



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.

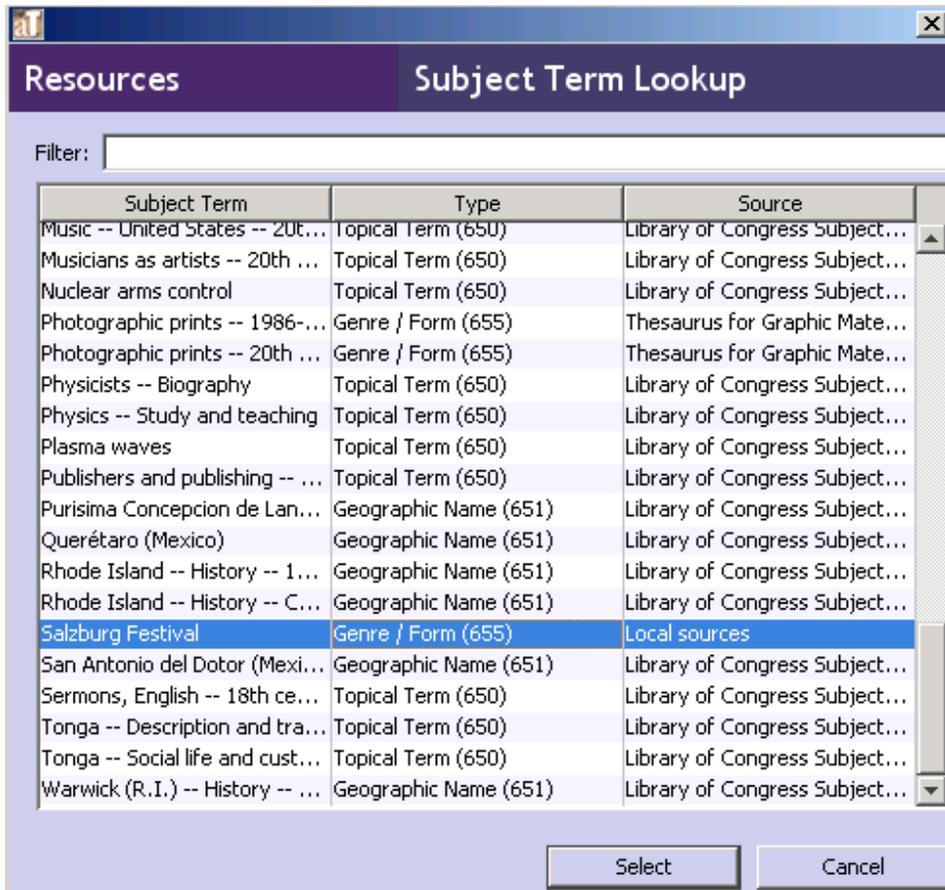
Simple Search (Resources):

The screenshot shows a window titled "Resources Search Editor" with two tabs: "Simple Search" (selected) and "Search By Linked Record". The interface includes a "Search resources:" label, two dropdown menus for "Select a field", two "Begins with" dropdown menus, and a text input field. An "and" dropdown menu is positioned between the two text input fields. Below these fields is a checkbox labeled "Include components in search". At the bottom right are "Cancel" and "Search" buttons.

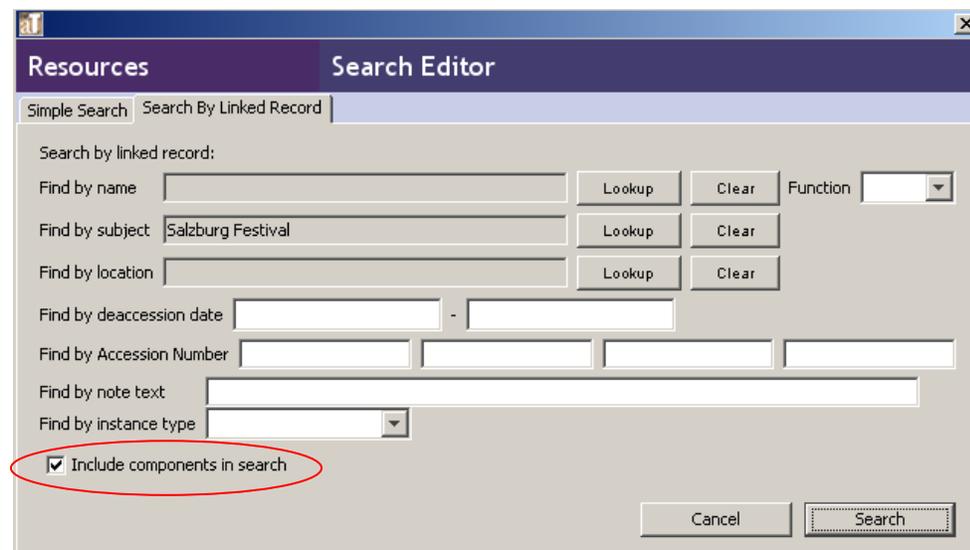
Search by Linked Record (Resources):

The screenshot shows a window titled "Resources Search Editor" with two tabs: "Simple Search" and "Search By Linked Record" (selected). The interface includes a "Search by linked record:" label and several search criteria: "Find by name", "Find by subject", "Find by location", "Find by deaccession date" (with a date range input), "Find by Accession Number" (with a multi-part input), "Find by note text", and "Find by instance type" (with a dropdown menu). Each criterion has a "Lookup" and "Clear" button. A "Function" dropdown menu is located to the right of the "Find by name" field. At the bottom right are "Cancel" and "Search" buttons. A checkbox labeled "Include components in search" is located at the bottom left.

