

New Features for AT Release 1.5

1. Improved searching

The search editor has been revised for both Accessions and Resources and is now divided between two tabs: Simple Search and Search by Linked Record.

Resource record search results now may include component-level matches for either the Simple Search or Search by Linked Record options. Components matching the query will be listed in the results sets, and the component, context for the match will be identified. Users can open the resource record to where the component match is located by simply double-clicking on the component in the results list.

Simple Search (Resources):

| | | | 2 |
|--|---------------|--------|----------|
| Resources | Search Editor | | |
| Simple Search Search By Linked Record | l] | | |
| Search resources: | | | |
| | | | |
| | | | |
| Select a field Begins w Select a field Begins w | | | and 💌 |
| Include components in search | | | |
| j include components in search | | | |
| | | Cancel | Search I |
| | | | |
| | | | |
| | | | |

Search by Linked Record (Resources):

| al | | | | × |
|---------------------------------------|---------------|--------|--------|----------|
| Resources | Search Editor | | | |
| Simple Search Search By Linked Record | | | | |
| Search by linked record: | | | | |
| Find by name | | Lookup | Clear | Function |
| Find by subject | | Lookup | Clear | |
| Find by location | | Lookup | Clear | |
| Find by deaccession date | - | | | |
| Find by Accession Number | | | | |
| Find by note text | | | | |
| Find by instance type | v | | | |
| 🔲 Include components in search | | | | |
| | | | Cancel | Search |

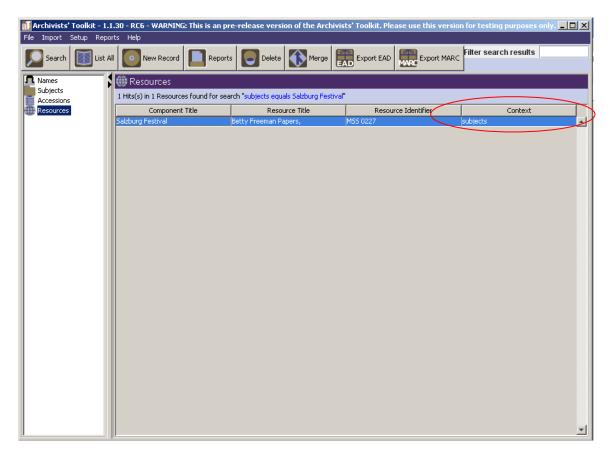
Below is an example of a Search by Linked Record, followed by the results of the search. The search term is 'Salzburg Festival', selecting through the button.

| esources | Subject Te | erm Lookup |
|-----------------------------|-----------------------|-------------------------------|
| Filter: | | |
| Subject Term | Туре | Source |
| Music United States 20t | 1 | Library of Congress Subject |
| Musicians as artists 20th | Topical Term (650) | Library of Congress Subject |
| Nuclear arms control | Topical Term (650) | Library of Congress Subject |
| Photographic prints 1986 | Genre / Form (655) | Thesaurus for Graphic Mate |
| Photographic prints 20th | Genre / Form (655) | Thesaurus for Graphic Mate |
| Physicists Biography | Topical Term (650) | Library of Congress Subject |
| Physics Study and teaching | Topical Term (650) | Library of Congress Subject |
| Plasma waves | Topical Term (650) | Library of Congress Subject |
| Publishers and publishing | Topical Term (650) | Library of Congress Subject |
| Purisima Concepcion de Lan | Geographic Name (651) | Library of Congress Subject |
| Querétaro (Mexico) | Geographic Name (651) | Library of Congress Subject |
| Rhode Island History 1 | Geographic Name (651) | Library of Congress Subject |
| Rhode Island History C | Geographic Name (651) | Library of Congress Subject |
| Salzburg Festival | Genre / Form (655) | Local sources |
| San Antonio del Dotor (Mexi | Geographic Name (651) | Library of Congress Subject |
| Sermons, English 18th ce | Topical Term (650) | Library of Congress Subject |
| Tonga Description and tra | Topical Term (650) | Library of Congress Subject |
| Tonga Social life and cust | Topical Term (650) | Library of Congress Subject |
| Warwick (R.I.) History | Geographic Name (651) | Library of Congress Subject 💽 |

