for which you will be establishing a default value.

Note: The Reference List of Screens, Tables, and Fields, found in the appendices, may assist you in locating the desired field.

6. Enter the default text in the **Value** field.

7. Press **OK** to save the record.

Creating a default title and default value for a note

1. From the **Admin Menu**, select the option to **Edit Repositories**.

2. Open your repository's record by double-clicking on your repository name in the list.

3. Click on the **Default Values** tab.

4. Double click on the note you wish to customize.

5. Enter a **Label** and/or **Note Text** for the note.

6. Press **OK** to save the record.

Editing and removing default values

1. From the **Admin Menu**, select the option to **Edit Repositories**.

2. Open your repository's record by double-clicking on your repository name in the list.

3. Click on the **Default Values** tab.

4. Edit or remove the default value:

   a. To edit a default, double click the appropriate entry in the list to open the record in question and edit the value.

   b. To remove a default, select the appropriate entry in the list and press **Remove Default Value**.

5. Press **OK** to save the record.

Configuring the application interface

Configuring the application interface

Overview

Configuring the application interface will allow you to:
- change the field labels that display on data entry screens
- modify the fields that appear in list screens
- customize which fields are available in the search interface
- tailor rollover tips, including field definitions and examples

> Note: The Reference List of Screens, Tables, and Fields, in the appendices, will assist you in locating the field you wish to customize.

Modifying field labels

You may wish to modify field labels that appear in the Toolkit interface, for example, to reflect terminology used in your repository or to match existing processing and procedure documentation.

> Note: Changing the label of a field is a superficial change that only affects the interface. You cannot turn a Container summary field into a Preservation actions field, for example. The underlying field name, data type, and any associated import and output mappings will not change.

1. From the **Admin Menu**, select **Configure Application**.

2. Double click on the table that contains the fields you wish to customize.

3. Double click on the appropriate field in the list.

4. In the **Database Field** window, modify the **Field Label**.

5. Press **OK** to save the field record.

6. Repeat for additional fields in the same table until all desired modifications are made.

7. Press **OK** to save all changes to the table.

Customizing the list screens

List screens are used for browsing name, subject, accession, and resource records, and for displaying linked records such as a list of names associated with an accession record. You may add a field to a list screen, change the left to right order of fields (columns) in a list screen, or remove a field from a list screen.

Note: Customizing list screens is accomplished by customizing specific field records. In order to modify the list screen, you must first identify the table that is the source of fields in the list screen.

1. From the **Admin Menu**, select **Configure Application**.
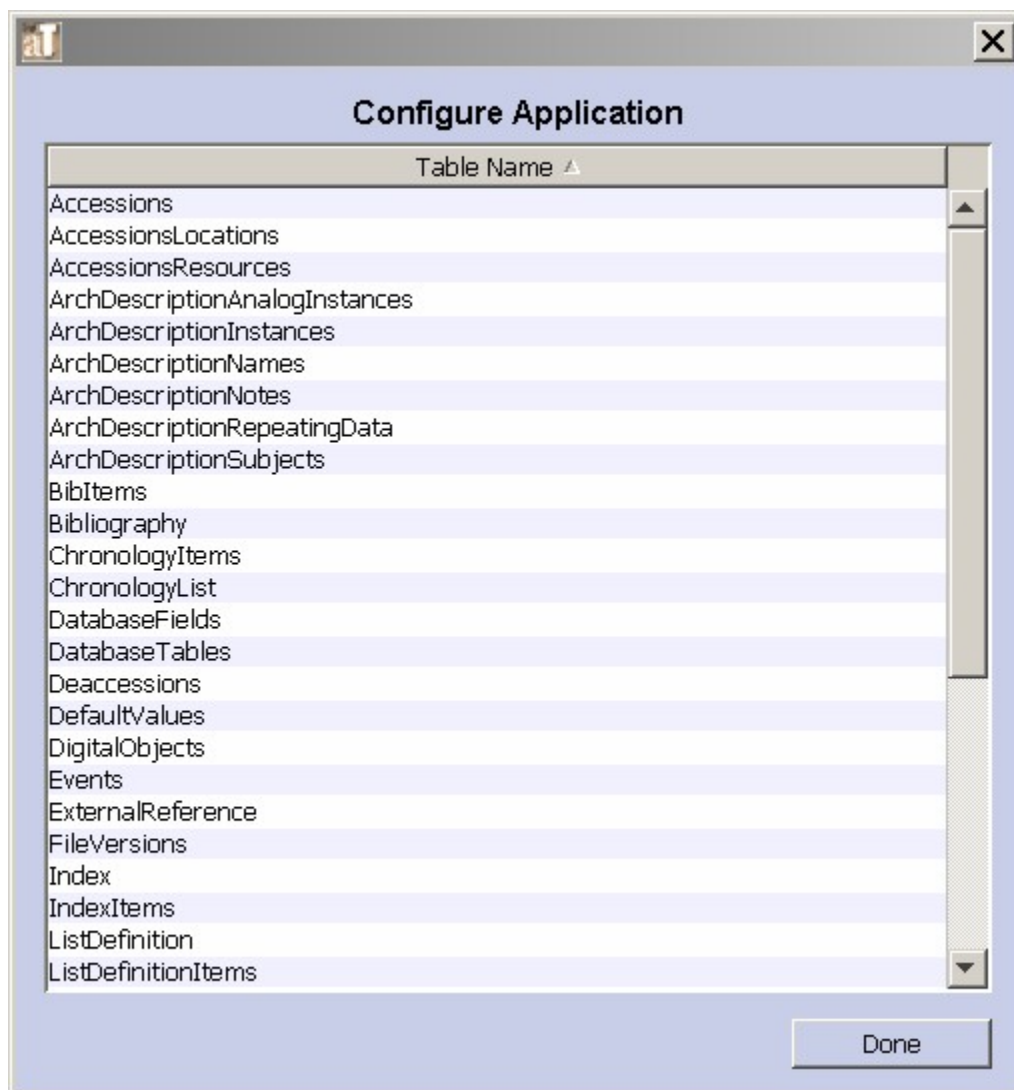
2. Double click on the table that contains the fields you wish to add to or remove from the list screen.

