Chapter 15

Customizing the Archivists' Toolkit^{TM}

Overview

The Archivists' Toolkit™ provides a number of customization features that allow for maximum 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 search settings, and editing rollover tips that appear for each field

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

- customize default titles for notes

- configure user-defined fields in the accession record

- ingest customized reports

These options can increase data entry efficiency and provide 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 relevant appendices. Customization options are only available to those with Superuser (Access Class 5) and Repository Manager (Access Class 4) permission levels. Superusers are permitted to do all customizations; Repository Managers can establish default values for their repository and edit lookup lists.

Terminology

The following terms represent concepts related to the Archivists' Toolkit™ database or interface. Familiarity with these terms is essential to understanding and using the customization features.

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

Examples:

```
Title
Extent Number
```

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.
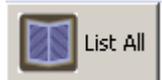
Examples:

    subjectTerm

    extentNumber

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.

Examples:

    Subject Term

    Extent Number

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 pressing the [List All] button 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 given field. The lookup list values appear during the data entry process as drop-down lists; the values that populate drop-down lists are from lookup lists.

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 to be customized, you must know which table contains the field. In the **Lookup Lists** appendix, you will find a table listing the predefined lookup lists, the field to which they are linked, and the type of lookup list.

Default values

Overview

If your repository uses boilerplate text (i.e. text that can be reused without change) for particular fields or notes, you may wish to create a default value so that the same data does not need to be entered repeatedly. 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. 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 the repository. The default value can then be edited when necessary.

Because default values are repository-specific, they are stored as part of the repository 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 **Fields Supporting Default Values** in the appendices.

Creating a default value for a field

1. From the **Setup** menu, select **Repositories**.

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

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

ArchivistsToolkit

| Repository Info | Repository Statistics | Default Values | Notes |

Fields

At Field	Table Name	Value As String

[Add Default Value]   [Remove Default Value]

Default Values for notes

Note Type △	Default Title	Default Content
Abstract		
Accruals note		
Appraisal note		
Arrangement note		
Bibliography		
Biographical/Historical note		
Conditions Governing Access note		
Conditions Governing Use note		
Custodial History note		
Dimensions note		
Existence and Location of Copies …		
Existence and Location of Origina…		
File Plan note		
General note		

| First | Previous | Next | Last | | Cancel | OK |

Created: Jun 22, 2007 by | Modified: Jun 26, 2007 by A2Ross | Record Number: 1

4. Press the [Add Default Value] button.
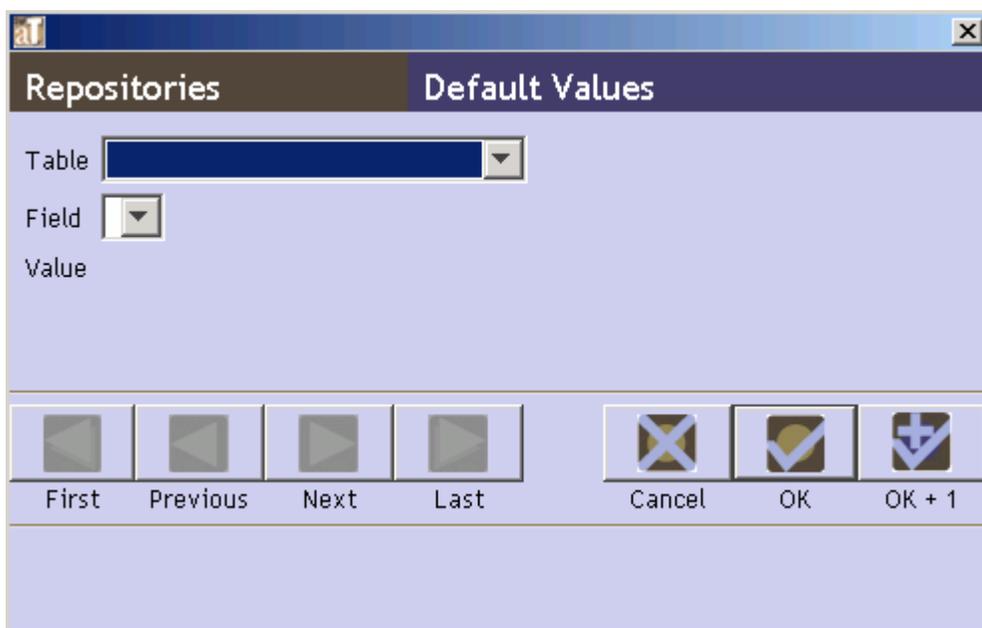
5. Select the appropriate **Table**, then the **Field** for which you are establishing a default value.

Note: **Fields Supporting Default Values** appendix may assist you in locating the field for which you want to create a default value.

Depending on which option is available:

6. Enter the default text in the **Value** field.
    or
    Check the **Boolean Value** box.
    or
    Select the appropriate **Value** from the drop-down list.

7. Save the default value record by pressing the **OK** button at the bottom right corner of the window. If you are entering multiple records, the **OK + 1** button will save the record you are working in and open a new default value record.

Creating a default title and default value for a note

1. From the **Setup** menu, select **Repositories**.

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

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

Administration   Repositories   Record 1 of 3

ArchivistsToolkit

Repository Info | Repository Statistics | Default Values | Notes
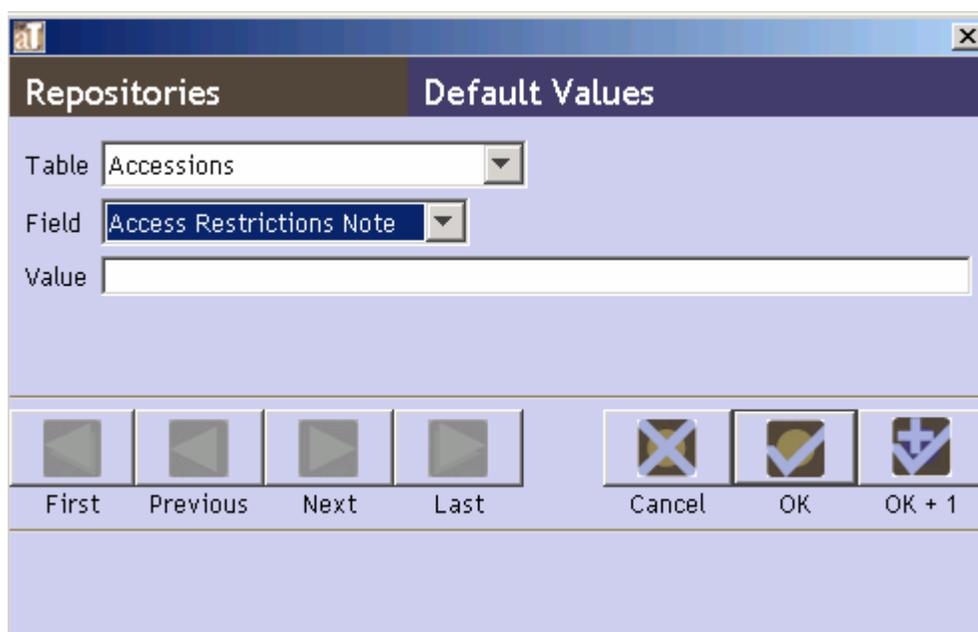
Fields

At Field	Table Name	Value As String

Add Default Value   Remove Default Value

Default Values for notes

Note Type △	Default Title	Default Content
Abstract		
Accruals note		
Appraisal note		
Arrangement note		
Bibliography		
Biographical/Historical note		
Conditions Governing Access note		
Conditions Governing Use note		
Custodial History note		
Dimensions note		
Existence and Location of Copies ...		
Existence and Location of Origina...		
File Plan note		
General note		

First   Previous   Next   Last   Cancel   OK

Created: Jun 22, 2007 by | Modified: Jun 26, 2007 by A2Ross | Record Number: 1

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

Note Type   Abstract

Default Title

Default Content

First   Previous   Next   Last   Cancel   OK

5. Enter a **Default Title** and/or **Default Content** for the note.

6. Press the ⬜ OK button to save the record.

> Note: Default notes are not automatically added to resource records. However, when the user decides to add the note to the resource record, the default text will be present.

Editing and removing default values

1. From the **Setup** menu, select **Repositories**.

2. Open the repository record by double-clicking on the 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 the Remove Default Value button.
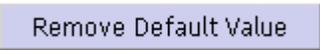
5. Press the **OK** button to save the record.

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 field columns that appear in list screens
- customize which fields are available in the search interface
- edit rollover tips, including field definitions and examples

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. The user-defined fields should be implemented for this purpose.

1. From the **Setup** menu, select **Configure Application**.

Configure Application

Table Name △
Accessions
AccessionsLocations
AccessionsResources
ArchDescriptionAnalogInstances
ArchDescriptionInstances
ArchDescriptionNames
ArchDescriptionNotes
ArchDescriptionRepeatingData
ArchDescriptionSubjects
BibItems
Bibliography
ChronologyItems
ChronologyList
DatabaseFields
DatabaseTables
Deaccessions
DefaultValues
DigitalObjects
Events
ExternalReference
FileVersions
Index
IndexItems
ListDefinition
ListDefinitionItems

Done

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

Configure Application   **Database Tables**   Record 1 of 42

Table Name Accessions
Fields

Field Name △	Field Label	Data Type	Return Screen Order
accessionDate	Accession Date	java.util.Date	0
accessionDispositionNote	AccessionDispositionNote	java.lang.String	0
accessionId	Accession Id	java.lang.Long	0
accessionNumber	Accession Number		1
accessionNumber1	Accession Number	java.lang.String	0
accessionNumber2	Accession Number	java.lang.String	0
accessionNumber3	Accession Number	java.lang.String	0
accessionNumber4	Accession Number	java.lang.String	0
accessionProcessed	Accession Processed	java.lang.Boolean	0
accessionProcessedDate	Accession Processed Date	java.util.Date	0
accessRestrictions	Access Restrictions	java.lang.Boolean	0
accessRestrictionsNote	Access Restrictions Note	java.lang.String	0
acknowledgementDate	Acknowledgement Date	java.util.Date	0
acknowledgementSent	Acknowledgement Sent	java.lang.Boolean	0
acquisitionType	Acquisition Type	java.lang.String	0
agreementReceived	Agreement Received	java.lang.Boolean	0
agreementReceivedDate	Agreement Received	java.util.Date	0
agreementSent	Agreement Sent	java.lang.Boolean	0
agreementSentDate	Agreement Sent	java.util.Date	0
bulkDateBegin	Bulk Date Begin	java.lang.Integer	0
bulkDateEnd	Bulk Date End	java.lang.Integer	0
cataloged	Cataloged	java.lang.Boolean	0
catalogedDate	Cataloged Date	java.util.Date	0
catalogedNote	Cataloged Note	java.lang.String	0
conditionNote	Condition	java.lang.String	0
containerSummary	Container Summary	java.lang.String	0

First   Previous   Next   Last   Cancel   OK

Created: Oct 22, 2007 by a2ross | Modified: Oct 22, 2007 by a2ross | Record Number: 1

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

Configure Application   **Database Fields**

Field Name	containerSummary
Field Label	Container Summary
Data Type	java.lang.String
	☑ Include In Search Editor
Return Screen Order	0
Definition	A natural language statement for listing the number and type of containers housing the contents of the accession.
Examples	10 record cartons, 3 archive boxes, and 4 map folders.