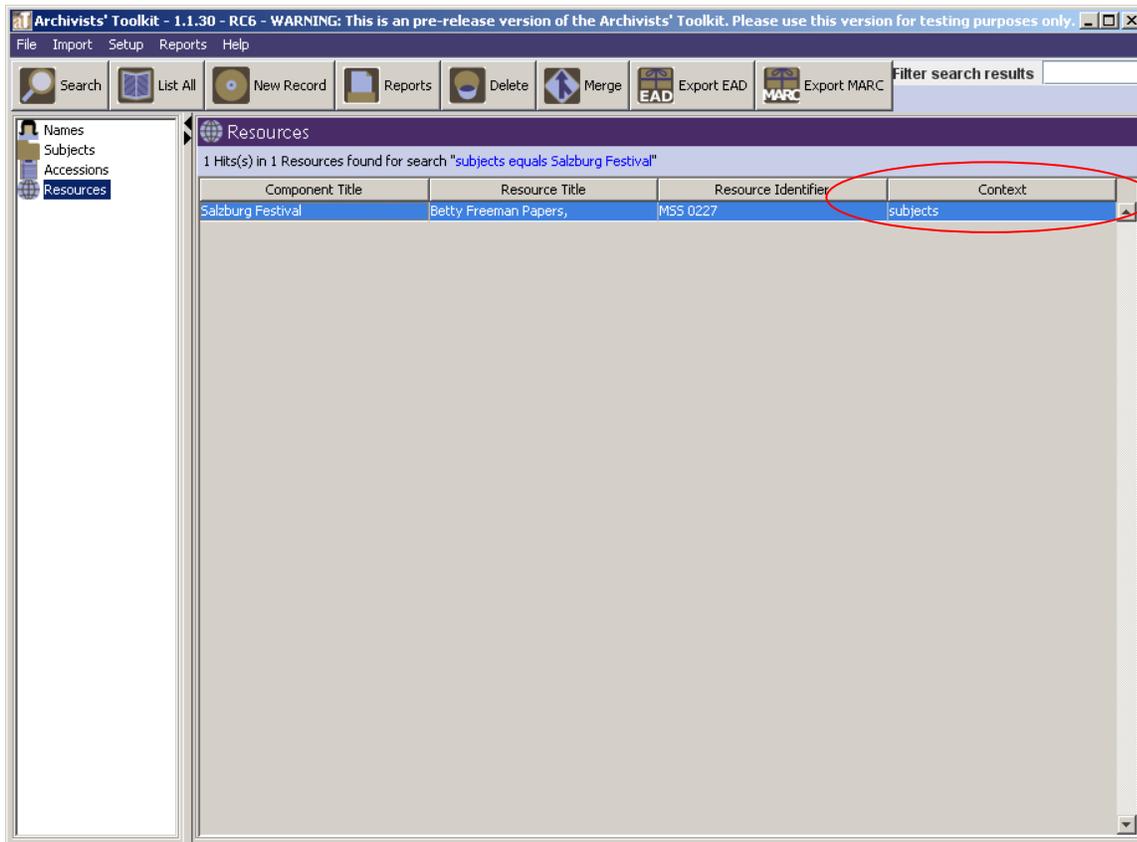
Below is an example of a Search by Linked Record, followed by the results of the search. The search term is 'Salzburg Festival', selecting through the  button.



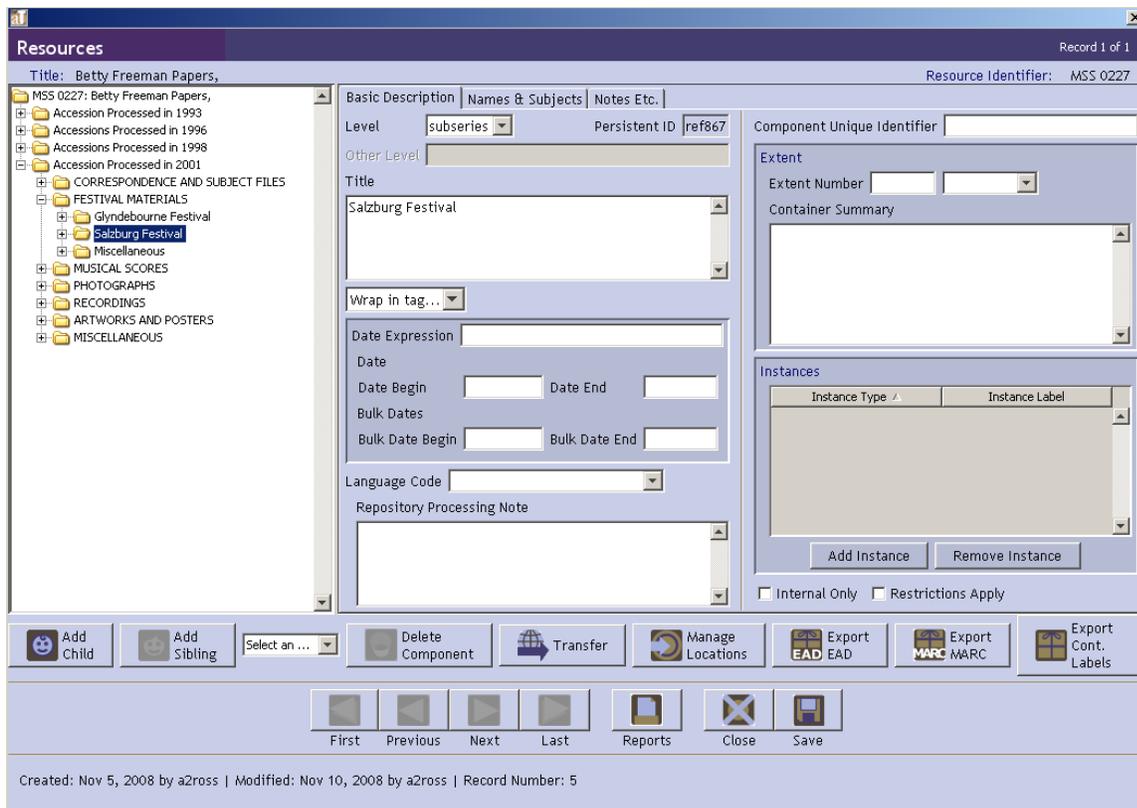
The search may include components (note checked box next to 'Include components in search' at the bottom left-side of search editor).



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'.



