# CHAPTER 3: SUPPLEMENTAL RECORDS

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# I. SUPPLEMENTAL RECORDS BASICS

## A. Overview

1. *What are supplemental records?*

Supplemental records are attached to each catalog record for recording additional collections management and research data. Some supplemental records track data that can change over time, such as the location or condition of an object, scientific name, or appraisal value. Others connect the record with a change in object status, such as a loan, deaccession, or exhibit. Others provide object-related information, such as provenance, research notes, and publication citation.

Information from supplemental records does not appear on the catalog screens or the printed catalog record. Completing many of the supplemental records is optional; however, **ICMS** provides prompts and automatic update features that make adding supplemental data easy to do.

2. *Are there different types of supplemental records?*

Although all supplemental record types perform in the same basic way, there are some differences. Some will automatically update when information in a related field on the data entry screen changes. These are referred to as history tracking supplementals. Others require direct input by the user. In addition, there are types which provide a link to related associated modules, such as Exhibits or Loans.

3. *How many fields are in each supplemental?*

Each supplemental record includes up to 8 fields for recording specific information. See Sections II-XXV of this chapter for a list of specific fields by supplemental type and how to use them.

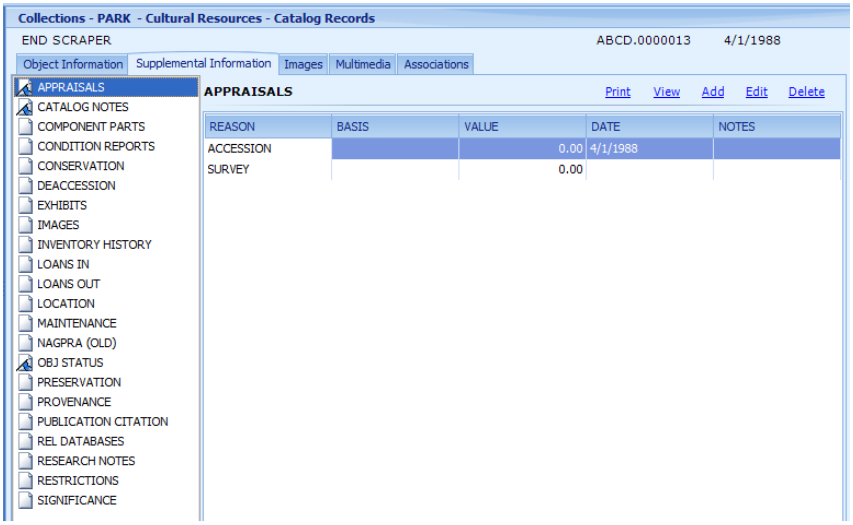
4. *How do I access the supplemental records?*

To access the supplemental data for a catalog record, first go to the catalog records for your directory.

- In the record pane, click on the Supplemental Information tab, *or*
- Press CTRL-N or CTRL-R until the Supplemental Information tab is selected.

5. *How do I know which supplementals have data?*

On the Supplemental Information page in the Record Pane, the supplemental list on the left has a flag next to the supplemental types that contain data for the catalog record. To see the data in a specific supplemental, click on the supplemental name. The entries for that supplemental type will appear in the table on the right.




6. *How are data ordered in the supplemental records?*

With a few exceptions, most supplemental entries appear in the supplemental table by date with the most recent date at the top.

**Note**: Entries with blank Date fields will appear last in the list.

7. *Can I change the sort order of the supplemental records?*

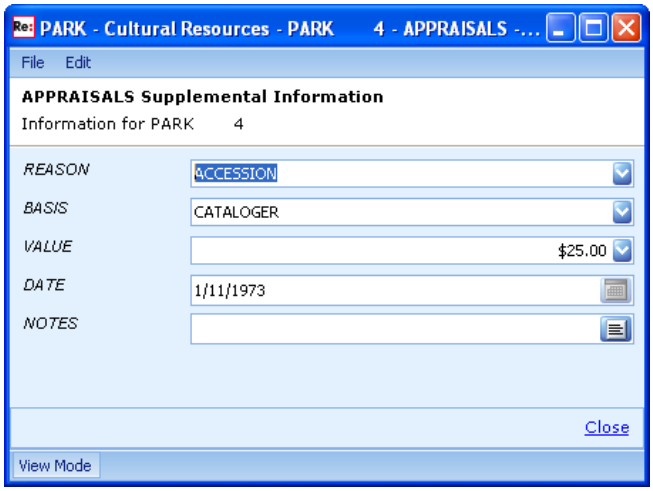
Yes, you can change the sort order of the supplemental entries by clicking the column header for the supplemental field you wish to sort by. You will see an arrow appear in the column header indicating the direction of the sort. If you click the same column header again, the sort order will be reversed.

8. *Can I print the list of supplementals?*

Yes, you can print the supplemental records listed by clicking the Print link just above the supplemental list. A print preview window will open where you can select print or export the list to various file types such as Excel, PDF, and text.

9. *Can I view an expanded version of a single supplemental entry?*

Yes, select the supplemental record in the table and click the View link just above the supplemental table. Or you can double click on the supplemental record. The record will open in a separate window showing the information entered in each field.



10. *Can I use Word Search in the supplemental records?*

Only Appraisals, NAGPRA, and Scientific Name supplemental data are available through Word Search in cultural resources and natural history directories. You can also use Word Search with the Container List supplemental in Archives directories.

**Note:** You can use Advanced Filter to search a specific field in a specific supplemental. Refer to Section XI of Chapter 6 for information on creating an Advanced Filter.

11. *Can I use a Quick Filter in the supplemental records?*

Yes, the supplemental entries can be filtered within a specific supplemental type by clicking the down arrow in the column header and choosing the term or option to filter.

To cancel the Quick Filter, click the down arrow on the column header you filtered on and choose (All). Or you can click the X on the filter indicator line that appears at the bottom of the supplemental entries window.

12. *How do I add a supplemental record?*

For any supplemental, to add a new entry

- Select the supplemental on the Supplemental Information page of the catalog record.
- Click Add above the supplemental entry table.
- A new supplemental window will appear for you to complete the fields as desired.
- Click Save and Close when finished.

**Note**: History tracking and associated module supplementals are often added automatically when either saving a record or attaching groups of records to an associated module. You can also use the Mass Supplemental Update function described in Section E. below to add supplementals to a group of records at the same time.

13. *How do I modify an existing supplemental?*

To modify an existing supplemental:

- Select the supplemental entry on the Supplemental Information page of the catalog record that you wish to modify.
- Click Edit above the supplemental entry table.
- The supplemental window will appear for you to modify the fields as desired.
- Click Save and Close when finished.

**Note**: Modifying the fields of a supplemental associated with an associated module does not change the information in the associated module record.

14. *How do I delete a supplemental record?*

To delete a supplemental record:

- Select the supplemental entry on the Supplemental Information page of the catalog record.
- Click Delete above the supplemental entry table.

- A confirmation message will appear asking if you are sure you want to permanently delete the selected supplemental record. Click Yes.

15. *Can I delete more than one supplemental record at a time?*

Yes, you can select multiple entries of a particular supplemental and delete them all at once.