First   Previous   Next   Last   Cancel   OK

Created: Oct 22, 2007 by a2ross | Modified: Oct 22, 2007 by a2ross | Record Number: 10

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

5. Press the [OK] button to save the field record.

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

7. Press the [OK] button to save all changes to the table.

8. The application will now show the modified field label in applicable screens.

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. Refer to the **List Screen Defaults** appendix for assistance.

1. From the **Setup** menu**,** select **Configure Application**.
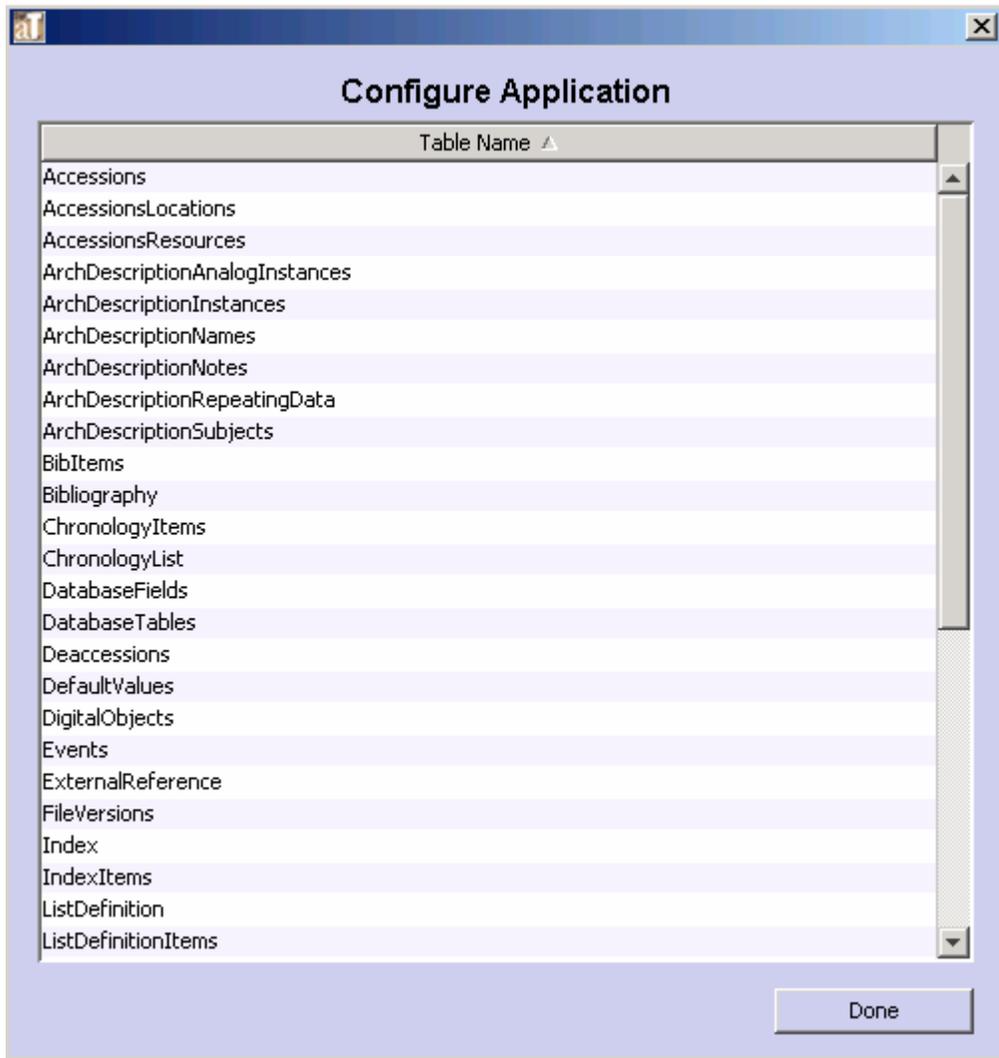
2. Double-click on the table that contains the field you wish to add to or remove from the list screen.

Table Name Accessions
Fields

Field Name △	Field Label	Data Type	Return Screen Order
accessionDate	Accession Date	java.util.Date	0
accessionDispositionNote	Accession Disposition Note	java.lang.String	0
accessionId	Accession Id	java.lang.Long	0
accessionNumber	Accession Number		1
accessionNumber1	Accession Number1	java.lang.String	0
accessionNumber2	Accession Number2	java.lang.String	0
accessionNumber3	Accession Number3	java.lang.String	0
accessionNumber4	Accession Number4	java.lang.String	0
accessRestrictions	Access Restrictions	java.lang.String	0
acknowledgementDate	Acknowledgement Date	java.util.Date	0
acquisitionType	Acquisition Type	java.lang.String	0
agreementReceived	Agreement Received	java.util.Date	0
agreementSent	Agreement Sent	java.util.Date	0
bulkDateBegin	Bulk Date Begin	java.lang.Integer	0
bulkDateEnd	Bulk Date End	java.lang.Integer	0
cataloged	Cataloged	java.lang.Boolean	0
catalogedNote	Cataloged Note	java.lang.String	0
conditionNote	Condition Note	java.lang.String	0
containerSummary	Container Summary	java.lang.String	0
created	Created	java.util.Date	0
createdBy	Created By	java.lang.String	0
dateBegin	Date Begin	java.lang.Integer	0
dateEnd	Date End	java.lang.Integer	0
dateExpression	Date Expression	java.lang.String	0
dateProcessed	Date Processed	java.util.Date	0
description	Description	java.lang.String	0

First   Previous   Next   Last   Cancel   OK

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

4. In the **Database Fields** window, enter a value in the **Return Screen Order** 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.

    Note: The Toolkit does not prevent you from creating duplicate entries in this field. If you enter 3 for one field 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 the [OK] button to save the field record.

6. Repeat until desired modifications are made.

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

8. The field column will now appear in the List Screen view.

> Note: Column listing order can also be changed by dragging and dropping the
> Field Name column heading to the desired place in the screen listing. This
> change is not permanent, however, and the previous order will be restored upon
> leaving this list screen view.

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 **Setup** menu, select **Configure Application**.

Configure Application

Table Name △
Accessions
AccessionsLocations
AccessionsResources
ArchDescriptionAnalogInstances
ArchDescriptionInstances
ArchDescriptionNames
ArchDescriptionNotes
ArchDescriptionRepeatingData
ArchDescriptionSubjects
BibItems
Bibliography
ChronologyItems
ChronologyList
DatabaseFields
DatabaseTables
Deaccessions
DefaultValues
DigitalObjects
Events
ExternalReference
FileVersions
Index
IndexItems
ListDefinition
ListDefinitionItems

Done

2. Double-click on the table that contains the field for which you wish to change search settings.

Table Name Accessions
Fields

Field Name △	Field Label	Data Type	Return Screen Order
accessionDate	Accession Date	java.util.Date	0
accessionDispositionNote	Accession Disposition Note	java.lang.String	0
accessionId	Accession Id	java.lang.Long	0
accessionNumber	Accession Number		1
accessionNumber1	Accession Number1	java.lang.String	0
accessionNumber2	Accession Number2	java.lang.String	0
accessionNumber3	Accession Number3	java.lang.String	0
accessionNumber4	Accession Number4	java.lang.String	0
accessRestrictions	Access Restrictions	java.lang.String	0
acknowledgementDate	Acknowledgement Date	java.util.Date	0
acquisitionType	Acquisition Type	java.lang.String	0
agreementReceived	Agreement Received	java.util.Date	0
agreementSent	Agreement Sent	java.util.Date	0
bulkDateBegin	Bulk Date Begin	java.lang.Integer	0
bulkDateEnd	Bulk Date End	java.lang.Integer	0
cataloged	Cataloged	java.lang.Boolean	0
catalogedNote	Cataloged Note	java.lang.String	0
conditionNote	Condition Note	java.lang.String	0
containerSummary	Container Summary	java.lang.String	0
created	Created	java.util.Date	0
createdBy	Created By	java.lang.String	0
dateBegin	Date Begin	java.lang.Integer	0
dateEnd	Date End	java.lang.Integer	0
dateExpression	Date Expression	java.lang.String	0
dateProcessed	Date Processed	java.util.Date	0
description	Description	java.lang.String	0