2. Support for combining resource records

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

the Resource List Screen or using the  option (in post-AT1.1 beta releases it was called “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

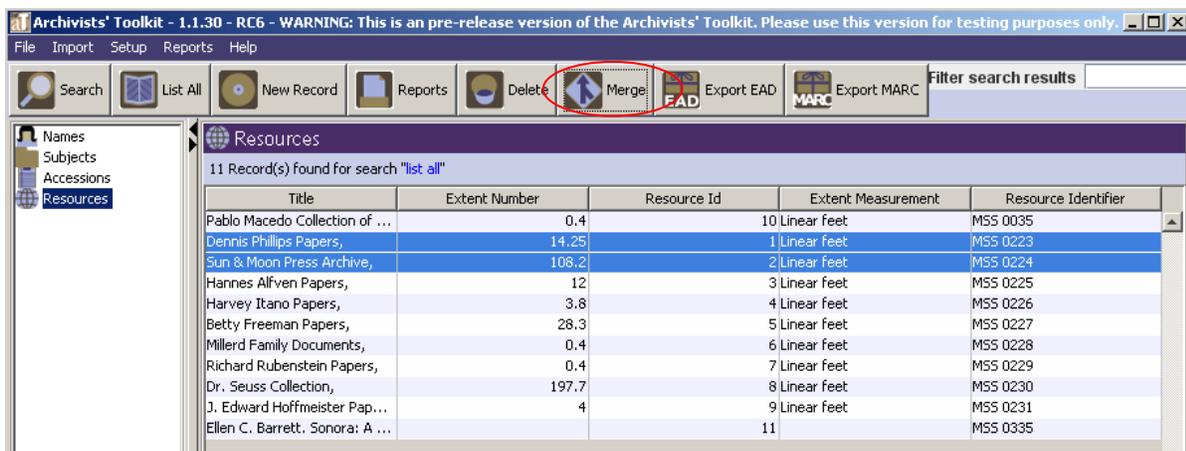
When two resource records are combined using the  function, the record that is merged into another record (not highlighted) will be deleted; the data it contained will become part of the record into which it was merged.

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. Merge

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

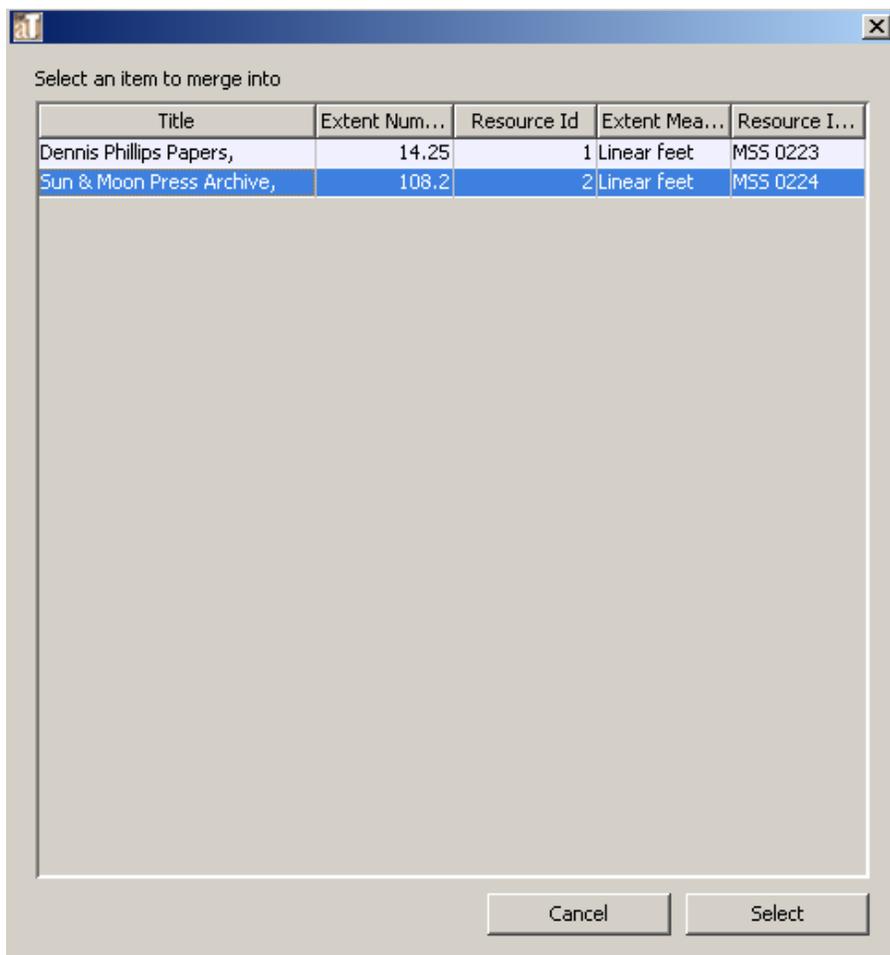
records and click the on the  button.



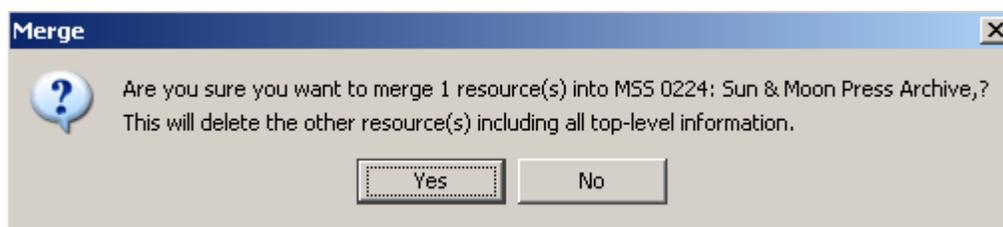
The screenshot shows the Archivists' Toolkit interface. The title bar reads "Archivists' Toolkit - 1.1.30 - RC6 - WARNING: This is an pre-release version of the Archivists' Toolkit. Please use this version for testing purposes only." The menu bar includes "File", "Import", "Setup", "Reports", and "Help". The toolbar contains icons for "Search", "List All", "New Record", "Reports", "Delete", "Merge" (circled in red), "Export EAD", and "Export MARC". A "Filter search results" input field is on the right. The left sidebar shows "Names", "Subjects", "Accessions", and "Resources" (selected). The main area displays a table of resources with 11 records found for the search "list all".