- Select the supplemental type on the Supplemental Information page of the catalog record.
- In the supplemental table, select one of the supplemental records.
- To select multiple records, hold down the shift key and click another record in the list. All records between the first selected record and the last selected record will be highlighted. To select various, non-adjacent records, hold down the Ctrl key instead and click individual supplemental records in the list.
- Click Delete above the supplemental record table.
- A confirmation message will appear asking if you are sure you want to permanently delete the selected supplemental records. Click Yes.

## B. History Tracking Supplementals

1. *What are history tracking supplementals?*

History tracking supplementals are supplementals connected to specific data entry fields on the main catalog record. When a record is added or modified, a Track Changes window appears when you save the record. This window includes several supplementals related to fields on the main record such as location, condition, and scientific name.

2. *Which supplementals are history tracking supplementals?*

The following supplementals track changes to specific fields in the catalog record. With the exceptions of Object Status and Inventory History, each will appear in the Track Changes window that comes up when you save a record if you have added or modified data in the field.

| ***Cultural Resources:*** | ***Natural History:*** | ***Archives:*** |
|---|---|---|
| Catalog Notes | Catalog Notes | Location |
| Condition Reports | Condition Reports | |
| Inventory History | Inventory History | |
| Location | Location | |
| Object Status | Object Status | |
| | Scientific Name | |

**Note**: Object Status supplemental does not appear in the Track Changes window, but is automatically updated when the object status or year is added or modified. The Inventory History supplemental is created when a catalog record is included in the sample generated by the Inventory module (AIP).

3. *Which catalog fields trigger the history tracking supplementals?*

When a record is added or the following fields are modified, their associated supplemental will appear in the Track Changes window when the record is saved.

Condition or Condition Description
Location
Scientific Name (for Natural History only)
Identified by (for Natural History only)
Identified date (for Natural History only)

***A change to any field in the main catalog record will trigger the Catalog Notes supplemental.***

4. *Must I create a history tracking supplemental when I save the record?*

No, but taking advantage of this feature in the program is recommended. The Track Changes window prompts you for the information needed and then creates the supplementals for you.

## C. Supplementals Linked to Associated modules

1. *Which supplementals link to associated modules?*

There are several supplementals that link to associated module records. These supplementals link catalog records to loans, exhibits, deaccessions, conservation, maintenance, preparation/treatment, and restrictions associated modules.

Conservation
Deaccession
Exhibits
Loans In
Loans Out
Maintenance (Cultural Resources)
Preparation/Treatment (Natural History)
Restrictions

2. *Can I view the related associated module record from the supplemental?*

Yes, you can view the related associated module record from the supplemental record.

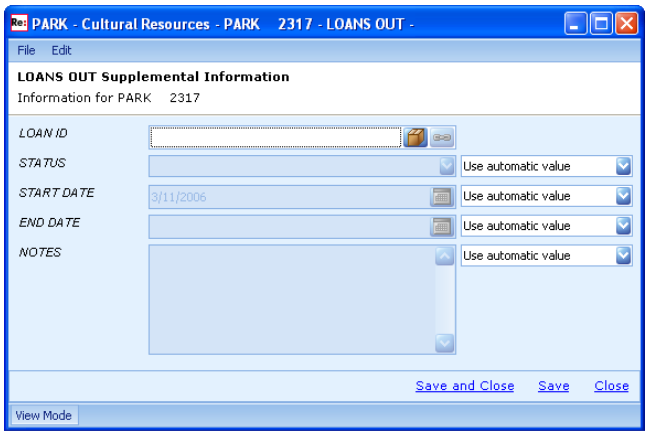
- Go to the supplemental records in your catalog record.
- Select the supplemental associated with the associated module.
- Highlight the supplemental entry.
- Click the View link or double-click the entry to expand it.
- In the expanded window of the supplemental record, click the link icon next to the ID field (the first field in the supplemental record).

The associated module screen will appear showing the information for the associated module record linked in this supplemental.

3. *Can I add a new associated module record from the supplemental record?*

Yes, you can add an associated module record such as Exhibits, Loans, etc. from within the supplemental record.

- Select the desired supplemental associated with an associated module.
- Add a new supplemental record by clicking the Add link above the entry table. A new supplemental entry window will appear.




- In the ID field, right-click and select Browse Authority Table, or press Ctrl-F5.
- The list of associated module records will appear. Click Add to add a new associated module entry.
- The associated associated module data entry screen will appear. Enter the associated module information. Refer to Chapter 4: Associated Modules for information on entering data in a specific associated module.
- Once you have completed the associated module information, click Save and Close.

The associated module entry you added will appear in the list. Select the entry and complete the supplemental.

4. *Can I modify an associated module record from the supplemental?*

Yes, you can also modify an associated module record from within the supplemental entry.

- Select the supplemental entry that contains the associated module record you want to modify.
- Click Edit above the supplemental table.
- In the expanded supplemental window, right-click in the associated module ID field and choose Browse Authority Table or press Ctrl-F5.
- In the associated module list, select the associated module record you want to modify.
- Click Edit and the associated module screen will appear.
- Edit the information as desired and click Save and Close.

**Note**: If you modify an associated module record in this manner, it will not update the supplemental fields that autofill from the associated module nor will it update other catalog record supplementals that may be associated with this same associated module record. It is recommended that you use the Mass Supplemental Update function described in Section E below.

5. *Can I attach groups of catalog records to an associated module record?*

Yes, use the Mass Supplemental Update function described in Section E below.

## D. Other Supplementals

1. *What are the other supplementals not related to associated modules or history tracking?*

The other supplementals included in catalog records are used for adding additional information about the object that may change over time or have multiple entries per record. These supplementals are generally entered individually. Refer to the following sections for a full description of these supplementals.

Appraisals
Component Parts
Images
NAGPRA (Old)
Preservation
Provenance
Publication Citation
Related Databases (Rel Databases)
Research Notes
Significance

**Note:** The NAGPRA supplemental was used in version 2.7 and was replaced by the NAGPRA associated module in version 6.3. The NAGPRA (Old) supplemental remains so you can view legacy data.

2. *Can I add or update these supplemental records in multiple catalog records at the same time?*

Yes, use the Mass Supplemental Update function described in Section E below.

## E. Mass Supplemental Update

1. *What is Mass Supplemental Update?*

Mass Supplemental Update gives you the ability to perform mass updates on any supplemental record type for a group of records. For example, you can attach a group of records to an outgoing loan or update the research notes from a particular researcher on a group of records.

2. *Where do I find the Mass Supplemental Update function?*

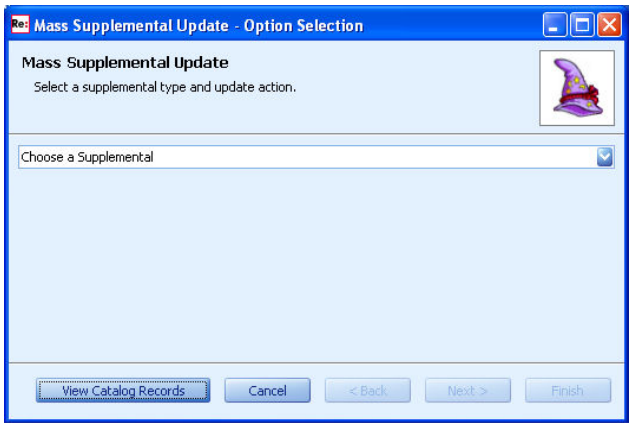
Select Edit on the Menu bar and then Mass Supplemental Update.