The search may include components (note checked box next to 'Include components in search' at the bottom left-side of search editor).

| <u>au</u> | X |
|---------------------------------------|---------------------------------------|
| Resources | Search Editor |
| Simple Search Search By Linked Record | 1] |
| Search by linked record: | |
| Find by name | Lookup Clear Function 💌 |
| Find by subject Salzburg Festival | Lookup Clear |
| Find by location | Lookup Clear |
| Find by deaccession date | · · · · · · · · · · · · · · · · · · · |
| Find by Accession Number | |
| Find by note text | |
| Find by instance type | Y |
| Include components in search | |
| | Cancel Search |

Note that the context of search match appears in result set:



Double-click on the search result and the Resource record is opened at the component that contains 'Salzburg Festival'.

| | × |
|--|--|
| Resources | Record 1 of 1 |
| Title: Betty Freeman Papers, MS5 0227: Betty Freeman Papers, Accession Processed in 1993 Accessions Processed in 1996 Accessions Processed in 1996 Accessions Processed in 1996 Accessions Processed in 1998 Accession Processed in 1998 Accession Processed in 2001 Accession Processed in 2001 B: CORRESPONDENCE AND SUBJECT FILES B: Glyndebourne Festival B: Miscellaneous B: MISCELSCORES B: MISCELSCORES B: MISCELSCORES B: MISICAL SCORES B: MISICAL SCORES | Resource Identifier: MSS 0227 Basic Description Names & Subjects Notes Etc. Level subseries Persistent ID ref867 Other Level Extent Extent Salzburg Festival Container Summary Container Summary |
| CORDINGS ACTWORKS AND POSTERS ACTWORKS AND POSTERS ACTWORKS AND POSTERS ACTWORKS AND POSTERS | Wrap in tag Date Expression Date Date Begin Date End Bulk Date Begin Bulk Date End Language Code Repository Processing Note Add Instance Remove Instance Internal Only Restrictions Apply |
| Add Sibling Select an | Delete Transfer Manage Export Export Component Transfer Cont. Locations EAD MARC |
| | irst Previous Next Last Reports Close Save |
| Created: Nov 5, 2008 by a2ross Modified: Nov 1 | 0, 2008 by a2ross Record Number: 5 |

2. Support for combining resource records

Two or more resource records can be brought together into a single record using the

Transfer option (in post-AT1.1 beta releases it was called the Resource List Screen or using the. "Extract Comp.") from within a resource record. With appropriate planning for processing projects, these features will enable multi-staff to describe simultaneously different parts of the same resource. The parts can then be united, using either of these two features, in a final resource description.

Please note that the Merge and Transfer features are new tools subjected only to limited testing. We strongly remind you that 1) data should always be backed up before using these tools and 2) results should be checked immediately and thoroughly after using the tools. Please report any problems through the internal bug reporting function or by email to info@archiviststoolkit.org

function, the record that is merged into When two resource records are combined using the another record (not highlighted) will be deleted; the data it contained will become part of the record into which it was merged.

When two resource records are combined using the function, the components are transferred to the other resource record and deleted from the resource to which they had belonged. The top level resource record from which the components are transferred will remain after the transfer is completed.

a. **Merg**e

Similar to the name and subject merge function, when merging resource records, select two or more

records and click the on the

| e Import Setup | Reports Help | | | | | |
|------------------------|-------------------------------|----------------|-------------|--------------------|---------------------|--|
| Search | List All ONew Record | Reports Delete | Merge | D Export MARC | r search results | |
| Names | 💮 Resources | | | | | |
| Subjects Accessions | 11 Record(s) found for search | "list all" | | | | |
| Resources | Title | Extent Number | Resource Id | Extent Measurement | Resource Identifier | |
| | Pablo Macedo Collection of | 0.4 | 1 | 0 Linear feet | MSS 0035 | |
| | Dennis Phillips Papers, | 14.25 | | 1 Linear feet | MSS 0223 | |
| | Sun & Moon Press Archive, | 108.2 | | 2 Linear feet | MSS 0224 | |
| | Hannes Alfven Papers, | 12 | | 3 Linear feet | MSS 0225 | |
| | Harvey Itano Papers, | 3.8 | | 4 Linear feet | MSS 0226 | |
| | Betty Freeman Papers, | 28.3 | | 5 Linear feet | MSS 0227 | |
| | Millerd Family Documents, | 0.4 | | 6 Linear feet | MSS 0228 | |
| | Richard Rubenstein Papers, | 0.4 | | 7 Linear feet | MSS 0229 | |
| | Dr. Seuss Collection, | 197.7 | | 8 Linear feet | MSS 0230 | |
| | J. Edward Hoffmeister Pap | 4 | | 9 Linear feet | MSS 0231 | |
| | Ellen C. Barrett. Sonora: A | | 1 | 1 | MSS 0335 | |