Title	Extent Number	Resource Id	Extent Measurement	Resource Identifier
Pablo Macedo Collection of ...	0.4	10	Linear feet	M55 0035
Dennis Phillips Papers,	14.25	1	Linear feet	M55 0223
Sun & Moon Press Archive,	108.2	2	Linear feet	M55 0224
Hannes Alfven Papers,	12	3	Linear feet	M55 0225
Harvey Itano Papers,	3.8	4	Linear feet	M55 0226
Betty Freeman Papers,	28.3	5	Linear feet	M55 0227
Millerd Family Documents,	0.4	6	Linear feet	M55 0228
Richard Rubenstein Papers,	0.4	7	Linear feet	M55 0229
Dr. Seuss Collection,	197.7	8	Linear feet	M55 0230
J. Edward Hoffmeister Pap...	4	9	Linear feet	M55 0231
Ellen C. Barrett. Sonora: A ...		11		M55 0335

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



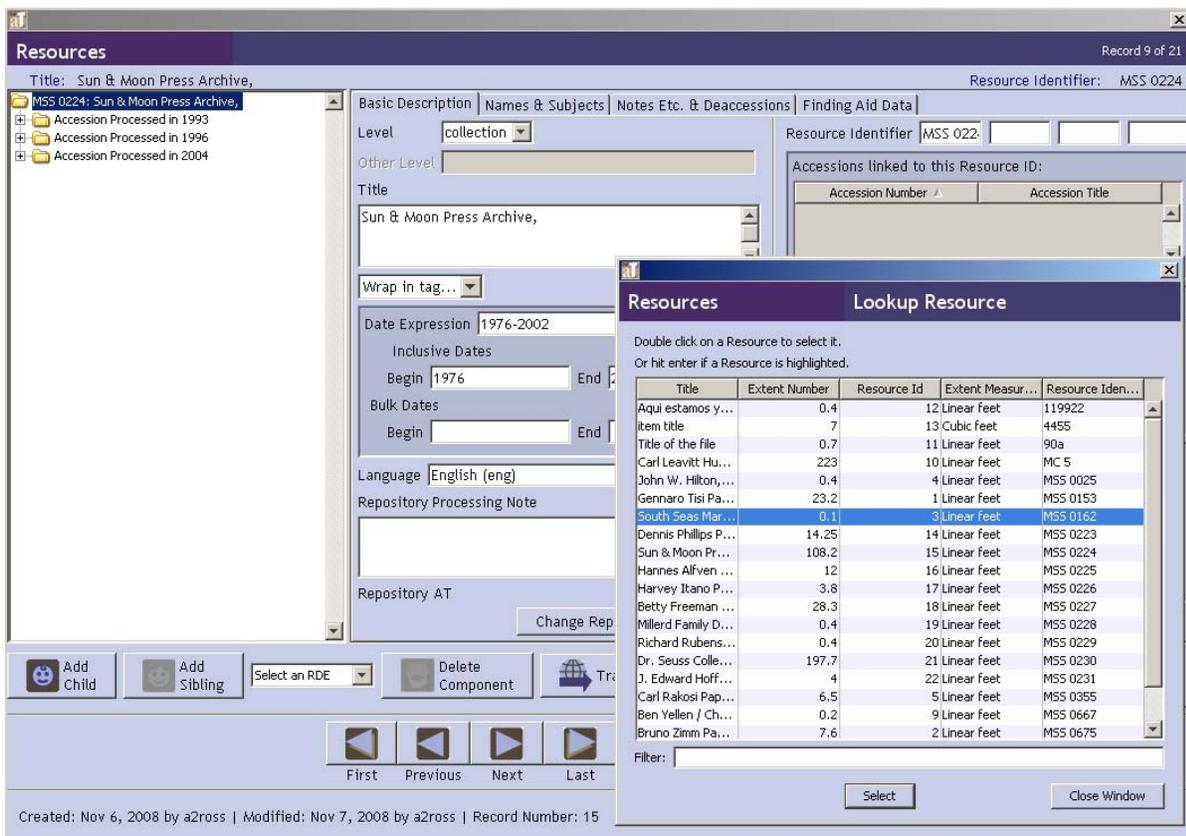
It should be noted that all of the components, excluding only the top level resource record, of the resource to be merged will be appended to the resource targeted to receive the data. The top level resource record of the items being merged will not be moved and will be deleted upon completion of the 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.



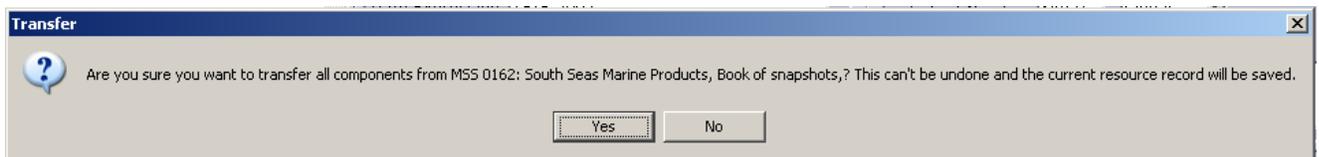
b. Transfer

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.



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.**

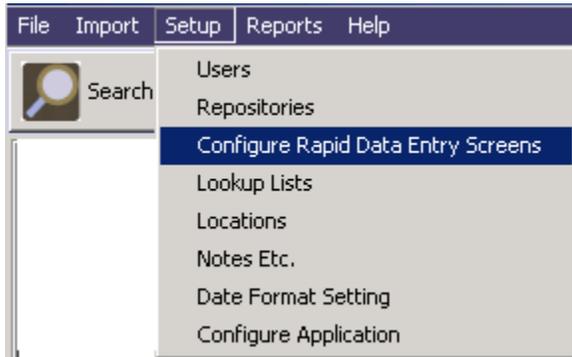


If **Yes** is selected all of the components from the selected resources are pulled into the main resource record (from where “Transfer” was clicked). Unlike the  Merge function, the  Transfer components function does not delete the top level resource record from which components are taken.