**Note**: Mass Supplemental Update is only available when you have limited your visible data either with a Tag Set, Filter or have selected multiple records in the List Pane. Refer to Chapter 6, Section XI for information on Word Search, Tag Sets and Filter.

3. *How do I add supplementals using Mass Supplemental Update?*

To add supplementals using the Mass Supplemental Update function:

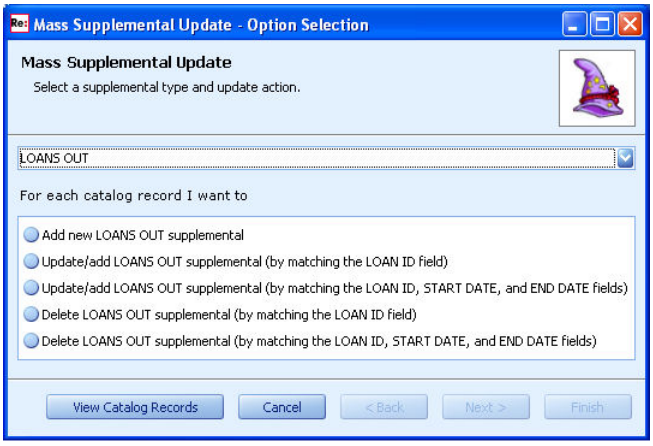
- First create a group of records by using Word Search, setting a Tag Set, setting a filter or selecting multiple records in the List Pane.
- Go to Edit on the Menu Bar and select Mass Supplemental Update. The Mass Supplemental Update wizard screen appears.

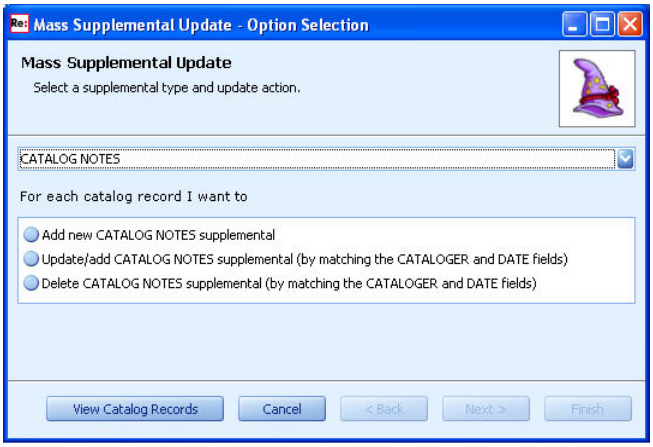



The wizard steps you through the mass supplemental update process:

- Choose a supplemental such as Catalog Notes, Loans Out, Exhibits, etc. from the pull down menu. **Note**: You can view the list of catalog records this update will affect by clicking on the View Catalog Records button.

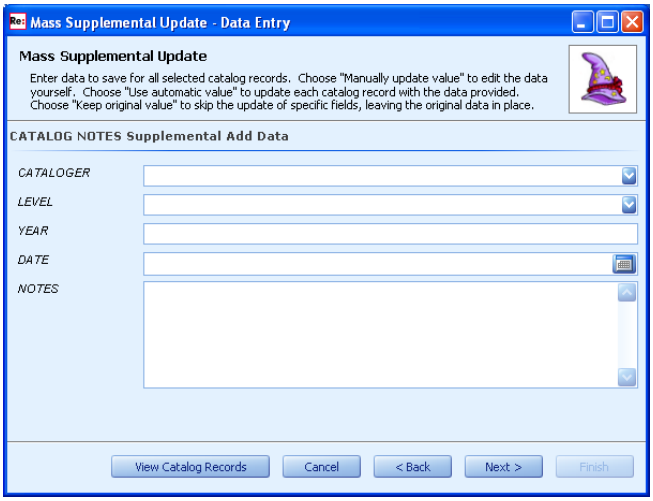
- You will see a list of 3 to 5 mass update actions depending on the supplemental type. Select the "Add new _____ supplemental" option.




- Click Next. **Note**: If at any point you want to change the information in the previous screen of the wizard, click the Back button.

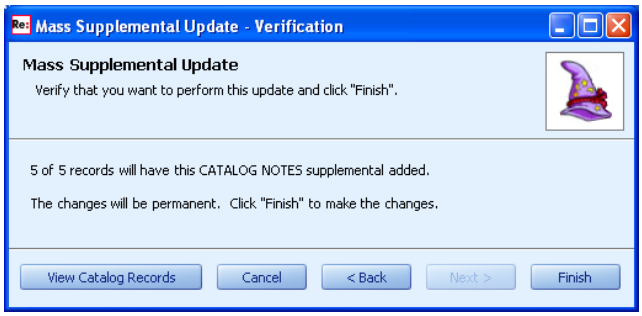
- Complete the supplemental fields. For information on how to complete fields in the supplementals, refer to the sections below for each supplemental.




**Note**: For supplementals related to associated modules like Loans Out and Exhibits, you can add or edit the associated module record from the Mass Supplemental Update by pressing Ctrl-F5 or right-click and choose Browse Authority Table in the ID field in the supplemental. Then click Add or select a record and click Edit.

- Click Next when finished.

- The following screen confirms the number of records that will be added. Click Finish to complete the update.



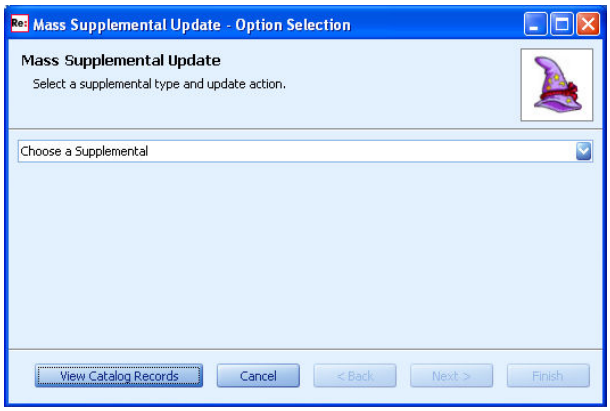

**Note**: If you are adding a supplemental related to an associated module like Loans Out, the program automatically checks the existing supplementals to determine if a matching record already exists with the same ID. If it does, that supplemental will be updated so that duplicates are not added.

4. *How do I update or delete supplementals using Mass Supplemental Update?*

To update or delete supplementals using the Mass Supplemental Update function:

- First create a group of records by using Word Search, setting a Tag Set, setting a filter or selecting multiple records in the List Pane.

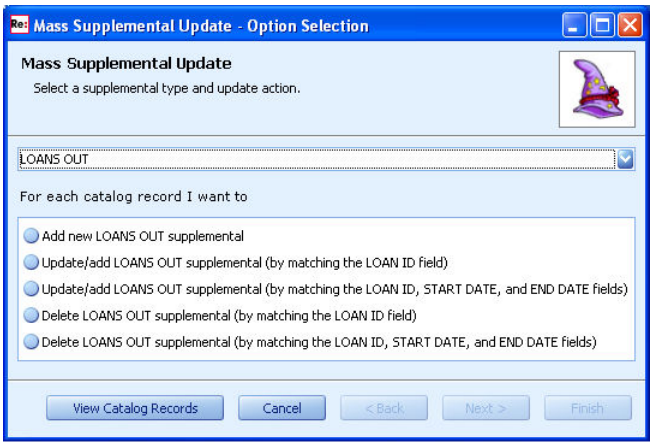
- Go to Edit on the Menu Bar and select Mass Supplemental Update. The Mass Supplemental Update wizard screen appears.