First   Previous   Next   Last   Cancel   OK

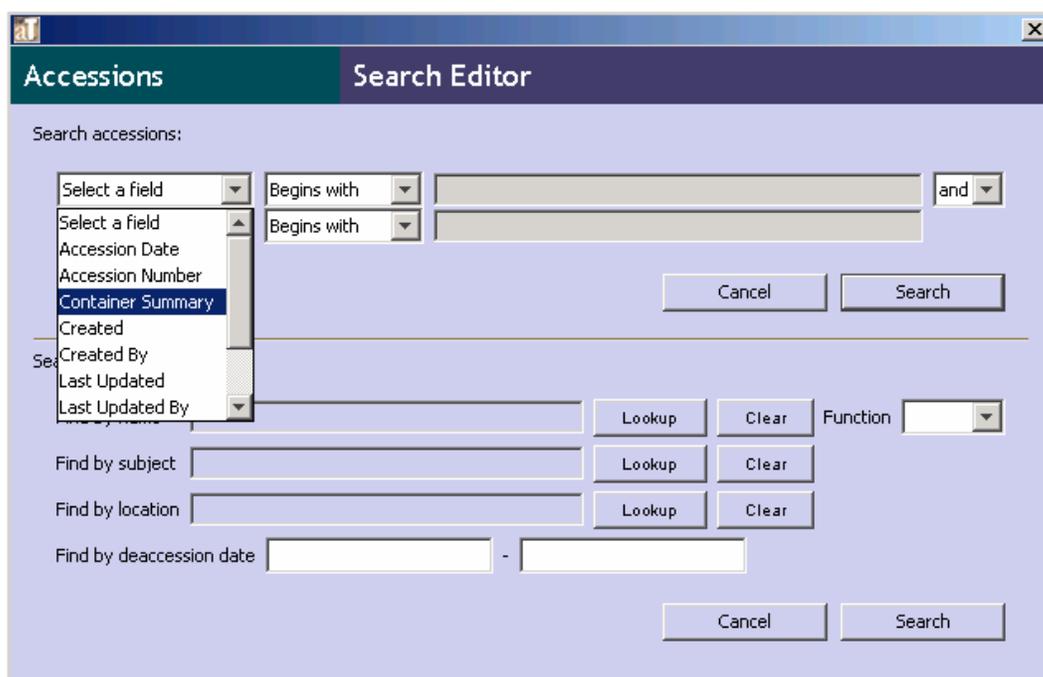3. Double-click on the appropriate field in the list.

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

5. Press [OK] button to save the field record.

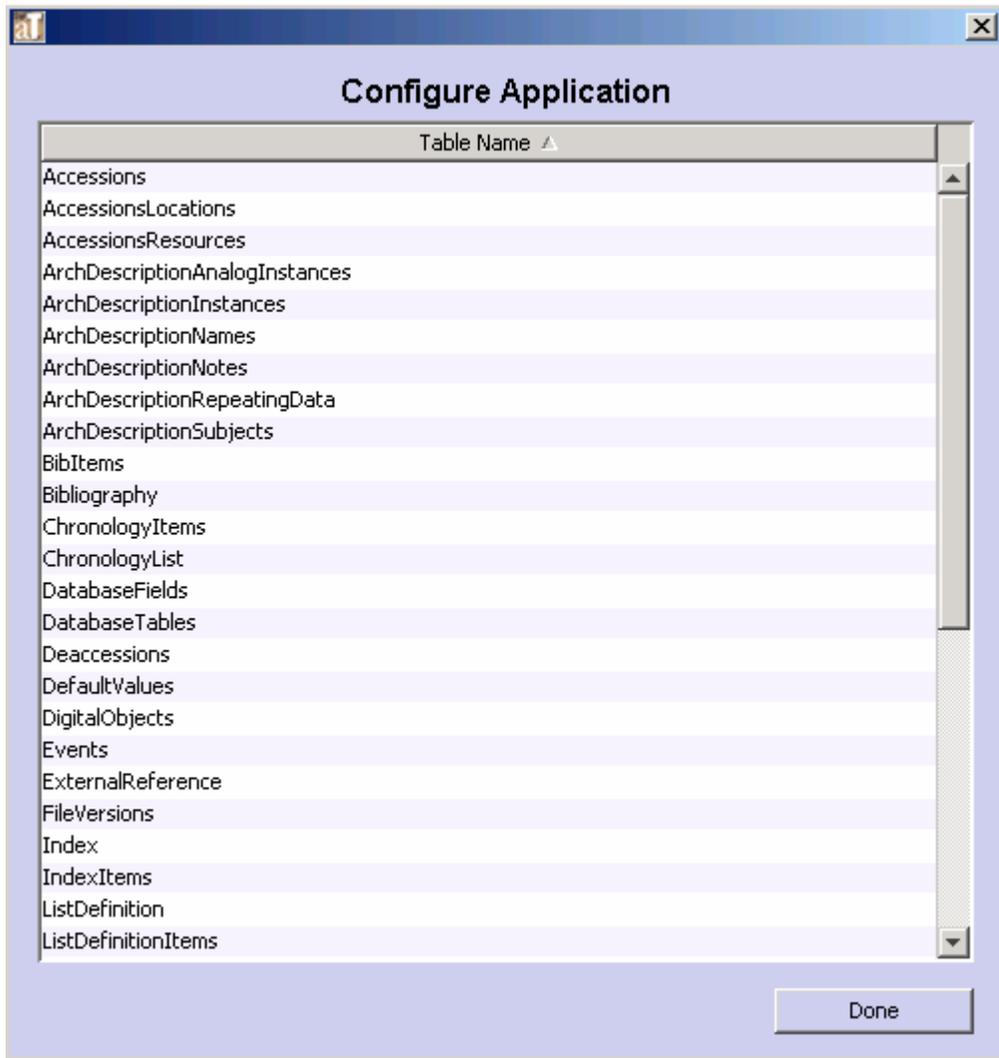6. Repeat until desired modifications are complete.

7. Press the [OK] button to save all changes to the table.

8. The field will now appear as an option in the drop-down list in the **Search Editor**.
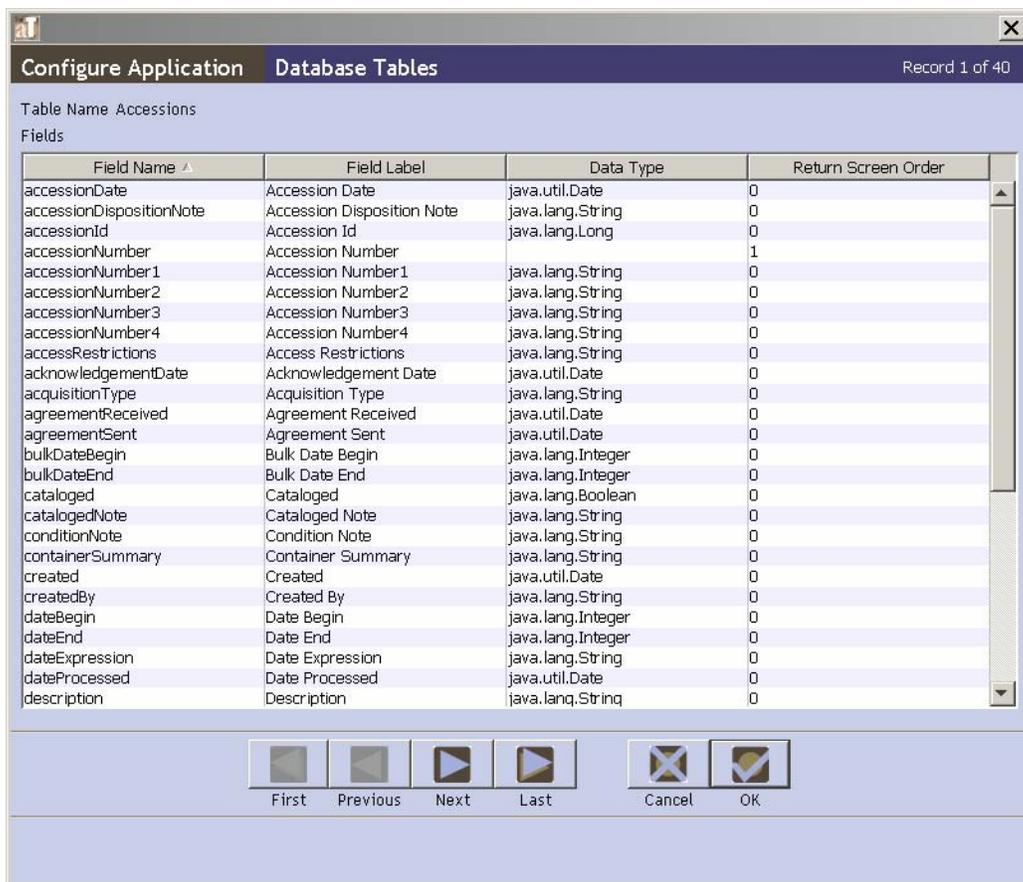
Modifying rollover tips

Rollover tips contain text that appears when the cursor hovers over a field label. They provide guidance during the data entry process. Rollover tips are composed of a definition and examples. You may modify either of these fields. Rollovers are a good place to integrate repository processing / description policy into the AT application.

1. From the **Setup** menu, select **Configure Application**.

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

Configure Application   Database Tables

Table Name Accessions
Fields

Field Name △	Field Label	Data Type	Return Screen Order
accessionDate	Accession Date	java.util.Date	0
accessionDispositionNote	Accession Disposition Note	java.lang.String	0
accessionId	Accession Id	java.lang.Long	0
accessionNumber	Accession Number		1
accessionNumber1	Accession Number1	java.lang.String	0
accessionNumber2	Accession Number2	java.lang.String	0
accessionNumber3	Accession Number3	java.lang.String	0
accessionNumber4	Accession Number4	java.lang.String	0
accessRestrictions	Access Restrictions	java.lang.String	0
acknowledgementDate	Acknowledgement Date	java.util.Date	0
acquisitionType	Acquisition Type	java.lang.String	0
agreementReceived	Agreement Received	java.util.Date	0
agreementSent	Agreement Sent	java.util.Date	0
bulkDateBegin	Bulk Date Begin	java.lang.Integer	0
bulkDateEnd	Bulk Date End	java.lang.Integer	0
cataloged	Cataloged	java.lang.Boolean	0
catalogedNote	Cataloged Note	java.lang.String	0
conditionNote	Condition Note	java.lang.String	0
containerSummary	Container Summary	java.lang.String	0
created	Created	java.util.Date	0
createdBy	Created By	java.lang.String	0
dateBegin	Date Begin	java.lang.Integer	0
dateEnd	Date End	java.lang.Integer	0
dateExpression	Date Expression	java.lang.String	0
dateProcessed	Date Processed	java.util.Date	0
description	Description	java.lang.String	0

First   Previous   Next   Last   Cancel   OK

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

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

5. Press the ___OK___ button to save the field record.

6. Repeat until desired modifications are complete.

7. Press the ___OK___ button to save all changes to the table.

8. The rollover windows will now reflect the modified changes.

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 **Setup** menu, select **Date Format Setting**.