3. Double click on the appropriate field in the list.

4. In the **Database Field** window, enter a value in the **Return Screen** field. A 0 will remove the field from the list screen, a number will add the field to the list screen in the order that you designate.

> Caution: Removing a value from the **Return Screen Order** field, and leaving it blank, will cause an error that will require you to restart the application. If you wish to remove the field from the list, enter a 0.

> Note: The Toolkit does not prevent you from creating duplicate entries in this field. If you enter 3 and another field in the table also has the value 3, the Toolkit will reorder the rest of the fields. When the record is saved, the fields with a return screen order other than 0 will be sorted and then renumbered starting at 1.
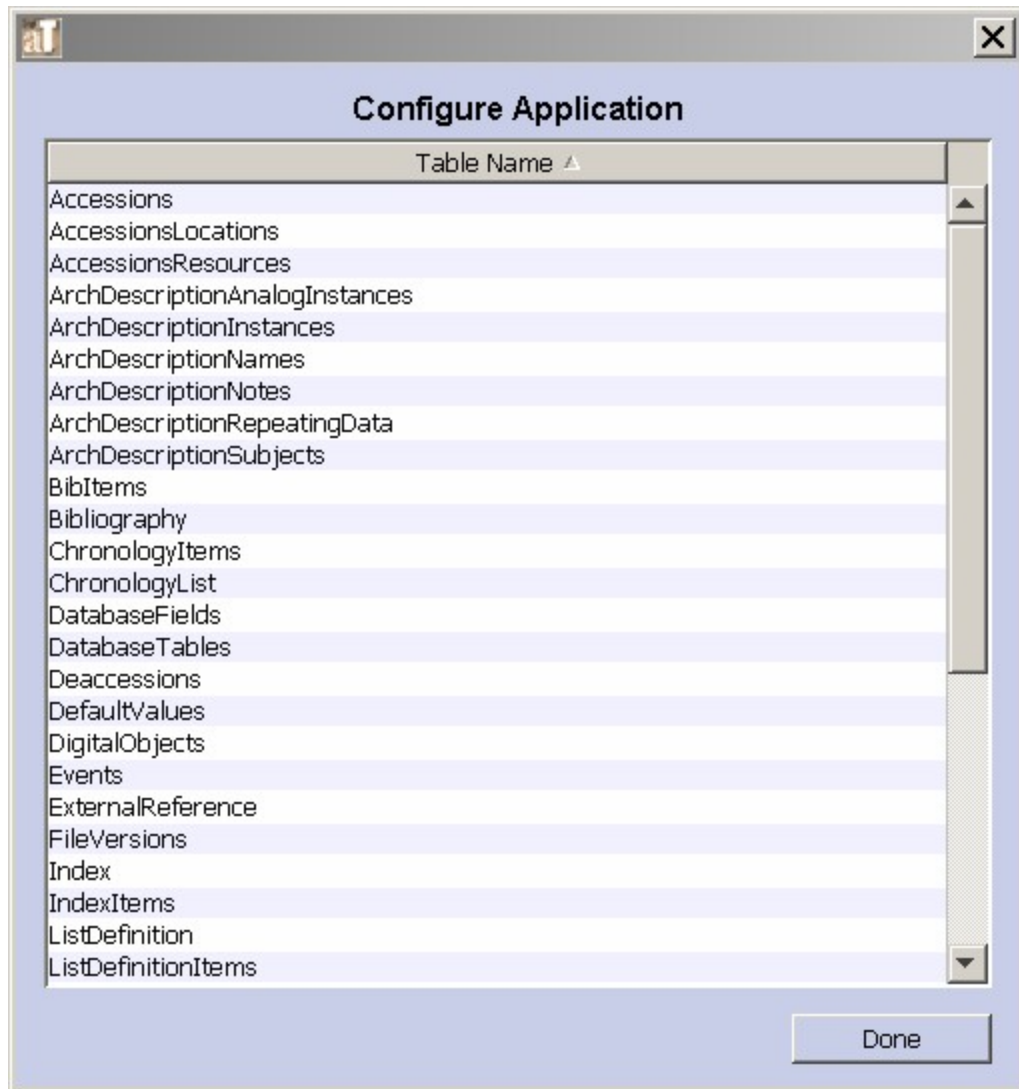
5. Press **OK** to save the field record.