The wizard steps you through the mass supplemental update process:

- Choose a supplemental such as Loans Out, Exhibits, etc., from the pull down menu. **Note**: You can view the list of catalog records this update will affect by clicking on the View Catalog Records button.

- You will see a list of 3 to 5 mass update actions depending on the supplemental type. Select one of the Update or Delete actions:



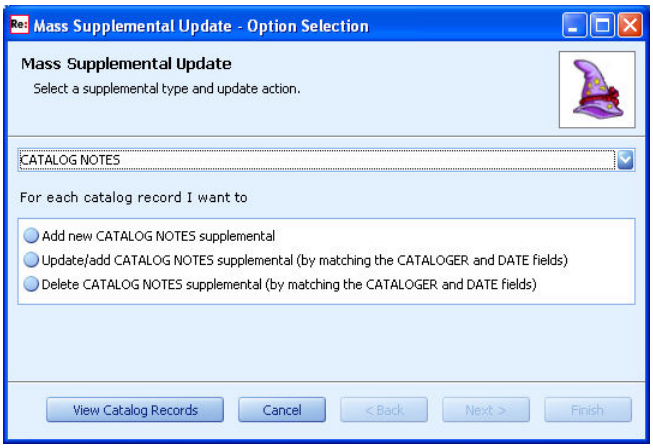

For supplementals related to associated modules, there are two update actions and two delete actions:

***Update/add supplemental (by matching the associated module ID field)*** - If a matching supplemental is found, it will be updated for the selected records. If it is not found, a new supplemental will be added to the selected catalog records.

***Update/add supplemental (by matching the associated module ID, start and end dates)*** - This is a more precise match. Again, if found, it will update the supplemental, otherwise a new supplemental will be added to all selected records.

***Delete supplemental (by matching the associated module ID field)*** - deletes the specified supplemental from all the selected records.

***Delete supplemental (by matching the associated module ID, start and end dates)*** - This is a more precise match to ensure that you are deleting the correct supplemental from all the selected records.



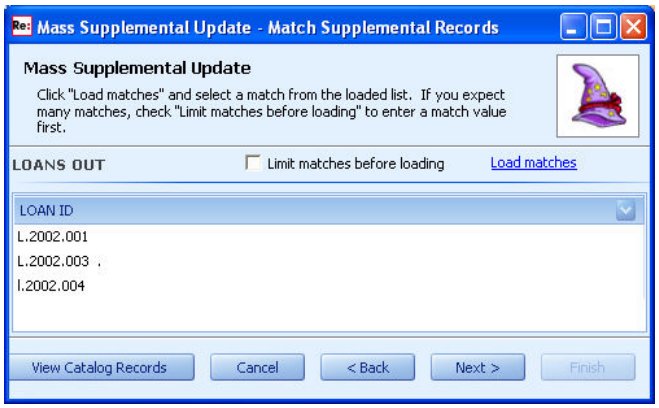

For all other supplemental types, there is one update and one delete action:

***Update/add supplemental (by matching specific fields)*** - The fields vary depending on the supplemental chosen. If a match is found, it will update the supplemental. If not found, a new supplemental will be added to the selected records.

***Delete supplemental (by matching specific fields)*** - The fields vary depending on the supplemental chosen. If the fields do not match exactly, the supplemental will not be deleted from the record.

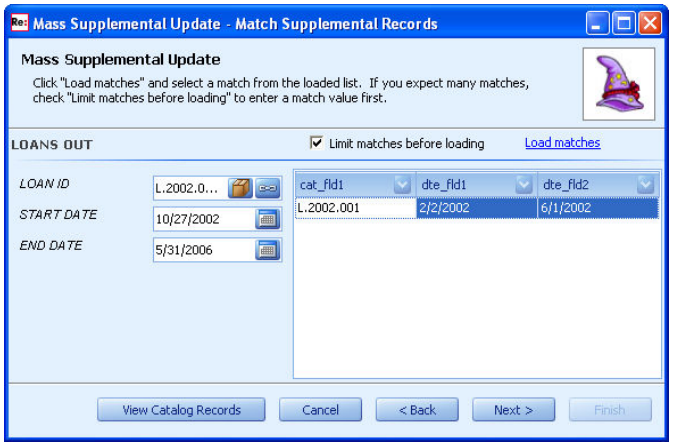
- Click Next.

- You will need to load the matching supplementals on the next screen by clicking Load Matches.




This provides you with a list of the unique supplemental entries found in the selected catalog records for the supplemental you chose.

- If you expect the list to be long, you can limit the matches before loading by checking the 'Limit matches before loading' option.



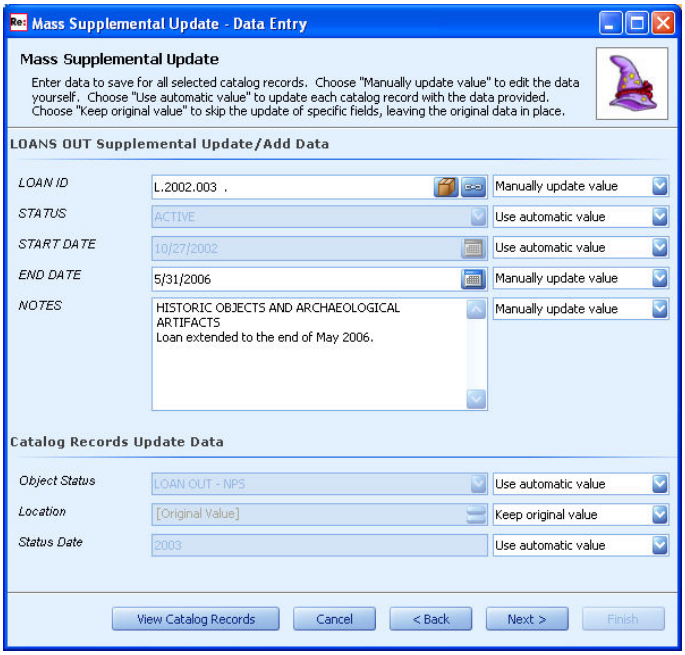

With this option checked, you will be able to filter the supplemental data for the specific supplemental you want to update.

**Note**: The fields displayed will depend on the supplemental type and update or delete action you chose.

- Fill in the information for the specific supplemental you want to update or delete. Then click Load Matches to see the list of supplemental entries.

- Select the supplemental entry in the list and click Next.

- If you are updating a supplemental, the data entry screen for the supplemental selected will appear with the information from the supplemental filled in.