2. Choose the desired **System date format**.

3. Press the button to save the record.
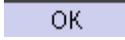
4. The changes will take place once the application is restarted.

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 either their values are necessary for correct operation of the Toolkit, or are necessary in order to produce valid standardized outputs such as EAD or MODS.

> Note: You will find a table listing the predefined AT lookup lists, the fields to which they are linked, and the type of lookup list in the appendices.

The Lookup Lists list view

The **Lookup List** list view contains the **List Name**, **List Items**, **Codes**, whether the List Items and Codes are paired values, and whether the List Items are restricted To Nmtoken.

List Name. Contains the name of the lookup list. These can all be customized.

List Items. These are items that appear on the lookup lists. Some items cannot be modified and are presented in red text to signify their immutability. Items listed in blue text are AT initial values. Any items added by the repository are listed in black text. The differences in color helps highlight which items are repository customizations. Some list items will have the **Restrict To Nmtoken** box activated. This is to signify that these items have specific constraints to follow for correct XML formatting.

Codes. Codes generally are abbreviations for **List Items**. For example, the code for the English language is eng. Because these codes represent **List Items**, they are considered paired with particular **List Items**, and thus the **Paired Values** box is activated.
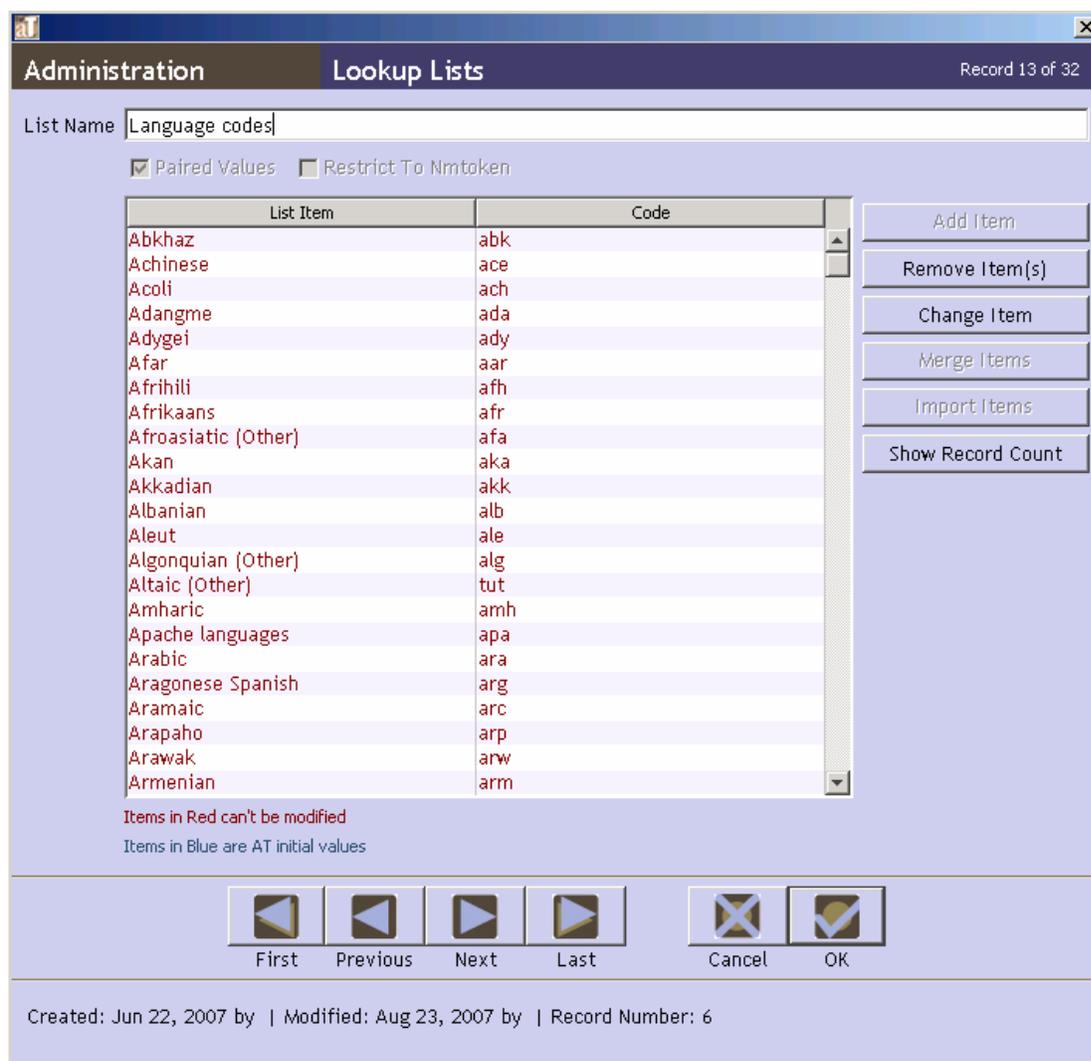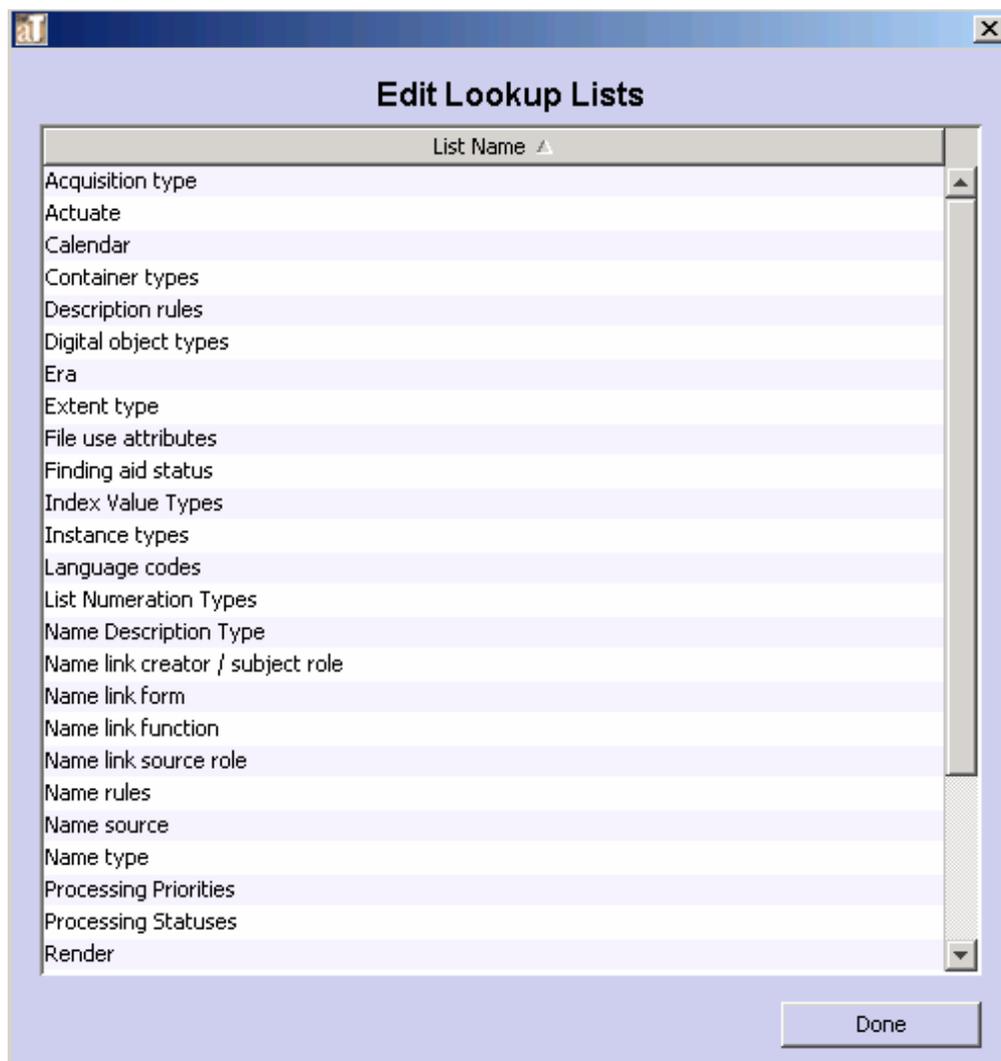