6. Repeat until desired modifications are made.

7. Press **OK** to save all changes to the table.

Modifying search settings

The Toolkit's search interface allows you to search for terms within a field. You can customize which fields are available for searching.

1. From the **Admin Menu**, select **Configure Application**.

2. Double click on the table that contains the fields that you wish to change searching/sorting settings.

3. Double click on the appropriate field in the list.

4. In the **Database Field** window, click on the **Include in Search Editor** checkbox to change the setting.

5. Press **OK** to save the field record.

6. Repeat until desired modifications are made.

7. Press **OK** to save all changes to the table.

Modifying rollover tips

Rollover tips contain text that appears when you allow your cursor to hover over a field label. They help to provide guidance during the data entry process. rollover tips are composed of a definition and examples. You may modify either of these fields.

1. From the **Admin Menu**, select **Configure Application**.

2. Double click on the table that contains the field(s) you wish to customize.

3. Double click on the appropriate field in the list.

4. In the **Database Field** window, modify the **Definition** and/or **Examples**.

5. Press **OK** to save the field record.

6. Repeat until desired modifications are complete.

7. Press **OK** to save all changes to the table.

Modifying the date format setting

The system date format establishes a standardized format for entering and displaying all transaction dates (i.e., dates that are not for descriptive purposes). This includes accession date, acknowledgement date, etc.

1. From the **Admin Menu**, select **View/Edit Date Format Setting**.
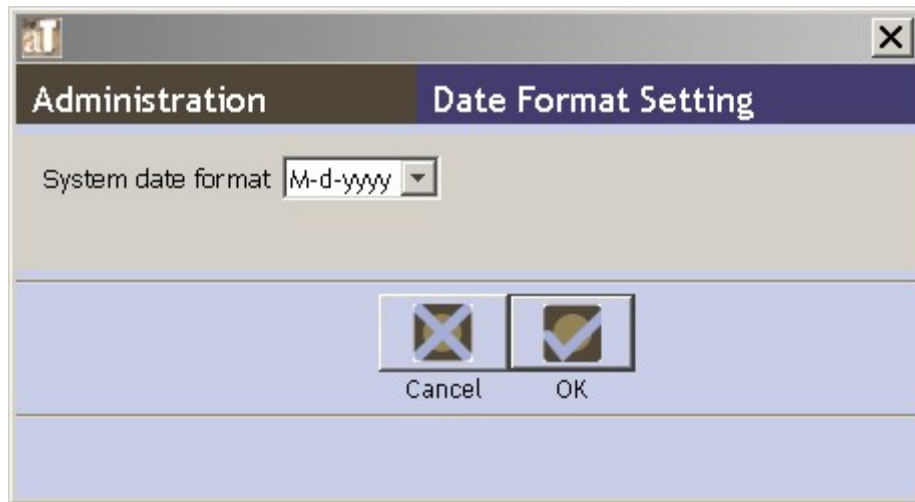
2. Choose the desired **System date format**.

3. Press **OK** to save the record.

Lookup lists

Overview

Lookup lists provide a set of predefined values that can be selected during data entry to populate a field. The Toolkit comes with a number of pre-defined lookup lists. You can modify many of these lists, though there are some that can not be modified because their values are necessary for correct operation of the Toolkit, or necessary in order to produce valid standardized outputs such as EAD or MODS. You may also create a new lookup list, for example if you wish to control data entry for a certain field or speed data entry by presenting a list of commonly used values.

> Note: As of Version 1.0 it is not possible to assign a lookup list to a field that did not previously contain a lookup list. It is possible, however, to change the lookup list that a field is linked to, if the field is already configured to use a lookup list.
>
> You will find a table listing the predefined AT lookup lists, the field to which they are linked, and the type of lookup list in the appendices.

Creating lookup lists

1. From the **Admin Menu**, select **View/Edit Lookup Lists**.

Edit Lookup Lists

List Name △
Acquisition type
Actuate
Calendar
Container types
Description rules
Digital object types
Era
Extent type
File use attributes
Finding aid status
Index Value Types
Instance types
Language codes
List Numeration Types
Name Description Type
Name link creator / subject role
Name link form
Name link function
Name link source role
Name rules
Name source
Name type
Render
Repository Note Types
Resource component levels

Add Record   Remove Records   Done

2. Press **Add Record**.

3. Enter a **List Name** to identify the list.

4. To enter terms manually:

    a. Press **Add Item**.

    b. The Toolkit will prompt you to enter a new value for the list. Enter the value and press **OK**.

    c. Repeat until you've entered all values for the list.