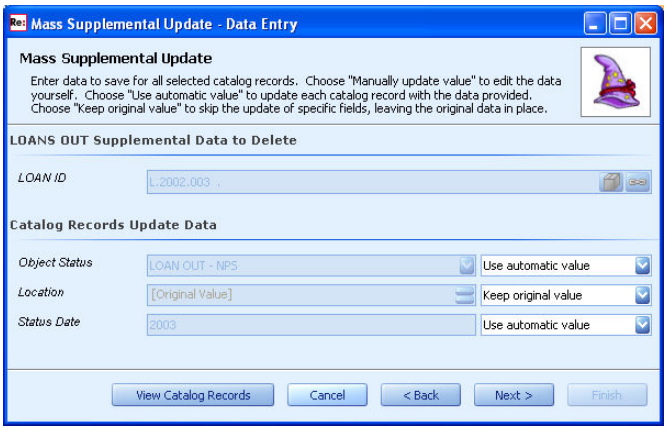

- Modify the information in the fields as desired. To open the fields for modifying, choose “Manually Update Value” on the pull down menu next to the field. Refer to the sections below for information on completing the fields in each supplemental.

**Note**: For supplementals related to associated modules like Loans Out and Exhibits, you can edit the associated module record from the Mass Supplemental Update by pressing Ctrl-F5 or right-clicking and choosing Browse Authority Table in the ID field in the supplemental. Then select the associated module record and click Edit.

**Note**: Several of the associated module supplementals allow you to update specific catalog record fields at the same time. You can update the object status, location and status date fields as desired. If you choose to "Keep original value" on a field like location, the data in that field will not be changed on the catalog record.

- Click Next when finished.

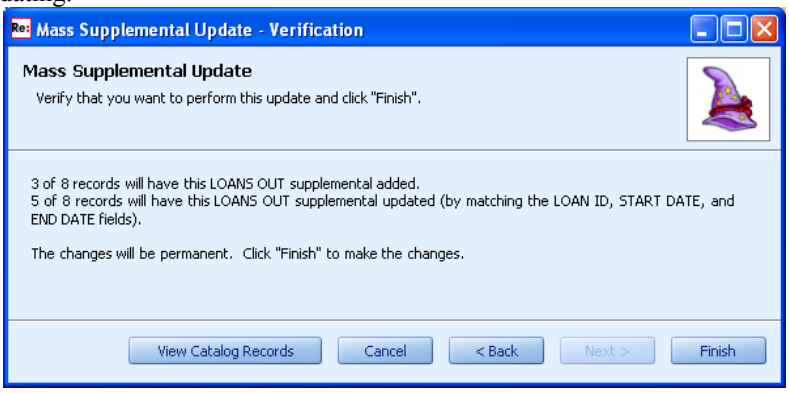
- If you are deleting a supplemental that also updates catalog record information (such as the Loans Out supplemental), the following screen opens showing the matched fields of the supplemental and the catalog record fields that can be updated if desired.




- Click Next when finished.

- The following screen confirms the number of records that will be added, updated or deleted.

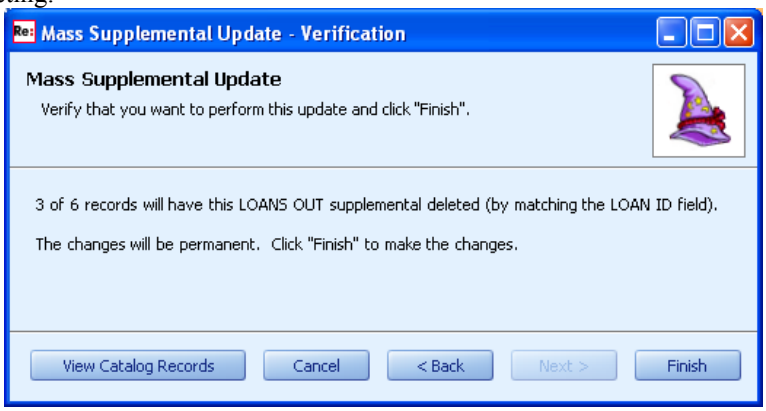
Updating:




**Note:** When updating supplementals, there is the potential that not all catalog records will have a matching supplemental. For those without a matching supplemental, a new supplemental will be added. For those with matching

supplementals, the supplemental record will be updated. The counts reflect how many will have the supplemental added and how may will have the supplemental updated.

Deleting:




- Click Finish to make the changes.

The update may take a few minutes to complete. You will see a confirmation message when it has finished. Click OK.

# II. APPRAISALS SUPPLEMENTAL RECORD

## A. Overview

1. *When do I use the Appraisals supplemental record?*

Use the Appraisals supplemental record to document the monetary value of an object. The supplemental record will provide a history of appraisals and changes in value.

2. *What information does the Appraisals supplemental record contain?*

The Appraisals supplemental record includes:

- reason for appraisal
- basis for the appraised value
- appraised value
- date of appraisal
- appraiser (under notes)
- appraisal report (under notes)
- notes

3. *Must I create an Appraisals supplemental record?*

No. Use of this feature is optional. You may not have appraisals or a monetary value for many objects.

4. *Do the data in the Appraisals supplemental record print on the catalog record?*

Yes. The most recent appraisal information prints in the Current Value, Date, Basis field on the catalog record (NPS Form 10-254 and DOI CR/NH Museum Catalog Record). The most recent appraisal appears in the top line of the table.

***To document acquisition value, make an entry in the Appraisals supplemental record. Choose Accession as the entry for the Reason field. The program will print this entry in the Value At Acquisition, Basis field on the catalog record (NPS Form 10-254 or DOI CR/NH Museum Catalog Record).***

## B. Adding an Appraisals Supplemental Record

1. *How do I complete an entry in the Appraisals supplemental record?*

Complete the Appraisal supplemental fields as follows:

**Note**: Individual field help is not available for supplemental records.

*Reason*

User-built table (F5, Ctrl-F5)

Enter the reason for obtaining the value. Possible entries include collection survey, purchase price, insurance, accession, deaccession, and outgoing loan. You may add others.

**Note**: Choose "Accession" to document acquisition value.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Basis*

User-built table (F5, Ctrl-F5)

Enter the basis for the value. Possible entries include appraiser, cataloger, or market.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Value*

Numeric field.

Enter the monetary value of the object. The field includes two decimal places. Do not enter commas.

Example: 2350.00

*Date*

Date field.

Enter the date that the value was assigned. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 2/2/2006

*Notes*

Formatted memo field (F12 to expand). The field also will expand as you begin to type or click on the icon. The field will expand into three subfields: Appraiser, Appraisal Report, and Notes. An underline separates the subfield entries on the screen.

***Appraiser* (user-built, stacked table that links to the Names and Addresses table):**

Enter the full name of the person, last name first, who appraised the object.

As you type, the word will complete from an authority table of names in the Names and Addresses associated module. Press the F5 key or click the person icon to view and select names from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right-click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The Names and Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can then select it from the table.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash - - separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

***Appraisal Report*** **(memo field):**

Enter information from the appraisal report or cut and paste the report into the field.

***Notes*** **(memo field):**

Enter any additional information, including notes on the basis for the value.

# III. CATALOG NOTES SUPPLEMENTAL RECORD

## A. Overview

1. *When do I use the Catalog Notes supplemental record?*

Use the Catalog Notes supplemental record to document and track changes to the catalog record.