Using the Show Record Count Function

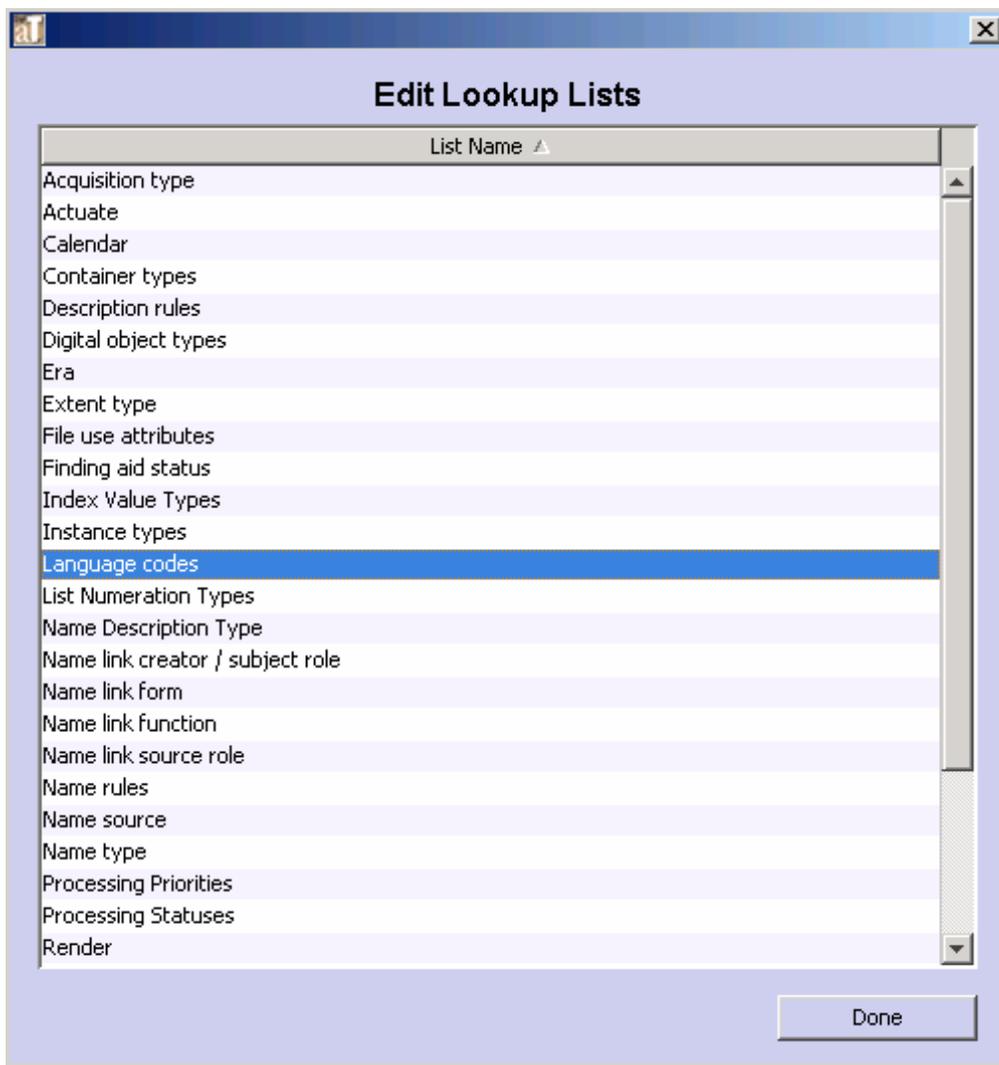Editing or deleting lookup list values can cause changes in the records that contain those values. To determine how many records will be affected, use the **Show Record Count** function to list the number of records that contain lookup list values.

To use the **Show Record Count** function:
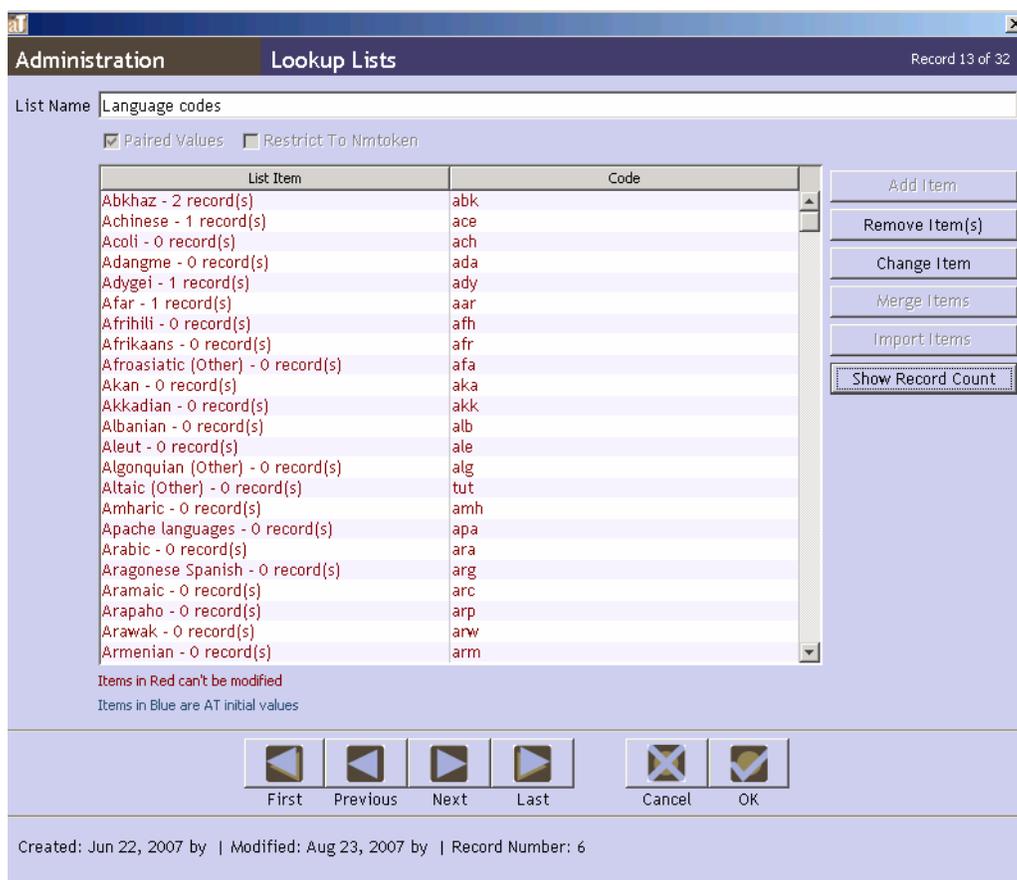
1. From the **Setup** menu, select **Lookup Lists**.

2. Double-click on the name of the lookup list you wish to view.

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
Processing Priorities
Processing Statuses
Render

Done

3. Click on the [Show Record Count] button.

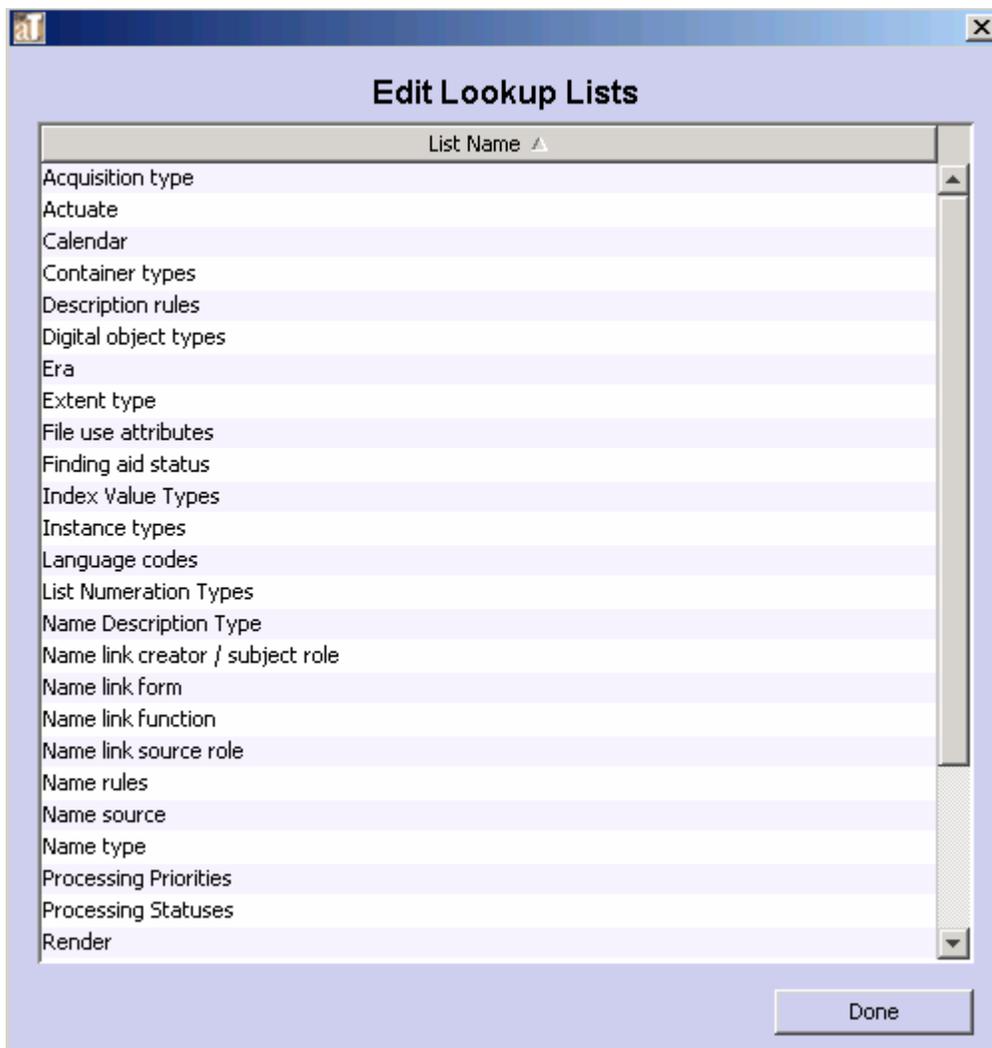The list will now display how many records are linked to each list item
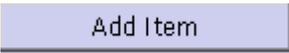
Editing lookup lists

You may edit an existing lookup list by adding, deleting, changing, or merging items in a list, or by importing terms.
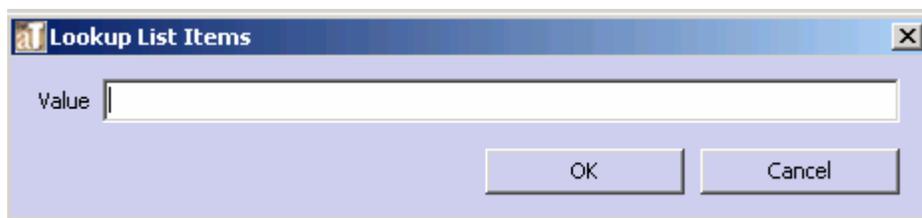
Note: Editing a lookup list may cause changes in some records. If any of the records to be changed are invalid, or if the edit would create duplicate records, the Toolkit will return an error message and you will be unable to complete the operation. More information about data cleanup of imported data is available in Chapter 6.

1. From the **Setup** menu, select **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
Processing Priorities
Processing Statuses
Render

Done

2. Double-click on the list you want to edit.

3. To add a list item:

    a. Press the **Add Item** button.

    Lookup List Items

    Value [   ]

    OK   Cancel

    b. Enter in the value for the new list item, and press **OK**. The item will now appear in the list.