5. To import a list:

    a. Press **Import Items**.
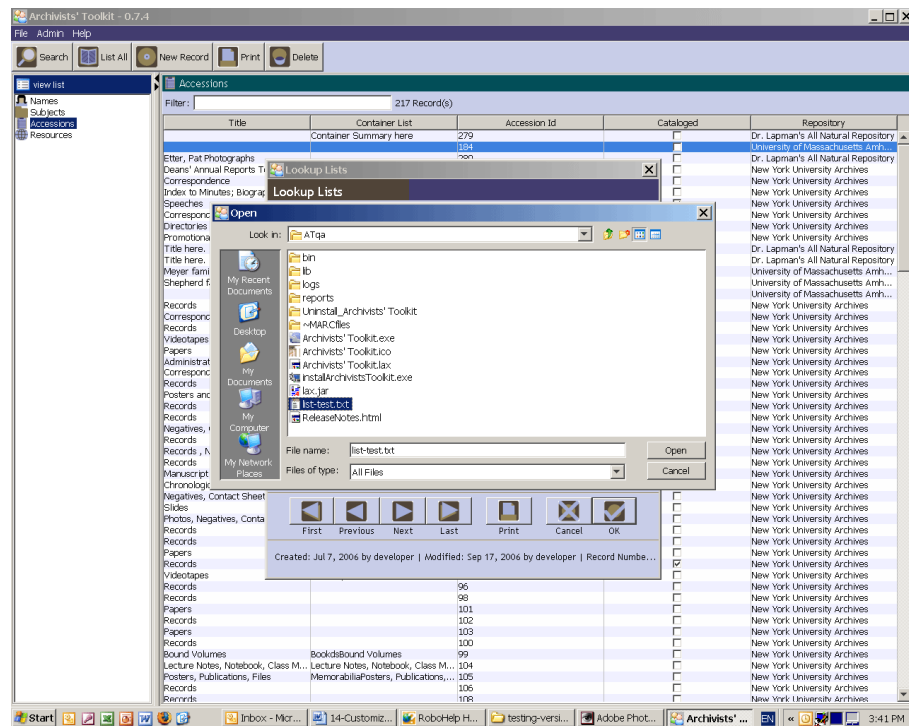
b. Select the file you wish to import. The list must be in a plain text file, with each item in the list on a single line. For example:

```
List item 1
List item 2
List item 3
```

c. Press **Open**. The new values will appear in the list.

d. Press **OK** to save the list.

Editing lookup lists

You may delete a lookup list or edit an existing lookup list by adding, deleting, changing, or merging items in a list, or by importing terms.

> Note: Editing a lookup list may cause changes in some records. If any of the records to be changed are invalid, or if the edit would create duplicate records, the Toolkit will return an error message and you will be unable to complete the operation. More information about data cleanup of imported data is available in Chapter 5.

Deleting a lookup list

1. From the **Admin Menu**, select **View/Edit Lookup Lists**.
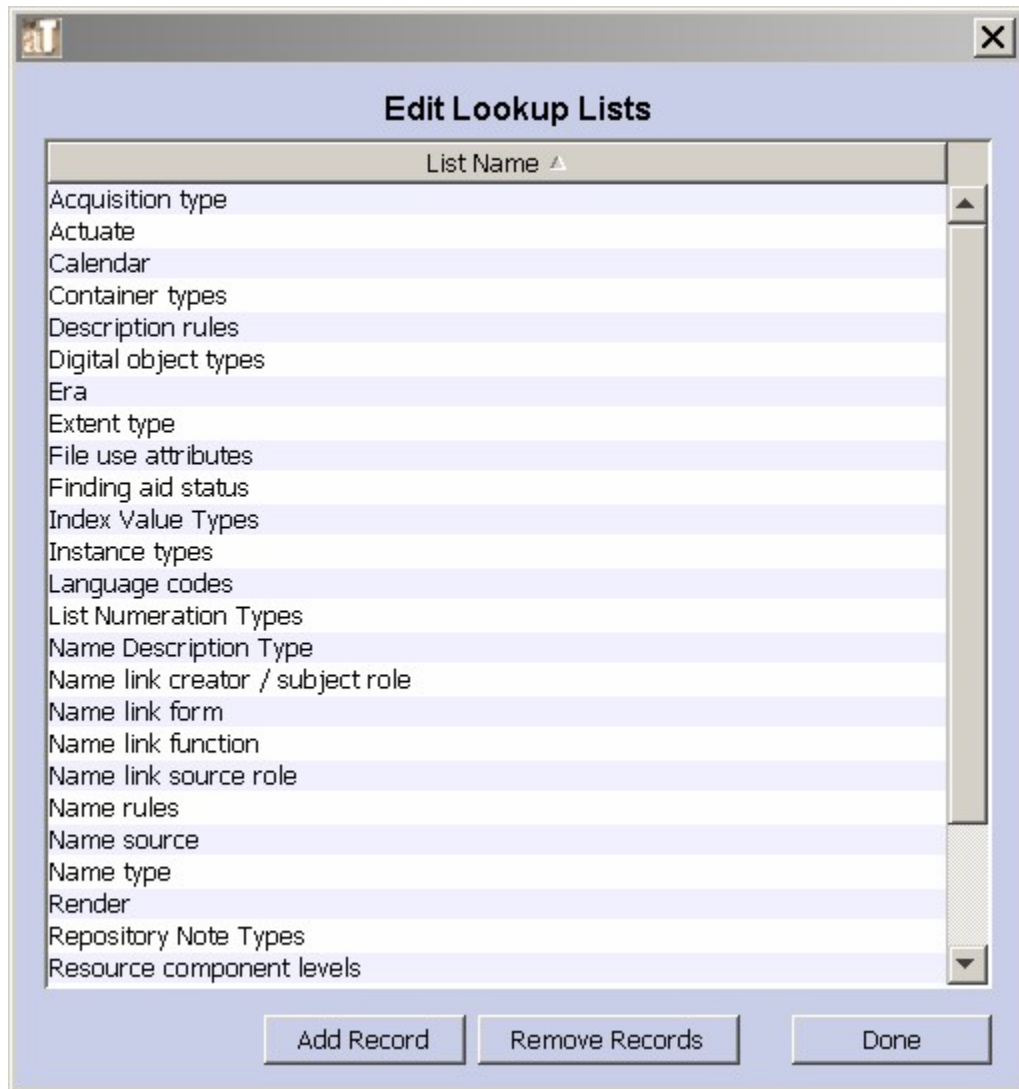
2. Select the name of the lookup list you wish to delete and press **Remove Records**.