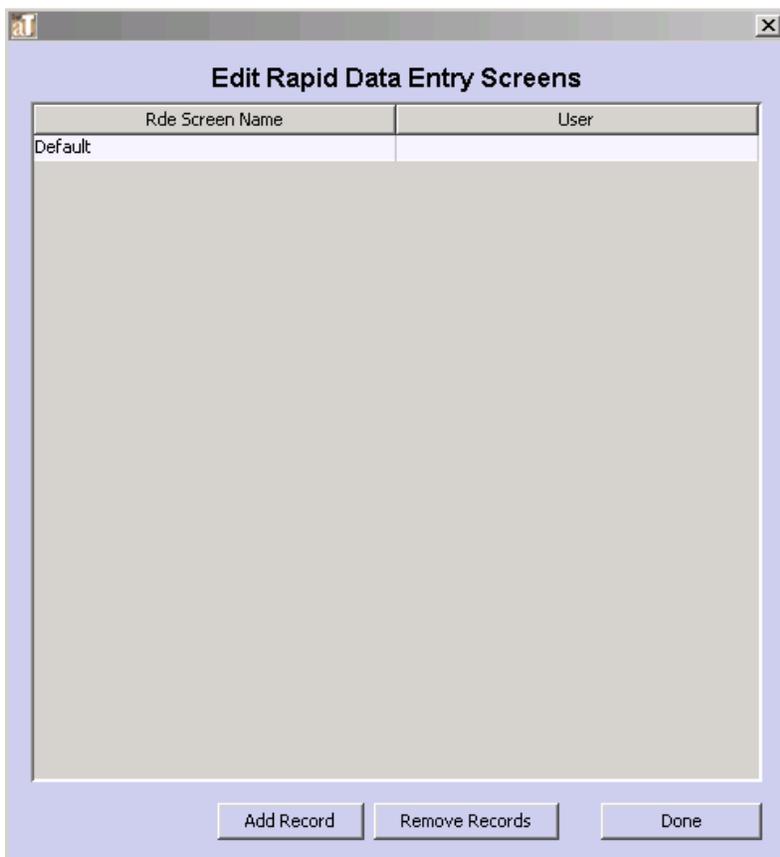
3. Customizable Rapid Data Entry screen

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.

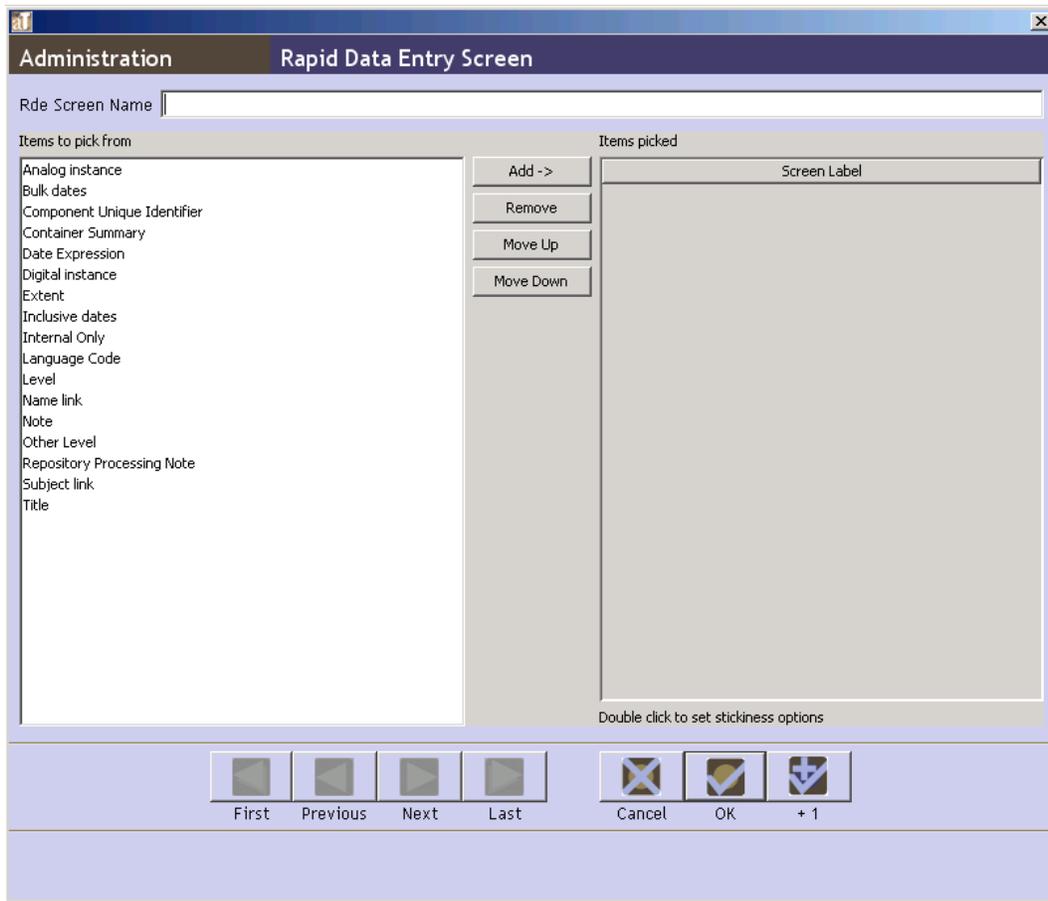
Rapid Data Entry screen customization is accessible through the Setup menu options:



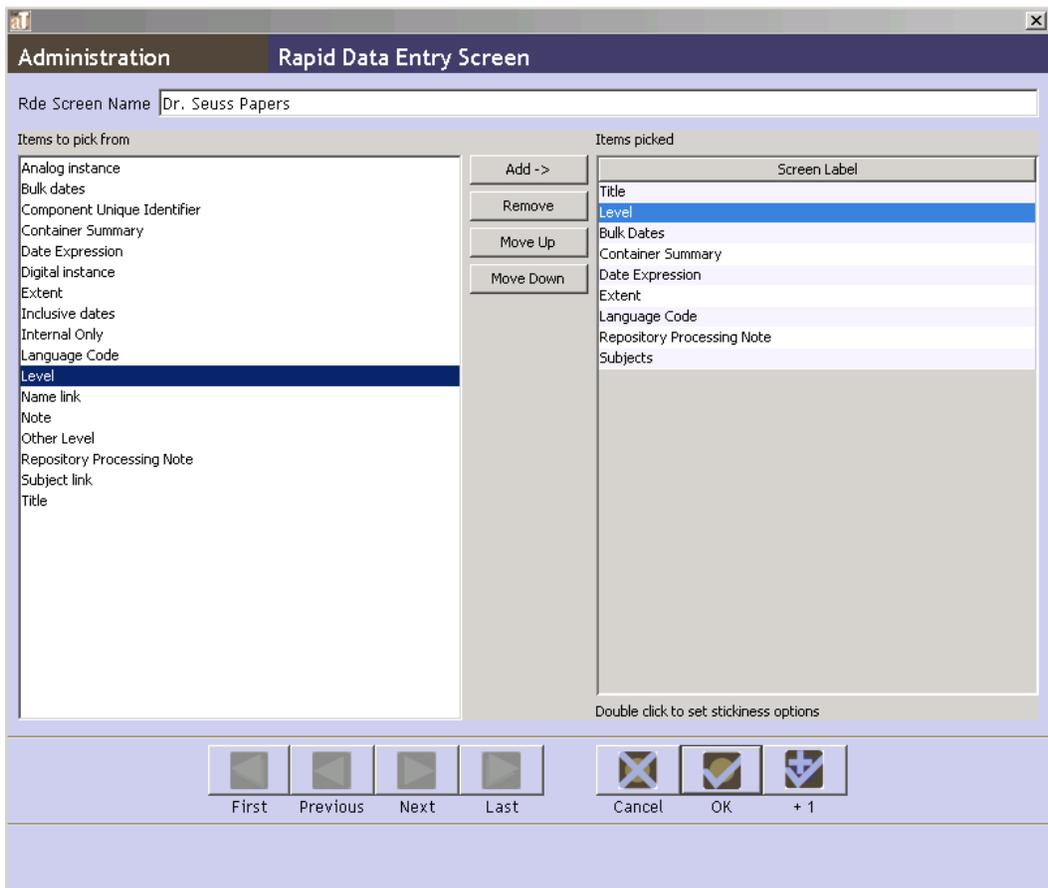
Selecting 'Configure Rapid Data Entry Screens' opens the 'Edit RDE Entry Screens' window:



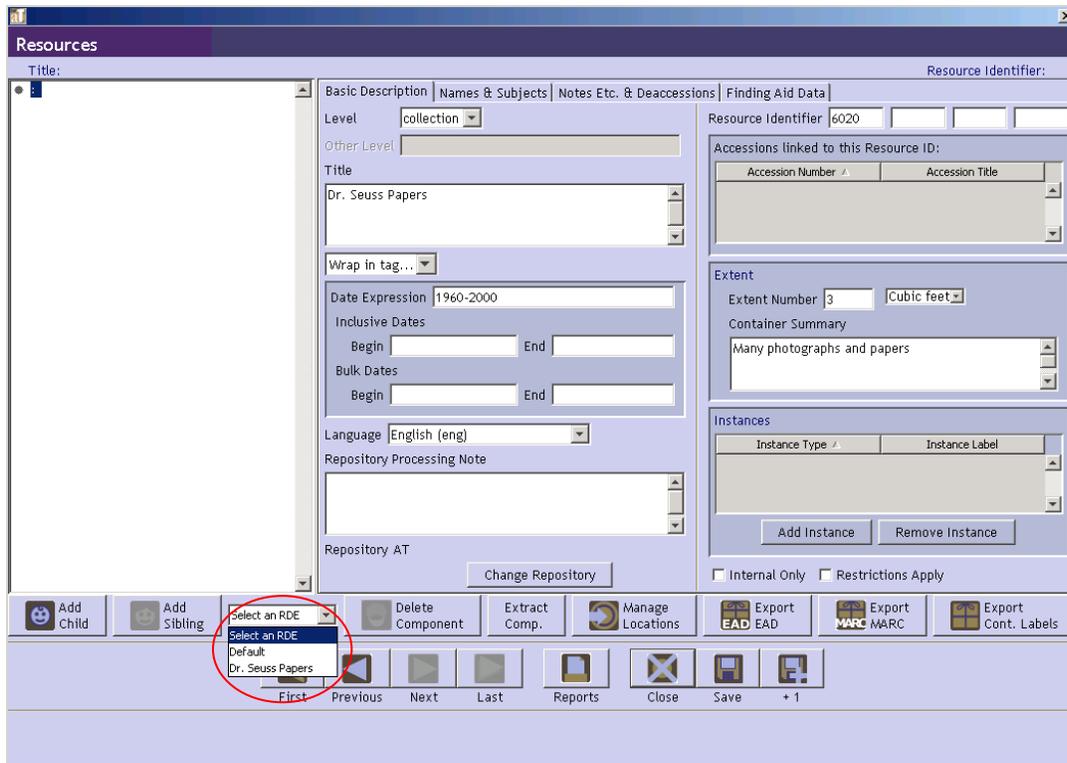
Select  to configure a custom RDE screen:



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.



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.



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.

The screenshot shows a software window titled "Resources" with a sub-header "Rapid Data Entry". Below the header, there is a note: "Control-click on a label to make it sticky or unsticky. Sticky fields will appear in red". The main area contains several input fields and controls:

- Title:** A large empty text box.
- Level:** A dropdown menu.
- Inclusive Dates:** Two text boxes labeled "Begin" and "End".
- Container Summary:** A large empty text box.
- Date Expression:** A text box.
- Extent Number:** A text box.
- Extent Measurement:** A dropdown menu.
- Language Code:** A dropdown menu.
- Repository Processing Note:** A large empty text box.
- Subjects:** A table with one column labeled "Subject".

At the bottom of the window, there are three buttons: "Cancel" (with a close icon), "OK" (with a checkmark icon), and "+ 1" (with a plus icon).