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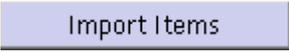
    a. Press the **Import Items** button.
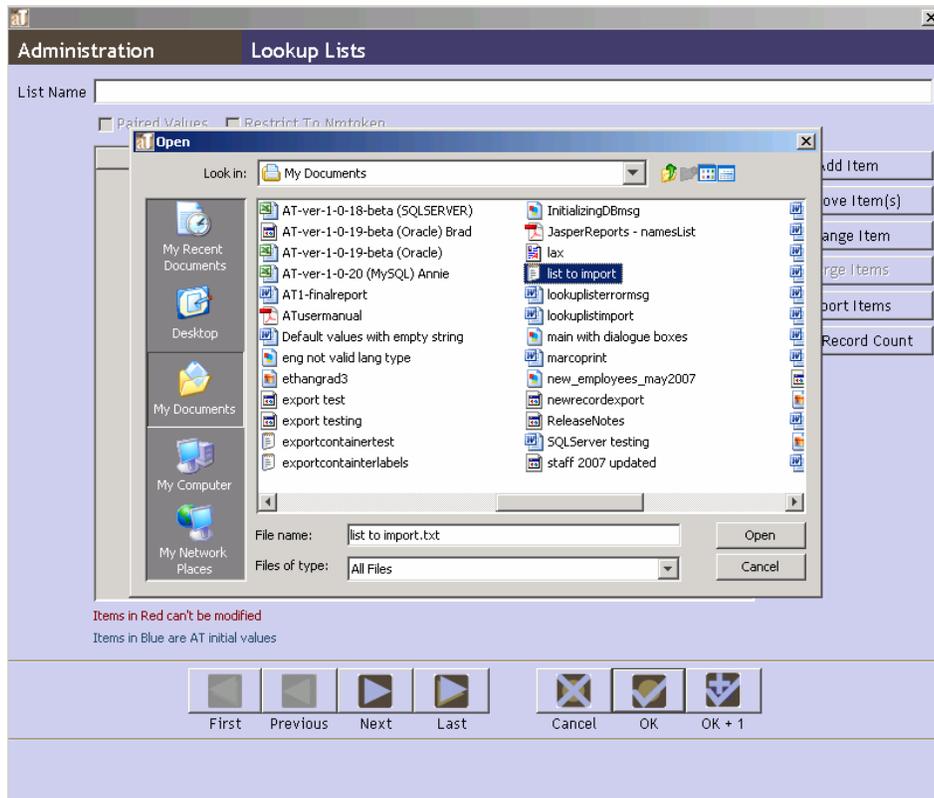
b. Select the file you wish to import. The list must be in a plain text file, with each item in the list on a single line. For example:

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

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

d. Press the [OK] button to save the list.

Deleting items from a lookup list

1. From the **Setup** menu, select **Lookup Lists**.

2. Double-click on the list to be modified. It is also possible to delete more than one item at a time by using the Shift and/or Control keys and clicking on the desired items or range of items.

3. Select the value(s) that you wish to delete.
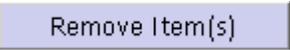
4. Press the [Remove Item(s)] button.
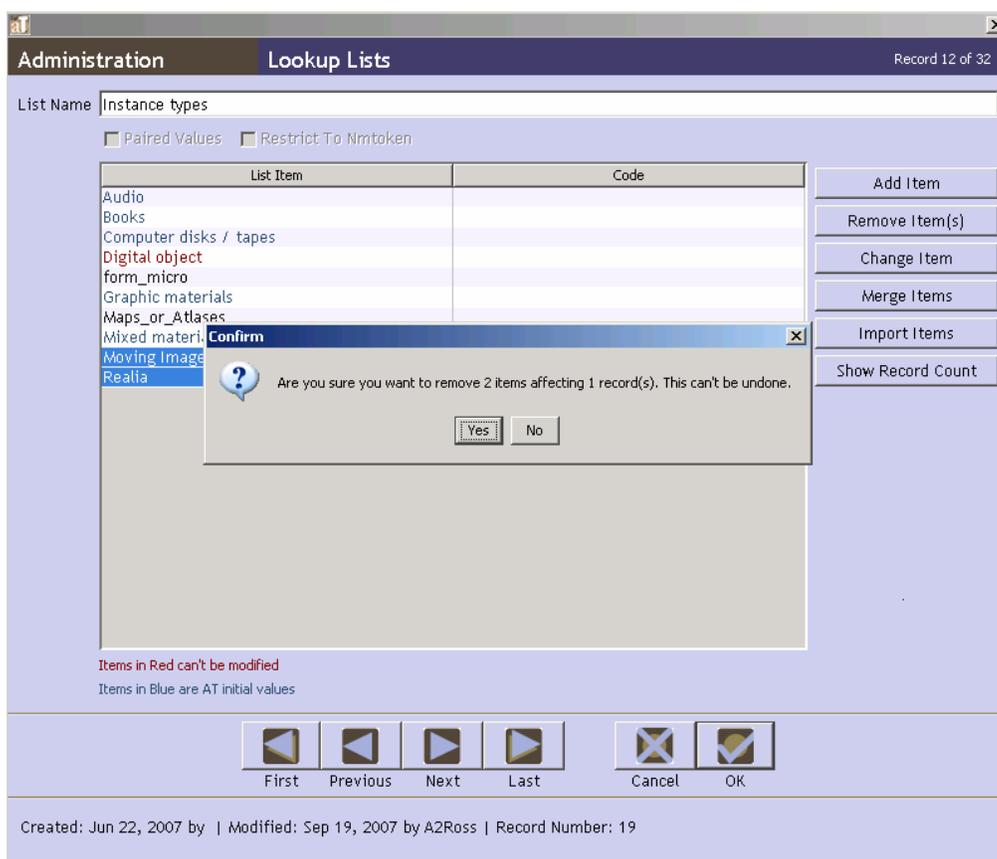
5. Because editing a lookup list value may result in changing records that contain that value, the Toolkit will respond with the number of records that you will be updating, and ask you to confirm that you wish to update those records. Press **Yes** to change the list and update any records that use the value being modified.

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

> **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.

7. Press the button to save the list.

Changing items in a lookup list

1. From the **Setup** menu**,** select **Lookup Lists**.

2. Double-click on the list to be modified.

3. Select the value that you wish to edit.

4. Press ![Change Item] button**.**

5. Edit the 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**.
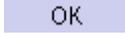
8. Press the ![OK] button to save the list.

Merging items in a lookup list

If imported records contain information in a field that is controlled by a look up list and a **List Item** does not already represent this information, a new **List Item** will be added to the lookup list. For example, if an EAD is imported with the subject source listed as "lsch" instead of "lcsh," the term "lsch" will be added to the lookup list. The merge function can be used to rectify this inconsistency.

To merge **List Items** together:

1. From the **Setup** menu, select **Lookup Lists**.

2. Double-click on the list to be modified.

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 button.

6. Select the item to merge into (the value to which both sets of records should be linked). If the item cannot be modified, it will be the only item listed because it cannot be merged into another item.
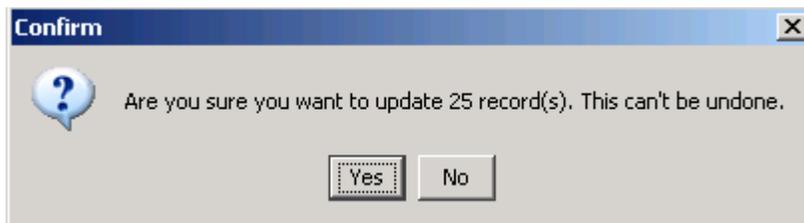
7. The Toolkit will respond with the number of records that you will be updating, and ask you to confirm that you wish to update those records. Press **Yes** to change the list and update any records that use the value being modified.

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

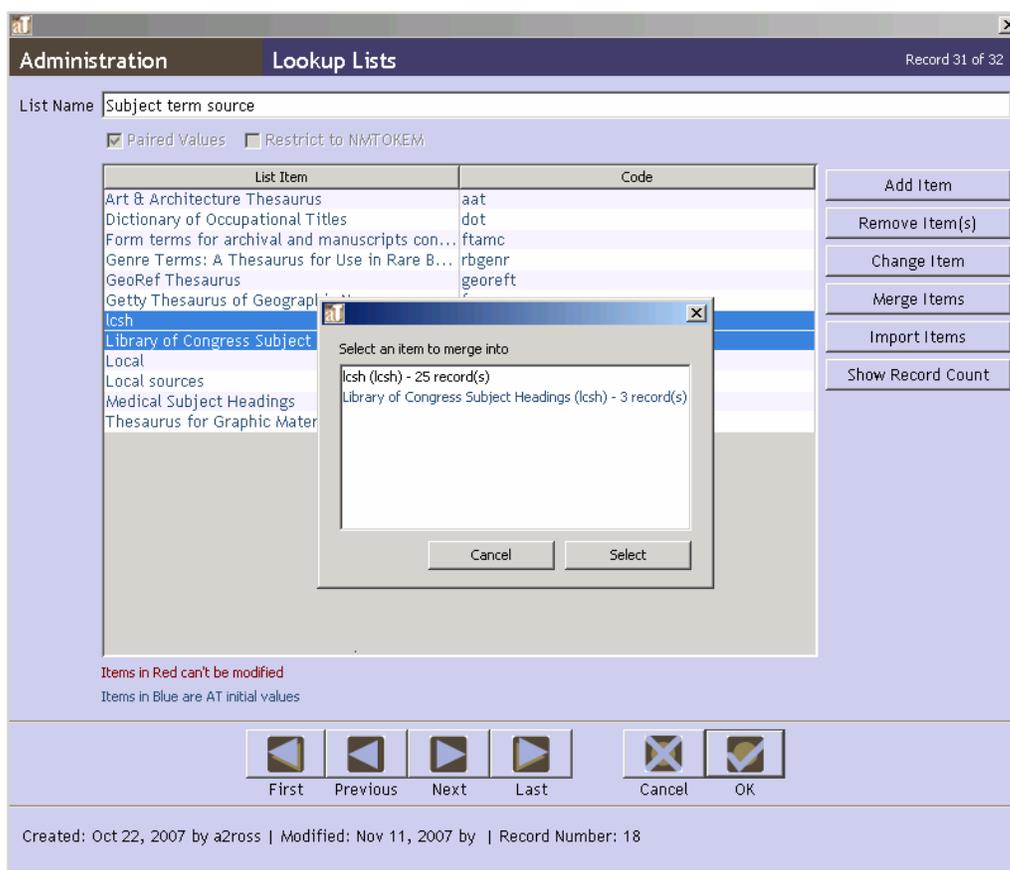9. Press the OK button to save the list.