button.

Next, you are prompted to select which record to merge into.





Merge

option in

| Title | Extent Num | Resource Id | Extent Mea | Resource I |
|---------------------------|------------|-------------|-------------|------------|
| ennis Phillips Papers, | 14.25 | | Linear feet | MSS 0223 |
| iun & Moon Press Archive, | 108.2 | 2 | Linear feet | MSS 0224 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

It should be noted that all of the components, excluding only the top level resource record, of the resource to be merged will be appended to the resource targeted to receive the data. The top level resource record of the items being merged will not be moved and will be deleted upon completion of the merge. **This cannot be undone, except by restoring a backed-up version of the database.** After selecting the record to merge into, a message is displayed to verify that the user does want to merge the records as indicated.

| Merge | × |
|-------|---|
| ? | Are you sure you want to merge 1 resource(s) into MSS 0224: Sun & Moon Press Archive,? This will delete the other resource(s) including all top-level information. |
| | Yes No |

b. Transfer

The Transfer function (in beta releases called "Extract Comp.") is available from within a resource record and serves the same basic function of the merge option. The most notable difference is that the resource record from which the components are transferred remains in the database.



Clicking on the button brings up a window where resource records can be browsed and one or more can be selected for transferring their components to the open resource record.

| esources | | | | | Re | ecord 9 of |
|---|--|---|-----------------|-----------------------------|---------------------|------------|
| Title: Sun & Moon Press Archive, | | | | Res | ource Identifier: | MSS 02 |
| MSS 0224: Sun & Moon Press Archive, 📃 🔼 | Basic Description Names & Subjects 1 | Notes Etc. & Deacc | essions Finding | Aid Data | | |
| Contract Accession Processed in 1993 Contract Accession Processed in 1996 | Level collection | | Pacourco | Resource Identifier MSS 022 | | |
| Content of the second | | | | identifier (iws3.022) | | |
| ACCESSION FLOCESSED IN 2004 | Other Level | | Accessio | ns linked to this Reso | urce ID: | |
| | Title | | Acc | ession Number 🛆 | Accession Title | |
| | Sun & Moon Press Archive, | | | | | |
| | Wrap in tag 💌 | al Resources | | Lookup Resourc | e. | 2 |
| | Date Expression 1976-2002 Inclusive Dates | Double click on a Re Or hit enter if a Res | | | | |
| | Begin 1976 End 2 | Title | Extent Number | Resource Id Extent M | leasur Resource Ide | en |
| | Bulk Dates | Aqui estamos y | 0.4 | 12 Linear fe | | |
| | Begin End | item title | 7 | 13 Cubic fee | | |
| | | Title of the file | 0.7 | 11 Linear fe | | |
| | Language English (eng) | Carl Leavitt Hu John W. Hilton, | 223 | 10 Linear fe 4 Linear fe | | |
| | | Gennaro Tisi Pa | 23.2 | 1 Linear fe | | |
| | Repository Processing Note | South Seas Mar | 0.1 | 3 Linear fe | | |
| | | Dennis Phillips P | 14.25 | 14 Linear fe | | |
| | | Sun & Moon Pr | 108.2 | 15 Linear fe | et MSS 0224 | |
| | | Hannes Alfven | 12 | 16 Linear fe | et MSS 0225 | |
| | Repository AT | Harvey Itano P | 3.8 | 17 Linear fe | et MSS 0226 | |
| | | Betty Freeman | 28.3 | 18 Linear fe | | |
| * | Change Rep | Millerd Family D | 0.4 | 19 Linear fe | | |
| | | Richard Rubens | 0.4 | 20 Linear fe | | |
| Add Sibling Select an RDE | Delete | Dr. Seuss Colle | 197.7 | 21 Linear fe | | |
| Child Sibling | 🔟 🔝 Component 🛛 🛶 🖙 | | 4 | 22 Linear fe | | |
| | | Carl Rakosi Pap | 6.5 | 5 Linear fe | | |
| | | Ben Yellen / Ch | 0.2 | 9 Linear fe | | * |
| | First Previous Next Last | Bruno Zimm Pa Filter: | 7.6 | 2 Linear fe | et MSS 0675 | |