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 Internal only

Note Internal only

Note Internal only

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

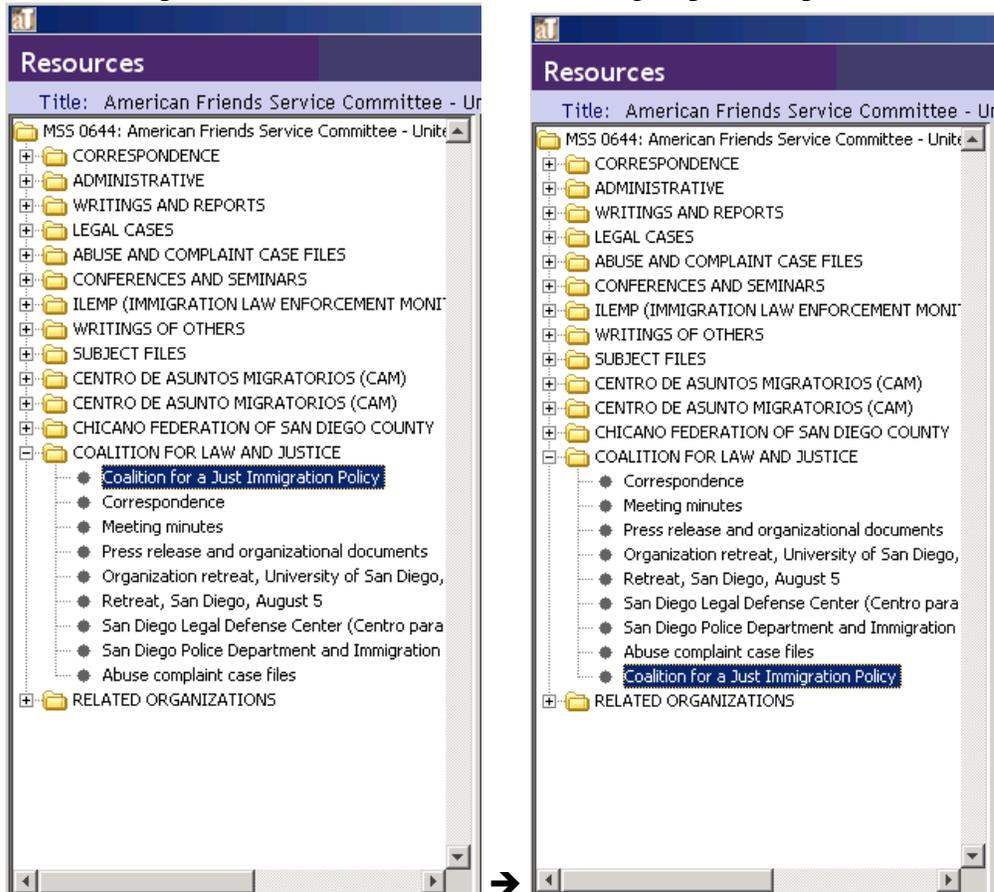
On any RDE screen, fields can be made 'sticky' or 'unsticky' by clicking on 'Ctrl' and the field name. The field label will appear in red if it is a sticky value. A field configured to be sticky means data entered into will be carried over to the next record created using the RDE.

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

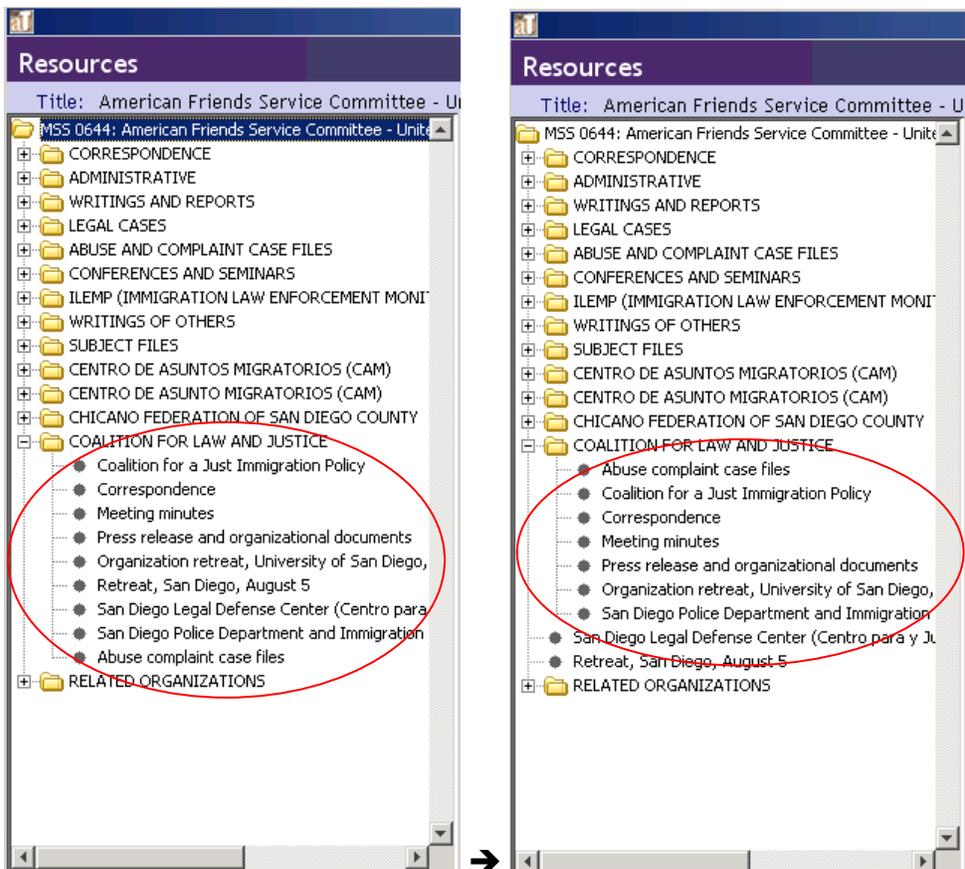
Sticky values override any default value specified for the field. However, sticky values are in effect only during the session in which they are being used. Closing the resource record closes the session, and the values that were set to be sticky no longer are. Default values, if specified, will become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