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 **Setup** menu, select **Notes Etc.**

Notes Etc Name	Notes Etc Label
Abstract	Abstract
Accruals note	Accruals note
Appraisal note	Appraisal note
Arrangement note	Arrangement note
Bibliography	Bibliography cancel me
Biographical/Historical note	Biographical/Historical note
Chronology	Chronology
Conditions Governing Access note	Conditions Governing Access note
Conditions Governing Use note	Conditions Governing Use note
Custodial History note	Custodial History
Dimensions note	Dimensions note
Existence and Location of Copies note	Existence and Location of Copies note
Existence and Location of Originals n...	Existence and Location of Originals n...
File Plan note	File Plan
General note	General note
General Physical Description note	General Physical Description note
Immediate Source of Acquisition note	Immediate Source of Acquisition note
Index	Index
Language of Materials note	Language of Materials note
Legal Status note	Legal Status note
List: definition	List: definition
List: ordered	List: ordered
Location note	Location note
Material Specific Details note	Material Specific Details note
Other Finding Aids note	Other Finding Aids note

2. Double-click on the note for which you wish to customize the label.
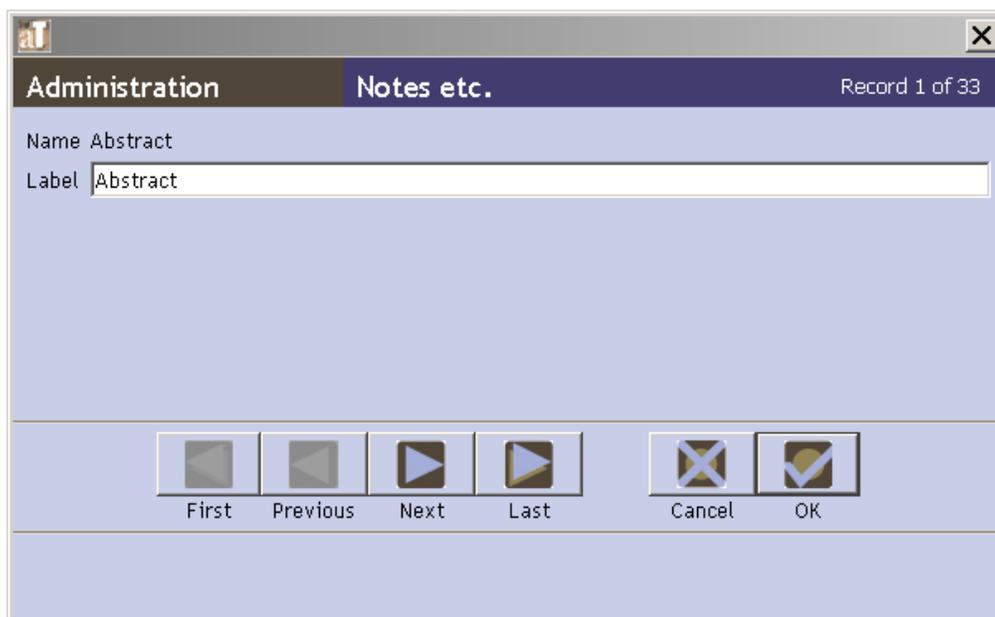
3. Edit the **Label**.

4. Press the ![OK] button to save the list.

5. Repeat until you have completed the desired customizations.

6. Press the ![Done] button to save the customizations.

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

Configuring user-defined fields

The **Accessions** record contains a **User-defined fields** tab. This section is specifically designed as a means for repositories to create their own fields to capture information not already captured by the Toolkit. User-defined fields are not included in any reports; however, repositories can create their own customized reports to include these fields. This is discussed more fully in the Customizing Reports section below.

User-defined data types

To configure user-defined fields, it is necessary to understand what types of data fields are available. It is also important to understand that user-defined fields are configured for the repository and not just a particular resource. Thus, some thought should go into determining if the user-defined element is needed for just one resource or should be available to all resources in the database. If the answer is the former, using a note might be the better solution.

The following terms are used to describe the data fields available for manipulation in the **User defined fields** tab:

Date: A field that stores a specific date. Dates must be entered according to the default date setting specified.

Boolean: A field which can have one of two values: typically true/false or yes/no.

Integer: A number field limited to whole numbers (not decimals).

Real: A number field that can accommodate decimals.

String: An alphanumeric field that can store a maximum of 255 characters.

Text: An alphanumeric field that can store an unlimited number of characters.

Configuring user-defined fields

To configure a user-defined field:

1. Decide which data type field is necessary to use for the information you want to capture. For example, to configure a field that requires a yes/no answer, a Boolean data field should be used. However if the field is to be a free text note of unknown length, a text data field should be configured.

2. From the **Setup** menu select **Configure Application**.

Configure Application

Table Name △
Accessions
AccessionsLocations
AccessionsResources
ArchDescriptionAnalogInstances
ArchDescriptionInstances
ArchDescriptionNames
ArchDescriptionNotes
ArchDescriptionRepeatingData
ArchDescriptionSubjects
BibItems
Bibliography
ChronologyItems
ChronologyList
DatabaseFields
DatabaseTables
Deaccessions
DefaultValues
DigitalObjects
Events
ExternalReference
FileVersions
Index
IndexItems
ListDefinition
ListDefinitionItems

Done

3. Select the **Accessions** table.

Table Name Accessions

Fields

Field Name △	Field Label	Data Type	Return Screen Order
accessionDate	Accession Date	java.util.Date	0
accessionDispositionNote	Accession Disposition Note	java.lang.String	0
accessionId	Accession Id	java.lang.Long	0
accessionNumber	Accession Number		1
accessionNumber1	Accession Number1	java.lang.String	0
accessionNumber2	Accession Number2	java.lang.String	0
accessionNumber3	Accession Number3	java.lang.String	0
accessionNumber4	Accession Number4	java.lang.String	0
accessionProcessed	Accession Processed	java.lang.Boolean	0
accessionProcessedDate	Accession Processed Date	java.util.Date	0
accessRestrictions	Access Restrictions	java.lang.Boolean	0
accessRestrictionsNote	Access Restrictions Note	java.lang.String	0
acknowledgementDate	Acknowledgement Date	java.util.Date	0
acknowledgementSent	Acknowledgement Sent	java.lang.Boolean	0
acquisitionType	Acquisition Type	java.lang.String	0
agreementReceived	Agreement Received	java.lang.Boolean	0
agreementReceivedDate	Agreement Received Date	java.util.Date	0
agreementSent	Agreement Sent	java.lang.Boolean	0
agreementSentDate	Agreement Sent Date	java.util.Date	0
bulkDateBegin	Bulk Date Begin	java.lang.Integer	0
bulkDateEnd	Bulk Date End	java.lang.Integer	0
cataloged	Cataloged	java.lang.Boolean	0
catalogedDate	Cataloged Date	java.util.Date	0
catalogedNote	Cataloged Note	java.lang.String	0
conditionNote	Condition Note	java.lang.String	0
containerSummary	Container Summary	java.lang.String	0

First   Previous   Next   Last   Cancel   OK

4. Scroll down to the user-defined fields and select the data type determined in Step 1. For example, if a Boolean field was determined upon, select **userDefinedBoolean1**. The Toolkit provides at least two user-defined fields for each data type.

5. Change the **Field Label** to represent the information you want stored in the field.

Field Name   userDefinedBoolean1

Field Label   Yes/no User Defined Field

Data Type   java.lang.Boolean

☐ Include In Search Editor

Return Screen Order 0

Definition

Examples

First   Previous   Next   Last   Cancel   OK
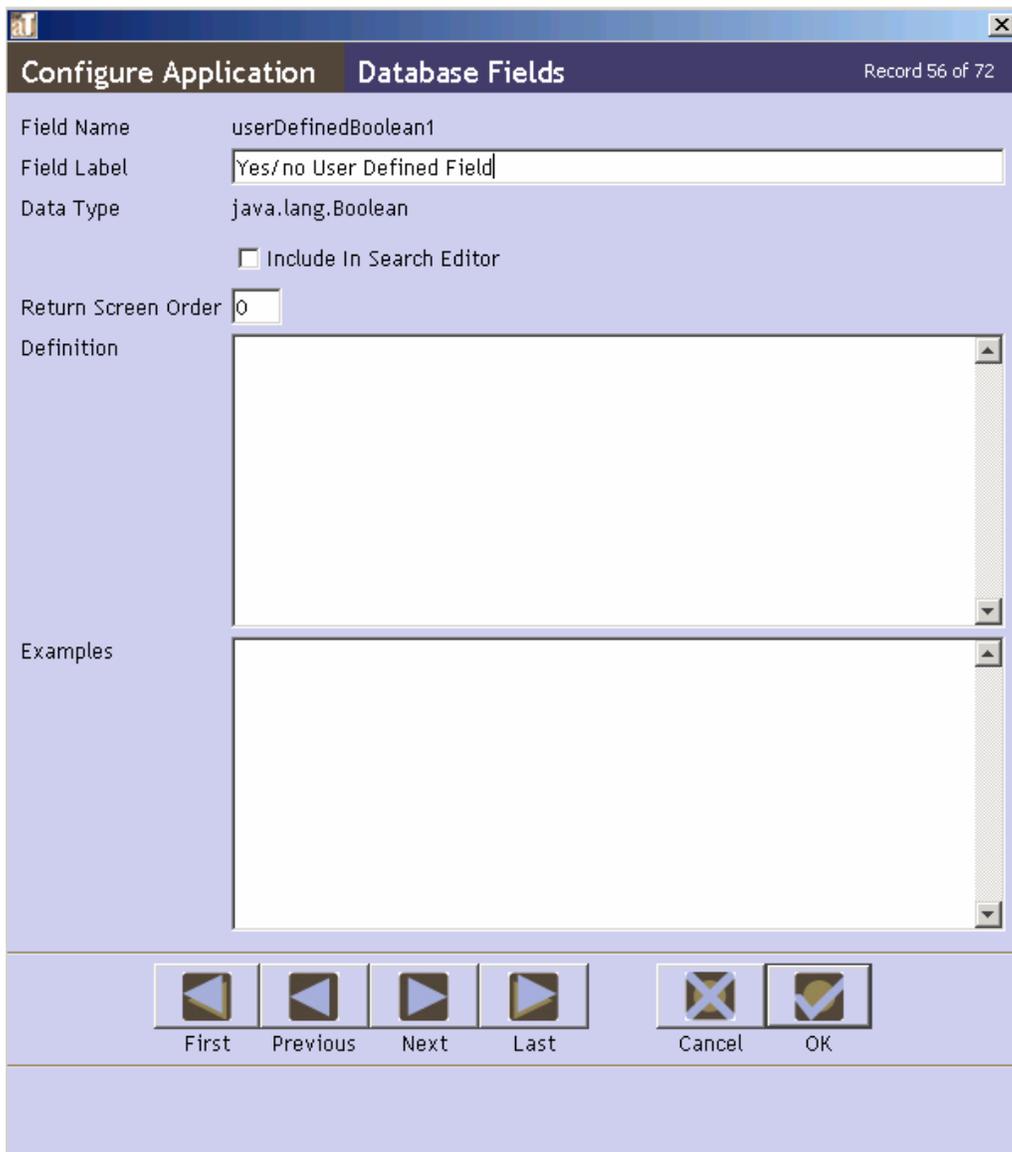
6. Check the **Include in Search Editor** box if the field is to be included in the **Search Editor** screen.