3. The Toolkit will prompt you to confirm deletion of the list. Press **Yes** to delete the list.

Deleting items from a lookup list

1. From the **Admin Menu**, select **View/Edit Lookup Lists**.

2. Double click on the list you wish to modify.

3. Select the value that you wish to delete.

4. Press **Remove Item**.

5. Because editing a lookup list value may result in changing records that contain that value, the Toolkit will respond with the number of records that you will be updating, and ask you to confirm that you wish to update those records. Press **Yes** to change the list and update any records that use the value being modified.

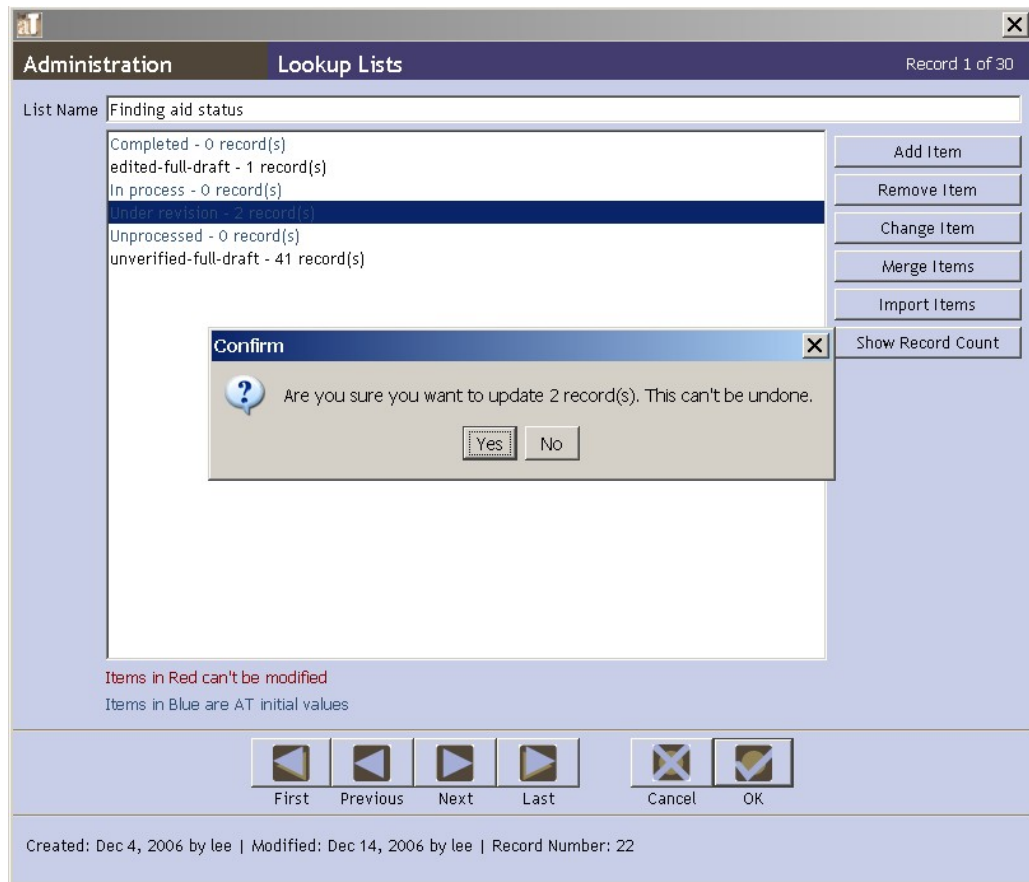6. The Toolkit will verify the number of records that have been modified. Press **OK**.