After these are selected, a message is displayed to verify that the user does want to transfer the records. As with the merge function, **this cannot be undone**, **except by restoring the backed-up database**.

| Transfer | | × |
|----------|---|---|
| 🕐 Are y | you sure you want to transfer all components from MSS 0162: South Seas Marine Products, Book of snap: | shots,? This can't be undone and the current resource record will be saved. |
| | Yes No | |

If Yes is selected all of the components from the selected resources are pulled into the main resource

-41-

| record (from where "Transfer" was clicked). Unlike the | nction, the | |
|--|-------------|---|
| components function does not delete the top level resource record from | | • |

3. Customizable Rapid Data Entry screen

Rapid Data Entry screens are devices intended to accelerate data entry by letting elements of two or more data entry templates be configured into a single template best reflecting the nature of the data entry being done. This can minimize toggling across multiple data entry screens. Users may define multiple Rapid Data Entry Screens and invoke each one at the appropriate time during data entry.

Rapid Data Entry screen customization is accessible through the Setup menu options:



Selecting 'Configure Rapid Data Entry Screens' opens the 'Edit RDE Entry Screens' window:

| | Edit Rapid Dat | a Entry Screens | l |
|---------|-----------------|-----------------|------|
| | Rde Screen Name | User | |
| Default | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | Add Record | Remove Records | Done |
| | | | |

| | | | | × |
|---|---------------------|-----------|--|---|
| Administration | Rapid Data Entry | Screen | | |
| Rde Screen Name | | | | |
| Items to pick from | | | Items picked | |
| Analog instance | | Add -> | Screen Label | |
| Bulk dates Component Unique Identifier | | Remove | | |
| Container Summary | | Move Up | | |
| Date Expression Digital instance | | | | |
| Extent | | Move Down | | |
| Inclusive dates | | | | |
| Internal Only Language Code | | | | |
| Level | | | | |
| Name link Note | | | | |
| Other Level | | | | |
| Repository Processing Note | | | | |
| Subject link Title | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | Dealle altitute est altitute est actives | |
| | | | Double click to set stickiness options | |
| | | | 🗙 💌 😻 | |
| | First Previous Next | Last | Cancel OK + 1 | |
| | | | | |
| | | | | |

Provide a name for the custom RDE screen. Next, click on the fields desired for the RDE and then on Add to put them on the RDE. You can change the vertical sequence of the field list by highlighting a field name and clicking on the 'Move Up' and 'Move Down' buttons.

| <u>al</u> | | | X |
|---|---------------------|--|--|
| Administration | Rapid Data Entry ! | 5creen | |
| Administration Rde Screen Name Dr. Seus: Items to pick from Analog instance Bulk dates Component Unique Identifier Container Summary Date Expression Digital instance Extent Inclusive dates Internal Only Language Code Revel Name link Note Other Level Repository Processing Note Subject link Title | Rapid Data Entry S | Add -> Remove Move Up Move Down | Items picked Title Level Bulk Dates Container Summary Date Expression Extent Language Code Repository Processing Note Subjects |
| | First Previous Next | Last | Cancel OK +1 |
| | FILST PREVIOUS NEXT | Last | |
| | | | |

The newly created custom RDE screen(s) will now appear in the drop-down selection in a Resource record. You may configure as many custom RDE screens as desired.