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

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.

8. Provide a **Definition** for the field. This definition will appear in the rollover tips.

9. Provide **Examples** of data entries for the field. These examples will appear in the rollover tips.

10. Press the [OK] button to save the new field.

Customizing reports

The Toolkit allows customized reports to be utilized, however customization of reports is not supported by the Toolkit. To create and generate reports, you must use the open-source application, JasperReports. JasperReports, which utilizes a complex report generating syntax, can be used on its own or in conjunction with iReports, another open-source application that provides a graphical user interface for designing JasperReports. You may use these applications to customize the Toolkit's reports or to create your own reports. You may also use other reporting applications designed to work the backend databases supported by the Toolkit. Instructions for creating such reports are out of scope for the Toolkit's user manual, but the JasperReports manual may be purchased at http://jasperforge.org/sf/projects/jasperreports and the iReports user manual is freely available at http://jasperforge.org/sf/projects/ireport. Those wishing to create or customize their own reports will also need to make use of the Toolkit's application programming interface (API), which is available on the Archivists' Toolkit web site.

To add a custom report to the drop-down list of available reports:

1. Place the report in the appropriate directory within the Reports folder located in the same folder as the Toolkit program files. For example, an accession report should be placed in the reports/Accessions directory.
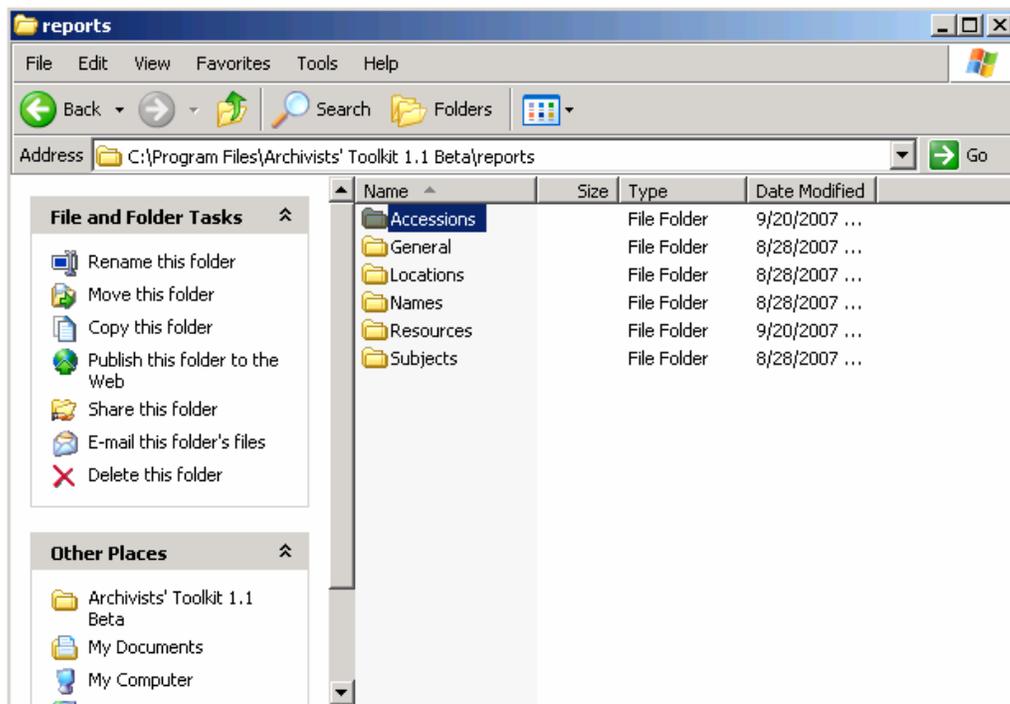
Note: The custom report will only be available in the local client in which it is placed. It will not appear in other clients within the repository unless these steps are repeated for each individual client.

2. If the application is open, close it and then relaunch it.

3. The report should now be available in the list of accession drop-down reports.
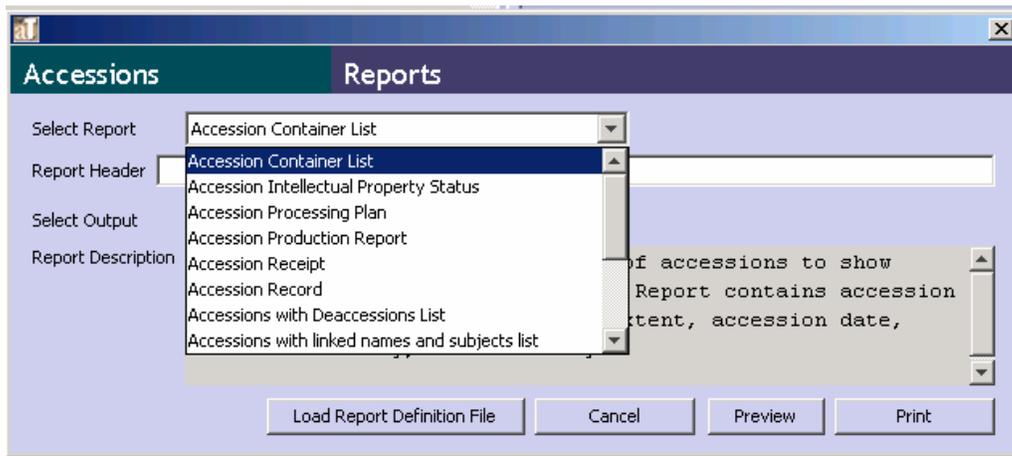
Note: The filename will appear as the report title in the **Select Report** drop-down list. To customize this and the **Report Description**, include the property names, as well as the desired values, of **reportTitle**, and **reportDescription** within the report.

To load a report into specific functional area for one-time processing:

1. Press the [Reports] button.

2. Select the [Load Report Definition File] button.

3. A file-picker window will appear, prompting for the report file to be chosen. Select the appropriate file and press **Open**.
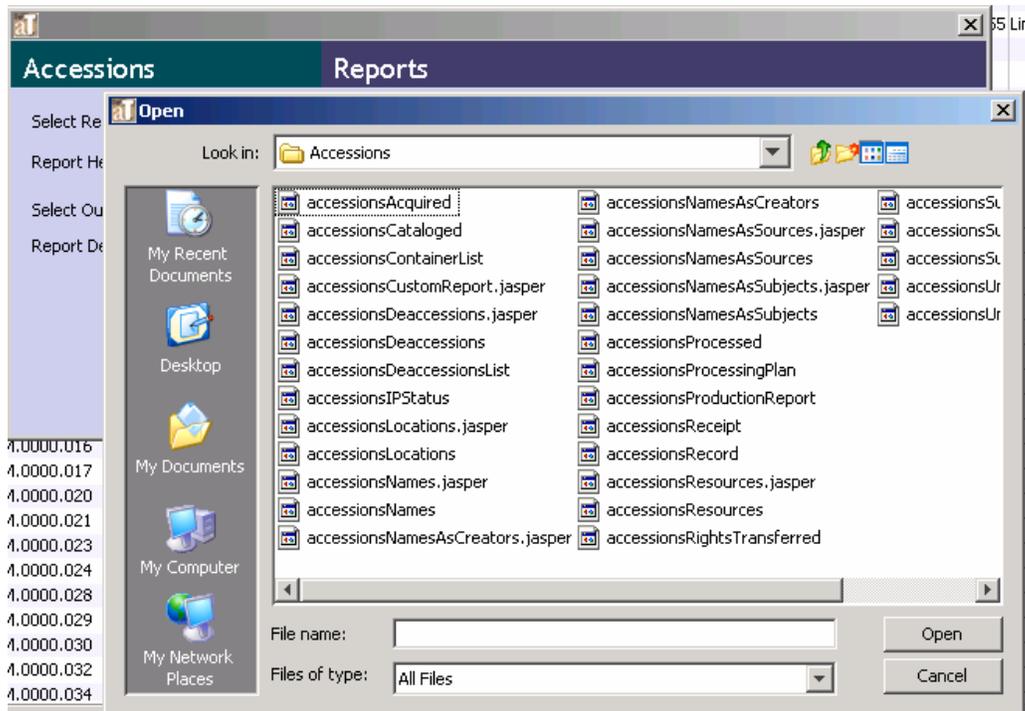
Note: The screen will not change after the report is loaded.

4. Input a **Report Header** if desired. Pick an output method from the **Select Output** drop-down list and click on **Preview** or **Print**.

Note: This process will not load the report into the application permanently and the report will not appear as an option in the **Select Report** drop-down list.