> Caution: If any of the records to be modified were imported into the Application and are not valid records, the operation cannot be performed, and the Toolkit will return an error message.

5. Press **OK** to save the list.

Changing items in a lookup list

1. From the **Admin Menu**, select **View/Edit Lookup Lists**.

2. Double click on the list you wish to modify.

3. Select the value that you wish to edit.
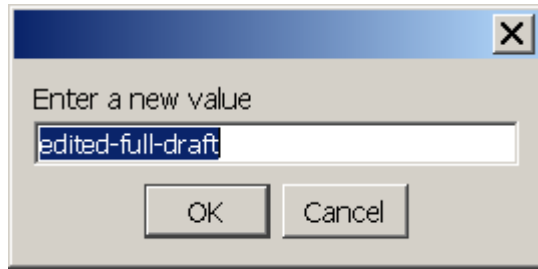
4. Press **Change Item.**

5. Enter a new value.

6. Because editing a lookup list value may result in changing records that contain that value, the Toolkit will respond with the number of records that you will be updating, and ask you to confirm that you wish to update those records. Press **Yes** to change the list and update any records that use the value being modified.

7. The Toolkit will verify the number of records that have been modified. Press **OK**.

8. Press **OK** to save the list.

Merging items in a lookup list

1. From the **Admin Menu**, select **View/Edit Lookup Lists**.

2. Double click on the list you wish to modify.

3. Select the first value to be merged.

4. Holding down the control (CTRL) key, select the second value to be merged.

5. Press **Merge Items.**

6. Select the item to merge into (the value to which both sets of records should be linked).

7. The Toolkit will respond with the number of records that you will be updating, and ask you to confirm that you wish to update those records. Press **Yes** to change the list and update any records that use the value being modified.
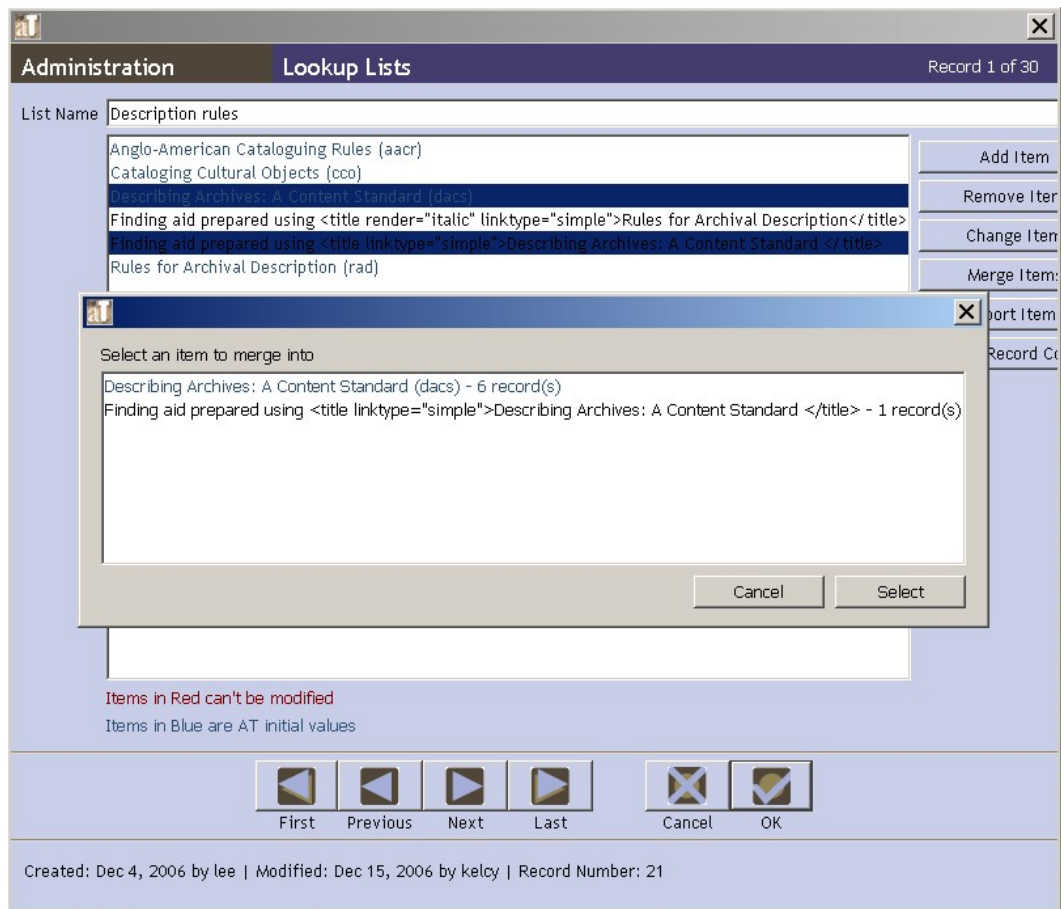
8. The Toolkit will verify the number of records that have been modified. Press **OK**.