2. *What is the purpose of the Catalog Notes supplemental record?*

The Catalog Notes supplemental record provides you with a history of cataloging activity for the object. It allows you to see on one screen all the changes that have been made to a catalog record. It shows you:

- who cataloged or modified the record
- the type or level of the activity, such as catalog, recatalog, or minor modification
- the year and date the activity took place
- notes about the activity

3. *Must I create a Catalog Notes supplemental record?*

No, but taking advantage of this feature in the program is recommended. When you add or modify a catalog record, the program prompts you for the information needed to create the record and then creates the record for you.

## B. Adding a Catalog Notes Supplemental Record

1. *How does the Catalog Notes supplemental record work?*

The program creates the Catalog Notes supplemental record from the information you enter when you save the catalog record. When you save a catalog record after completing or changing it, the Track Changes window appears. The Catalog Notes supplemental is always included in the Track Changes window whenever you add or modify and save a record.

**Note:** If you only make changes to a supplemental record when modifying a catalog record, the Catalog Notes supplemental is not triggered.

The program remembers the cataloger name and level from the last time you saved a record. It also enters the year and the date. You can leave the automatic values or choose to manually update any of the fields in the supplemental. This information becomes an entry in the Catalog Notes supplemental record. Each additional change in catalog data is recorded as another entry in the supplemental record.

**Note:** If you choose not to update the catalog notes supplemental by checking the Do Not Update option in the Track Changes window, there will not be an entry in the Catalog Notes supplemental record.

2. *Can I go into the supplemental record and make an entry on the screen?*

Yes, you can add, modify and delete any of the catalog notes supplementals from the Supplemental Information page. But it is much easier to have the program create the record for you from the Track Changes window.

3. *How do I complete the fields in the catalog level supplemental?*

Instructions for completing the fields are also available in each section of Chapter 2, Cataloging.

*Cataloger*

User-built table (F5, Ctrl-F5).

Enter the name of the cataloger who created or changed the catalog record. Enter the last name first.

Example: Brown, John

**Note:** The name you enter in the Track Changes window does not change the name in the Cataloger field on the catalog record. The name you enter goes to the Catalog Notes supplemental record only.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Level*

Bureau controlled table (F5). You may not add to, delete, or modify terms in this table.

Enter the level of cataloging.

Choose from the entries in the table as defined below.

***Catalog*** - you have completed all fields for which there is information.

***Draft -*** you have not completed all required fields but wish to save the record anyway. **Note:** Be sure to complete the required fields later. A Draft record is not an official record and will not be counted by the CMR or the National Catalog.

***Minor Change*** - you have made minor changes, such as spelling corrections or location changes.

***Recataloged*** - you have made substantial changes to the data, such as changes in date, classification, and object name.

***Registration*** - you have completed only the registration screen and the required fields on the other 3 screens.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

*Year*

Numeric field.

Enter a four-digit year. This is the year in which the cataloger created or changed the catalog record.

Example: 2006

*Date*

Date field.

**Note**: this field does not appear in the Track Changes window, but is automatically entered by the program with the current date in the supplemental.

If you are editing or entering a catalog notes supplemental from the Supplemental Information page, enter the date the cataloger created or changed the catalog record. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 3/12/2006

*Notes*

Memo field.

Enter additional information about the entry.

Example: Changed the date from 1860 to 1870 after additional research revealed that the sleeve style was not popular until 1870.

# IV. COMPONENT PARTS SUPPLEMENTAL RECORD

## A. Overview

1. *When do I use the Component Parts supplemental record?*

Use the Component Parts supplemental record to document the name and location of component parts. For a definition of component parts, refer to the NPS *Museum Handbook*, Part II, Appendix C, Cataloging Guidelines and the DOI *Museum Property Handbook*, Volume II, Appendix J, Marking and Numbering Museum Property.

2. *What is the purpose of the Component Parts supplemental record?*

The Component Parts supplemental record provides a screen for listing the name for each component part. It allows you to see a listing on one screen of all an object's component parts and their location.

3. *How does the Component Parts field in the catalog record relate to the Component Parts supplemental record?*

The Component Parts field and supplemental record function as follows:

- Indicate that an object contains component parts by entering a designator (a-b, a-c, etc.) in the Component Parts field. This field appears on the registration screen of the catalog record.
- Click on the Component Part link to go directly to the Component Parts supplemental record and complete the record. See Section B.1 for instructions on entering records.

4. *Must I create a Component Parts supplemental record?*

No. Use of this feature is optional. Many objects do not contain component parts.

5. *How are entries ordered in the Component Parts supplemental record?*

Entries appear on the screen in progressive order (the order in which you enter them).

## B. Adding a Component Parts Supplemental Record

1. *How do I make an entry in the Component Parts supplemental record?*

You will usually enter data in the Component Parts supplemental record when you are adding or modifying a catalog record. Click on the Component Part link to access the supplemental record.

To make an entry, click Add and complete the fields as follows:

*Part Number*

Straight entry field.

Enter the lower-case letter designator for the part.

Example: a
b

**Note:** The program does not automatically enter the designator from the catalog record screen.

*Term*

Straight entry field.

Enter the appropriate term for the part.
Example: crevice tool
lid

*Location*

Memo field.

Enter the location of the part if the location differs from the object's location. Use the scroll arrows to view the text.

Example: CAB 23 SH D

**Note:** You don't usually store component parts in different locations. The location for component parts is usually the same.

2. *Can I access the Component Parts supplemental without using the Component Part link?*

Yes. Click on the Supplemental Information tab of the catalog record and select the Component Parts supplemental.

# V. CONDITION REPORTS SUPPLEMENTAL RECORD

## A. Overview

1. *When do I use the Condition Reports supplemental record?*

Use the Condition Reports supplemental record to document and track changes in an object's condition.

2. *What is the purpose of the Condition Reports supplemental record?*

The Condition Reports supplemental record provides a history of an object's condition. It allows you to see, on one screen, various changes in condition that have occurred over a period of time. It shows you:

- condition
- name of the person who authorized the condition entry or logger ID
- reason for the entry
- date of the entry
- condition description and/or notes about condition

3. *Must I create a Condition Reports supplemental record?*

No, but taking advantage of this feature in the program is recommended. When you add or modify the condition or condition description fields of a catalog record, the program prompts you for the information needed to create the record and then creates the record for you.

## B. Adding a Condition Reports Supplemental Record

1. *How does the Condition Reports supplemental record work?*

The program creates the Condition Reports supplemental record from the information you enter when you save the catalog record. When you save a catalog record after completing or changing the Condition or Condition Description fields, the condition reports supplemental is included in the Track Changes window. You should enter the reason for the condition. The program automatically enters the condition, authorized by (logger ID), current date and data from the Condition Description field. You may edit the date and Condition Description only by selecting Manually Update value next to the field. This information becomes an entry in the Condition Reports supplemental record. Each additional change in condition or condition description is recorded as another entry in the supplemental record.

**Note:** If you choose to cancel the condition reports supplemental by checking the Do Not Update option in the Track Changes window, there will not be an entry in the Condition Reports supplemental record.

2. *How do the condition fields in the catalog record relate to the Condition Reports supplemental record?*

The catalog record contains two condition fields:

- Condition, which measures condition by the criteria of complete, incomplete, or fragment, and excellent, good, fair, or poor.
- Condition Description, which is a narrative description of condition.

| *If you...* | *Then...* |
|---|---|
| add or change the condition or condition description | the program includes the condition reports supplemental in the Track Changes window. After you complete the condition information and click OK, it creates a Condition Reports supplemental record. The program transfers |

any data that appears in the Condition Description field to the supplemental record.