| | | X |
|--------------------------------------|--|---|
| Resources | | |
| Title: | | Resource Identifier: |
| • | Basic Description Names & Subjects Notes Etc. & Deaccessio | |
| | Level collection 💌 | Resource Identifier 6020 |
| | Other Level | Accessions linked to this Resource ID: |
| | Title | Accession Number 🔺 Accession Title |
| | Dr. Seuss Papers | |
| | | - |
| | Wrap in tag 🔻 | · · · · · · · · · · · · · · · · · · · |
| | | Extent Extent Number 3 Cubic feet |
| | Date Expression 1960-2000 | |
| | Begin End | Container Summary Many photographs and papers |
| | Bulk Dates | Many photographs and papers |
| | Begin End | |
| | | Instances |
| | Language English (eng) | Instance Type 🔺 Instance Label |
| | Repository Processing Note | |
| | <u> </u> | • |
| | | Add Instance Remove Instance |
| | Repository AT | |
| | Change Repository | 🗖 Internal Only 🛛 🗖 Restrictions Apply |
| Add Child Sibling Select an RDE | Delete Extract Manage Component Comp. Decations | Export Export Export Cont. Labels |
| Default Dr. Seuss Papers First | Previous Next Last Reports Close | Save +1 |
| | Previous Next Last Reports Close | 5470 . 1 |
| | | |
| | | |

Selecting the 'Dr. Seuss Papers' in this example, the RDE screen will include only those fields selected in customization setup for that RDE screen and the fields will appear in the order selected and saved.

| al | |
|--|---|
| Resources | Rapid Data Entry |
| Control-click on a label to make it sticky | or unsticky. Sticky fields will appear in red |
| Title | |
| Level | |
| Inclusive Dates Begin End | |
| Container Summary | |
| Date Expression | |
| Extent Number Extent Measure | |
| Language Code | |
| Repository Processing Note | |
| Subjects | |
| | Subject |
| | |
| | _ |
| | Cancel OK + 1 |

Selecting 'default' RDE from a Resource record will open the default RDE screen:

| Resources Rapid Data Entry |
|--|
| Control-click on a label to make it sticky or unsticky. Sticky fields will appear in red |
| Level |
| Internal Only |
| Restrictions Apply |
| Title |
| |
| |
| Container Summary |
| |
| |
| Date Expression |
| Inclusive Dates Begin End |
| Extent Number Extent Measurement |
| |
| Note Content Internal only |
| |
| |
| |
| Note Timernal only |
| |
| |
| |
| Note Difference Differ |
| |
| |
| |
| Instance Type |
| Container 1 Type Container 1 Numeric Indicator Container 1 Alphanumeric Indicator |
| Container 2 Type Container 2 Numeric Indicator Container 2 Alphanumeric Indicator |
| Container 3 Type Container 3 Numeric Indicator Container 3 Alphanumeric Indicator |
| Container Barcode |
| |
| Cancel OK +1 |

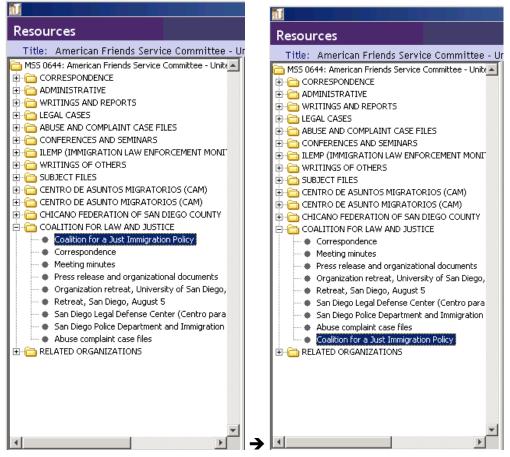
On any RDE screen, fields can be made 'sticky' or 'unsticky' by clicking on 'Ctrl' and the field name. The field label will appear in red if it is a sticky value. A field configured to be sticky means data entered into will be carried over to the next record created using the RDE.

To remove the 'sticky' value, click on 'Ctrl' and the field name again.