9. Press **OK** to save the list.

Importing items into a lookup list

1. From the **Admin Menu**, select **View/Edit Lookup Lists**.:

2. Press **Import Items**.
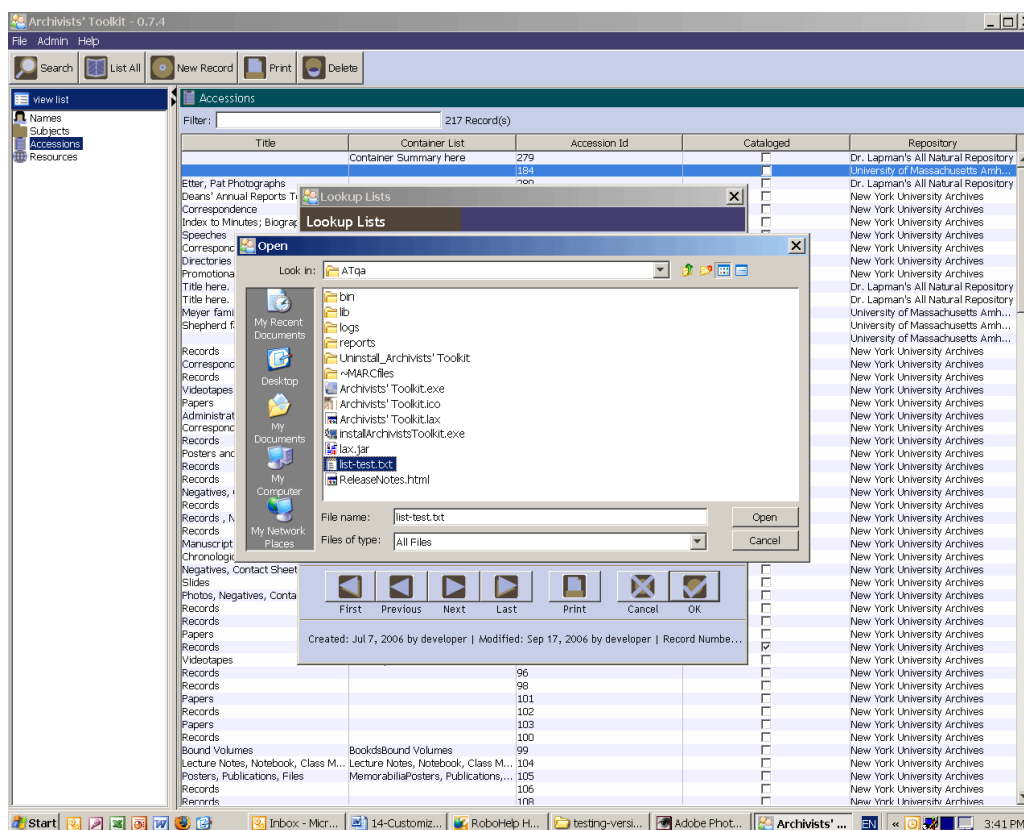
3. Select the file you wish to import. The list must be in a plain text file, with each item in the list on a single line. For example:

```
List item 1
List item 2
List item 3
```

The new values will be added to those already in the list. If the imported list duplicates items already in the list, these duplicate values will not be imported.