**Note:** To distinguish between entries in the Condition Description field, it is a good idea to date and separate the entries. Enter the most recent description at the beginning of the field to correspond with the current condition.

Example: Small hole in the collar (12/02/1997).
Moth damage around hemline (04/25/1995).

3. *Can I go into the supplemental record and make an entry on the screen?*

Yes, you can add, modify and delete any of the condition reports supplementals from the Supplemental Information page. But it is much easier to have the program create the record for you from the Track Changes window.

4. *How do I complete the fields in the Condition Reports supplemental?*

Instructions for completing the prompt fields are also available in each section of Chapter 2, Cataloging.

*Condition*

Bureau controlled table (F5). You may not add to, delete, or modify terms in this table.

Enter the condition of the object using one term from each of the two criteria groups.

**Note:** In the Track Changes window, this field is automatically completed from the Condition field on the catalog record. You cannot edit the field from Track Changes.

To complete the field from the Supplemental Information page, as you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

*Authorized By*

User-built table (F5, Ctrl-F5).

Enter the name of the person, last name first, who authorized, or determined, the condition. The table for this entry is the same as the table for the Cataloger field in the catalog record. The cataloger is usually the person who determines the condition.

Example: Brown, Roberto

**Note:** In the Track Changes window, this field is automatically completed from the logger ID. You cannot edit the field from Track Changes.

To complete the field from the Supplemental Information page, as you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Reason*

User-built table (F5, Ctrl-F5).

Enter the reason for the change in condition. You may want to keep the reason broad or generic. You can then enter details in the Condition memo field.

Example: Water Damage
Conservation
Insect Damage

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Date*

Date Field.

Enter the date of the condition. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 3/12/2006

*Condition Description (Cond Desc)*

Memo field.

Enter additional information about the object's condition.

**Note:** Information that you add to the supplemental record does not transfer back to the catalog record.

Example: Damage occurred due to flooding 5/9/96. The object was initially freeze-dried and then received conservation treatment from HFC. See conservation report.

# VI. CONSERVATION SUPPLEMENTAL RECORD

## A. Overview

1. *When do I use the Conservation supplemental record?*

Use the Conservation supplemental record to view, add, update, or delete a conservation record for an object. The conservation record documents and tracks the conservation treatment an object has received. You can also use this to document conservation work that an object needs, as noted on a conservation survey or report.

2. *Where is the conservation information located?*

You enter information about conservation in the Conservation associated module. This module is linked to the Conservation supplemental record. See Section II of Chapter 4 for information on the Conservation associated module.

3. *What is the difference between the Conservation associated module and the Conservation supplemental record?*

The Conservation associated module contains all the information about a conservation treatment. It includes fields such as conservation description, conservation date, results and conservation materials.

The Conservation supplemental record links an individual catalog record to the information in the Conservation associated module. The linking field is the Catalog Number. The supplemental record displays only a two fields: conservation due date, and conservation description.

4. *Do I have to enter conservation information in both the Conservation associated module and the Conservation supplemental record?*

No. You do not enter information in both places. The program will automatically complete the supplemental record from the information you enter in the Conservation associated module. The fields in the conservation supplemental cannot be edited except by adding or modifying the Conservation associated module record.

5. *What is the purpose of the Conservation supplemental record?*

The Conservation supplemental record allows you to view, add, update, or delete conservation information without exiting the catalog record. It also provides a history of what conservation treatment has been done to an object.

**Note:** You can also print the list of conservation supplementals associated with a catalog record. The print option on the supplemental tab is only available on supplementals that are linked to the associated module record by the Catalog Number only. All other supplemental types can be included on quick reports.

6. *Must I create a Conservation supplemental record?*

No. Use of this feature is optional. You may not have conservation treatments on every object.

## B. Adding a Conservation Supplemental Record

1. *What do I need to do to have the program automatically complete the supplemental record?*

In the Conservation associated module, enter the catalog number of the object that requires conservation treatment. The Catalog Number field links the Conservation associated module to the catalog record. When you save a record in the Conservation associated module, the program creates/updates the Conservation supplemental record for the catalog record.

2. *How do I add, update, view or delete a conservation record in the Conservation associated module?*

The Conservation supplemental record allows you to add, view, edit and delete a conservation record in the Conservation associated module without leaving the catalog record. When you select the Conservation supplemental on a catalog record and click add, edit, or view, the Conservation associated module screen will appear in the mode you selected (add, modify, view).

If you are adding or modifying a conservation record, complete the conservation screen as described in Section II of Chapter 4.

If you are deleting the conservation record, the system will ask you if you are sure you want to delete the selected conservation record which includes both the supplemental and the Conservation associated module record.

3. *Can I use the Mass Supplemental Update function to add or modify a conservation supplemental record?*

No. The conservation record is a one to one relationship with the catalog record based on the catalog number. You cannot attach a group of records to a single conservation record. These must be added or modified individually.

# VII. DEACCESSION SUPPLEMENTAL RECORD

## A. Overview

1. *When do I use the Deaccession supplemental record?*

If your bureau has deaccessioning authority, use the Deaccession supplemental record to attach deaccession information to individual catalog records.

2. *Where is the deaccession information located?*

You enter information about deaccessions in the Deaccessions associated module. This module is linked to the Deaccession supplemental record. See Section VIII in Chapter 4 for information on the Deaccessions associated module.

3. *What is the difference between the Deaccessions associated module and the Deaccession supplemental record?*

The Deaccessions associated module contains all the information about a deaccession. It includes fields such as the name of the recipient and the total value of the deaccession. You can print deaccession forms from the Deaccessions associated module.

The Deaccession supplemental record connects an individual catalog record to the deaccession information in the Deaccessions associated module. The connecting field is the Deaccession Number. The supplemental record contains only a few fields, such as Status and Deaccession Date. You cannot print deaccession forms from the supplemental record.

4. *Do I have to enter deaccession information in both the Deaccessions associated module and the Deaccession supplemental record?*

No. You don't have to enter information in both places. The program will automatically complete the Deaccession supplemental record from the information you enter in the Deaccessions associated module. You can complete a supplemental record by entering the data manually, but this method is not recommended.

When you use the Deaccessions associated module and a deaccession is approved, the program will automatically change the:

- Proposed Deaccession Number to the Approved Deaccession Number on the supplemental records
- Deaccession Status field on the deaccession record and supplemental records to "Deaccessioned"
- Object Status and Status Date fields on the catalog record to show the deaccession type and date
- Location field on the catalog record to "Deaccessioned"

5. *What is the purpose of the Deaccession supplemental record?*

The Deaccession supplemental record allows you to look at deaccession information without exiting the catalog record. The supplemental record also allows you to track the deaccession process for the object.

## B. Adding a Deaccession Supplemental Record

1. *What do I need to do to have the program automatically complete the supplemental record?*

There are two ways to complete the supplemental record from the catalog record.

For a single catalog record that is being deaccessioned:

- Go to the Supplemental Information tab and select the Deaccession supplemental.

- Add a new supplemental record.

- In the Deacc # field, press F5 or click the Deaccession icon to view a list of deaccession records.

- To add a new deaccession record, press Ctrl-F5 in the Deacc # field and click Add.