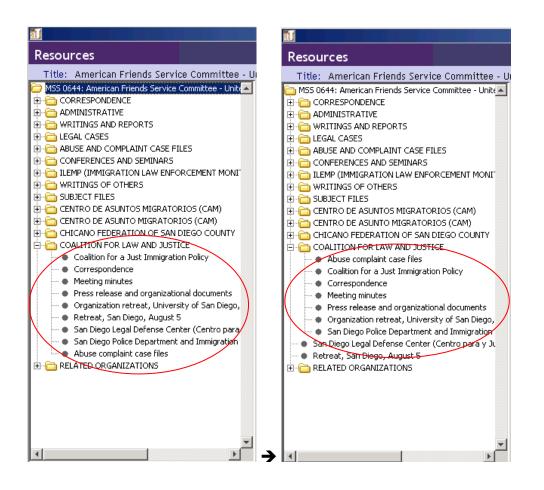
Sticky values override any default value specified for the field. However, sticky values are in effect only during the session in which they are being used. Closing the resource record closes the session, and the values that were set to be sticky no longer are. Default values, if specified, will become functional.

4. Improved drag & drop (rearrangement) tool

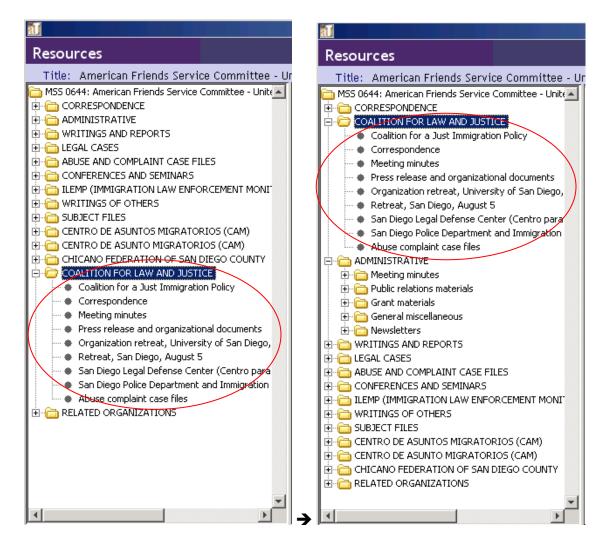
• A component can be moved to the end of a group of components.



• Components can be re-arranged, with all associated children, within the same level and at any level of the hierarchy.



• Can promote a component and all of its children to any level up to level 2, including the ability to place the component between two components, both of which may have children.



- Can demote a component and all of its children and the demoted component remains at the same level.
- A component does not need to have at least one child for another component to be dropped into it as a child.
- Scrolling in the complete hierarchical component window is possible when using the drag and drop feature as well.

5. Improved import / export logs

Import/export logs include options to print or save the log file. In addition the import log provides information on mandatory fields and items added to lookup lists.

| 5ummary | | A |
|---------------|-------------------------------------|----------|
| | | |
| fime to Impor | t Record: 10.35 sec | |
| Fitle of Impo | rted Record: Conrad Limbaugh Papers | |
| [tems added t | o lookup lists: | |
| cocmb ddded o | | |
| Exten | t type | |
| | VHS tape dub | |
| | digital betacam tape | |
| | film | |
| | fodler | |
| | folder | |
| | folders | |
| | foldler | |
| | legal size folder | |
| | legal sized folder | |
| | oversize folder | |
| | reel | |
| | reel audio tape | |
| | | - |

6. Reloading reports

When changing a report or adding a new report, you no longer need to close the application and reopen in order to run a report. Under the Reports menu, select Reload Reports form the drop-down menu.



Reload Reports will reload any new or modified reports without having to close and reopen the AT application.

7. Intermittent "Save"



function has been added throughout the application. Please note that by closing

a record with the Close button (or by clicking close window x on top right of window) prompts a popup window to appear asking whether you want to save the changes before exiting. This message appears whether or not any changes have been since the last 'save' or since opening the record without making any changes.

| Select an Optio | n | 2 | < |
|-----------------|-------------------|--------------|---|
| 😲 Do you | ı want to save yo | our changes? | |
| Yes | No | Cancel | |

8. Enhanced date format settings

Version 1.5 of the AT offers 12 date formats including international date formats D/M/YYY. D/M/YY, D-M-YYY, and D-M/YY.

9. Support for Java 1.6

The new release, AT1.5 supports Java 1.6, in addition to Java 1.5.