4. Improved drag & drop (rearrangement) tool

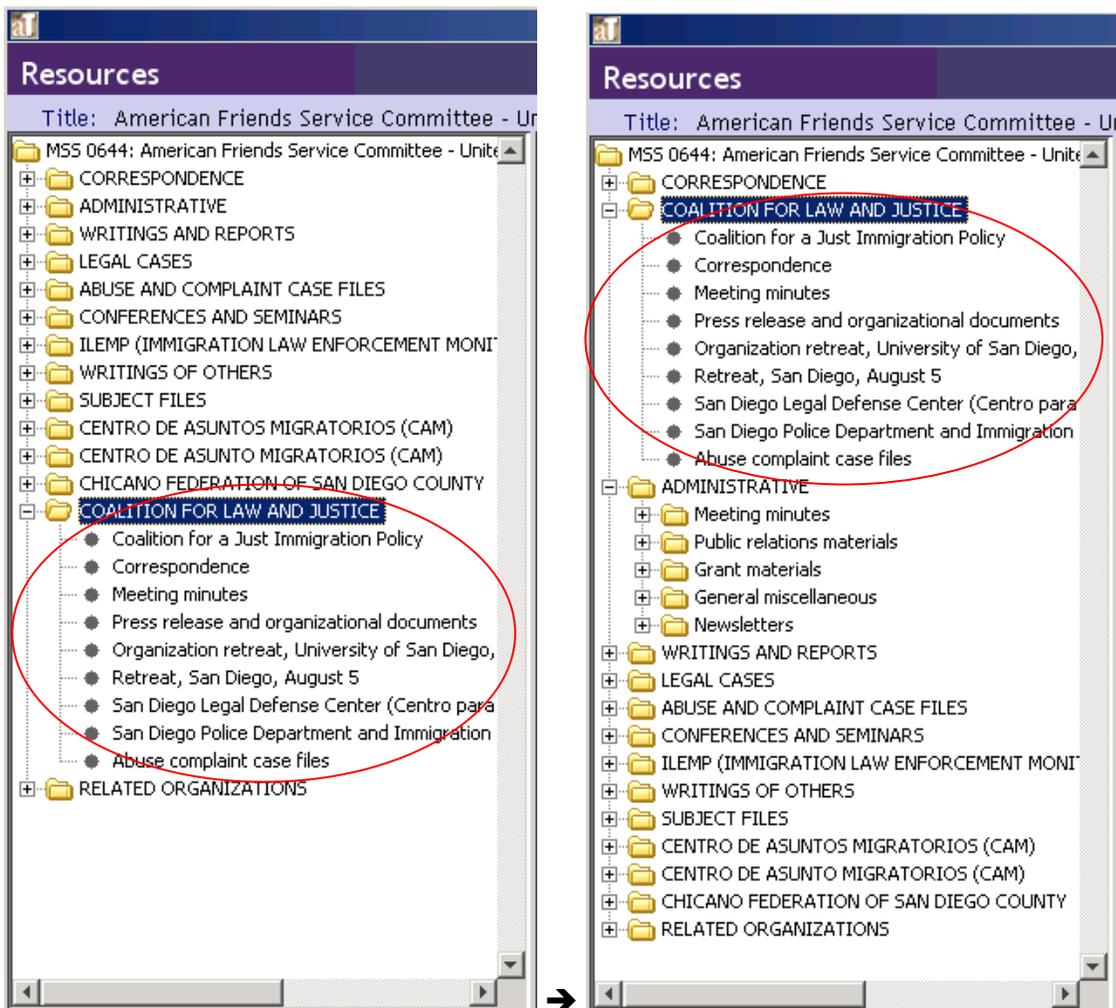
- A component can be moved to the end of a group of components.



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



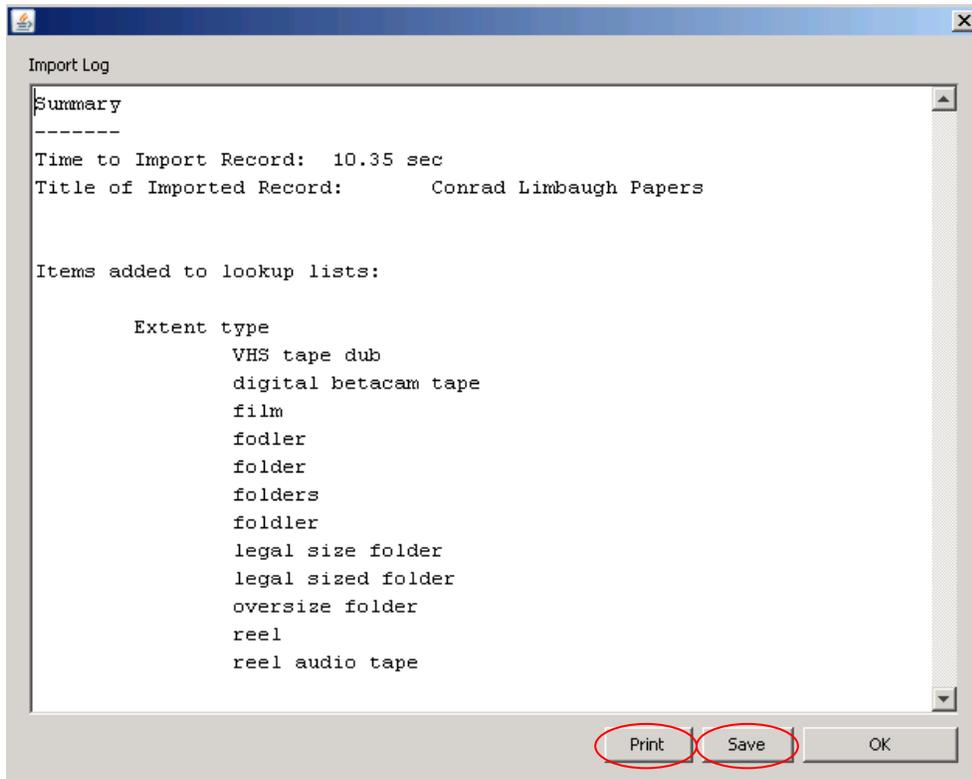
- Can promote a component and all of its children to any level up to level 2, including the ability to place the component between two components, both of which may have children.



- 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.



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 from the drop-down menu.



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

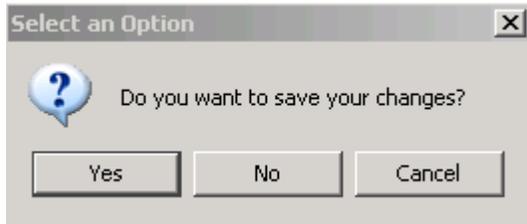
7. Intermittent "Save"



An 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.



8. **Enhanced date format settings**

Version 1.5 of the AT offers 12 date formats including international date formats D/M/YYYY, 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.