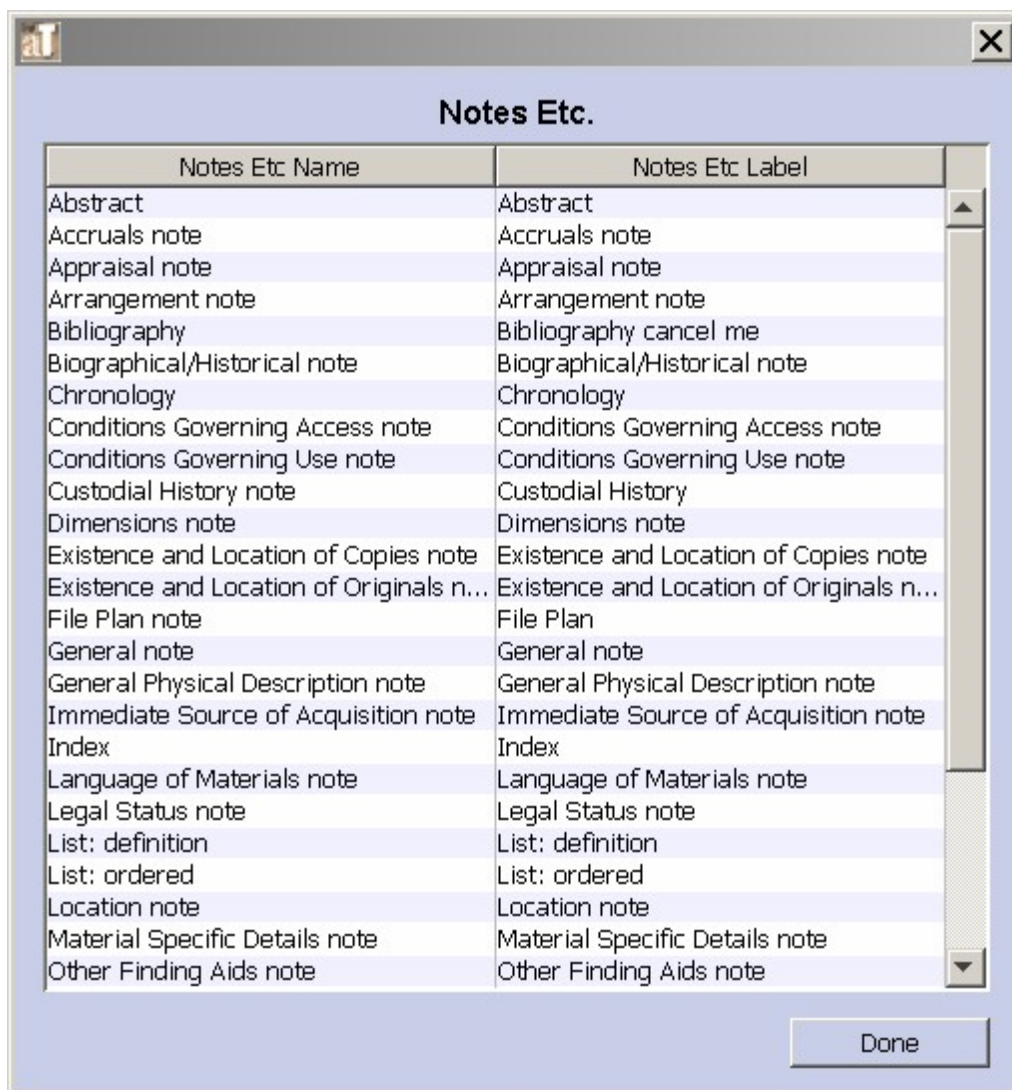4. Press **OK** to save the list.

Configuring note options

For any of the descriptive notes, you can customize the label that appears in the Toolkit's interface.

> Note: To customize the title of the note that is output as a header in EAD, print finding aids, and other descriptive outputs, you must edit the default value for notes. Instructions are provided in the Default Values section of this chapter.

1. From the **Admin Menu**, select the option to **View/Edit Notes Etc.**.

2. Double click on the note that you wish to customize.
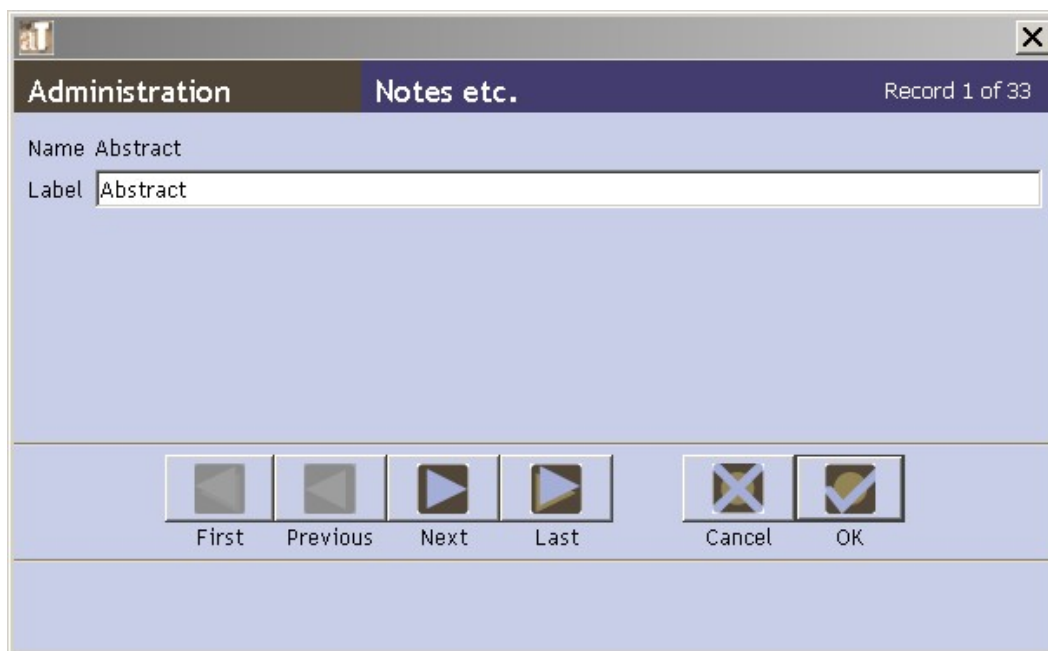
3. Edit the **Label**.

4. Press **OK** to save the note record.

5. Repeat until you have completed the desired customizations.

6. Press **Done** to save the customizations.

Note: These customizations will not appear in the interface until the application has been restarted.