- The Deaccession associated module screen will appear. Complete the deaccession information. Refer to Section VIII of Chapter 4 for completing the deaccession information. Click Save and Close when finished entering the deaccession record. The record you added will appear in the list.

- Click Select to enter the deaccession number in the supplemental.

- When you tab out of the Deacc # field, the remaining supplemental fields will automatically complete from the deaccession record.

- Click Save and Close.

**Note**: You can only modify the Notes field in the Deaccession supplemental.

To add Deaccession supplementals to a group of records, use the Mass Supplemental Update function described in Section I.E above.

The program will automatically attach the catalog record to the deaccession record in the Deaccessions associated module and create the Deaccession supplemental record.

The fields will carry over as follows:

| **Associated Module Fields** | **Supplemental Fields** |
|---|---|
| Deac Nbr | Deacc # |
| Deac Status | Deac Status |
| Deac Date | Deac Date |
| Objects | Notes |

**Note:** The proposed deaccession number is a number that begins with a "P". When the deaccession is approved, the system will change the number to an approved deaccession number. An approved deaccession number begins with a "D". When you change a proposed deaccession number to an approved deaccession number, the program updates all related supplemental records.

2. *Can I manually edit the data fields in the Deaccession supplemental record?*

Yes, you can edit the deaccession supplemental fields of an existing deaccession supplemental record. However, using the edit function is not recommended. If the program has automatically created the Deaccession supplemental record, you should only modify the Notes field.

***Manually completing a record can cause inconsistencies in your records. The data that you insert or modify in the supplemental record is not transferred back to the Deaccessions associated module or the catalog record. It is much easier to have the program create the record for you as described in B.1.***

**Note:** When you add a deaccession supplemental, the only field you can edit other than the Deacc # is the Notes field.

If for some reason, you need to modify a Deaccession supplemental record, complete the fields as follows:

*Deaccession # (Deacc #)*

User-built table (F5, Ctrl-F5) that links to the Deaccession associated module.

If the object has not yet been approved for deaccession, select the proposed deaccession number from the table. Press F5 or click the down arrow to view and select an entry from the table. The proposed deaccession number begins with a "P". This is not the same as the deaccession number.

Example P.12

**Note:** You can add and modify deaccession records by pressing Ctrl-F5 or right-click and select Browse Authority Table. Click Add to enter a new deaccession or select an entry and click Edit.

***The program will not allow you to attach catalog records to an approved Deaccession. The authority table for the Deaccession # will only show pending deaccession records (those starting with a P).***

*Deac Status*

Bureau controlled table (F5).

Enter the status of the deaccession. Choose from the three entries: deaccessioned, disapproved, and pending.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

*Deac Date*

Date field.

Enter the date of the deaccession. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 2/09/2005

*Notes*

Memo field.

Enter any additional information about the deaccession.

Example: Intention to donate this object to the Charles Town Museum is being advertised on the WWW.

# VIII. EXHIBITS SUPPLEMENTAL RECORD

## A. Overview

1. *When do I use the Exhibits supplemental record?*

Use the Exhibits supplemental record to attach exhibits information to individual catalog records.

2. *Where is the exhibits information located?*

You enter information about exhibits in the Exhibits associated module. This module is linked to the Exhibits supplemental record. See Section III of Chapter 4 for information on the Exhibits associated module.

3. *What is the difference between the Exhibits associated module and the Exhibits supplemental record?*

The Exhibits associated module contains all the information about an exhibit. It includes fields such as the exhibit type and exhibit title.

The Exhibits supplemental record connects an individual catalog record to the exhibit information in the Exhibits associated module. The connecting field is the Exhibit ID. The supplemental record contains only a few fields, such as the start and end dates for the exhibit.

4. *Do I have to enter exhibit information in both the Exhibits associated module and the Exhibits supplemental record?*

No. You don't have to enter information in both places. The program will automatically complete the Exhibits supplemental record from the information you enter in the Exhibits associated module. You can complete a supplemental record by entering the data manually, but this method is not recommended.

5. *What is the purpose of the Exhibits supplemental record?*

The Exhibits supplemental record allows you to see exhibit information without exiting the catalog record. The supplemental record can also provide a history of exhibit activity for the object. It shows the number of times an object was placed on exhibit and the dates of the exhibits.

6. *Do I have to use the Exhibits associated module and supplemental?*

No. You are not required to complete the Exhibits associated module or supplemental. Exhibit records are an optional feature of the program.

7. *Does the Exhibits supplemental record update the Object Status field on the catalog record?*

If you add an exhibit supplemental individually, you must manually update the Object Status and Status Date fields on the catalog records for exhibits.

If, however, you use the Mass Supplemental Update function when adding or updating an exhibit supplemental, the program allows you to update the Object Status, Location and Status Date at the same time.

## B. Adding an Exhibits Supplemental Record

1. *What do I need to do to have the program automatically complete the supplemental record?*

There are two ways to complete the supplemental record from the catalog record.

For a single catalog record:

- Go to the Supplemental Information tab and select the Exhibits supplemental.
- Click Add to enter a new supplemental record.
- In the Exhibit ID field, press F5 or click the Exhibits icon to view and select from the list of exhibit records.

- To add a new exhibit record, press Ctrl-F5 in the Exhibit ID field and click Add.

- The Exhibit associated module screen will appear. Complete the exhibit information. Refer to Section III of Chapter 4 for completing the exhibit record. The record you add will appear in the list.

- Click Select to enter the exhibit ID in the supplemental.

- When you tab out of the Exhibit ID field, the remaining supplemental fields will automatically complete from the exhibit record.

- Click Save and Close.

To add the same Exhibit supplemental to a group of records, use the Mass Supplemental Update function described in Section I.E above.

The program will automatically attach the catalog record(s) to the exhibit record in the Exhibits associated module and create the Exhibits supplemental record.

The fields will carry over as follows:

| **Associated Module Fields** | **Supplemental Fields** |
|---|---|
| Exhibit ID | Exhibit ID |
| Status | Status |
| Start Date | Start Date |
| End Date | End Date |
| Title | Notes |

2. *Can I manually complete the data fields on the Exhibits supplemental record?*

Yes. When adding a supplemental record, you can change the data by choosing "Manually update value" from the pull down next to the supplemental field. However, the data that you insert or modify do not transfer back to the Exhibits associated module or the catalog record. It is much easier to have the program create the record for you.

If you want to modify an existing supplemental, highlight the supplemental and click Edit. All fields will be available for updating manually.

If for some reason, you need to modify data in an Exhibits supplemental record, complete the fields as follows:

*Exhibit ID*

User-built table (F5, Ctrl-F5) that links to the Exhibits associated module.

Enter the unique identifying number of the exhibit. This number is assigned by the unit.

As you type, the entry will complete from the authority table of Exhibit Ids. Press F5 or click the exhibit icon to view and select an exhibit record from the list.

**Note**: You can add and edit exhibit records by pressing Ctrl-F5 or right-click and select Browse Authority Table. Click Add to enter a new exhibit or select an entry and click Edit.

*Status*

Bureau controlled table (F5)

Enter the status of the exhibit. Choose from the three entries: active, ended and pending.

As you type, the entry will complete from the authority list of acceptable terms. Press F5 or click the down arrow to view and select a term from the list.

*Start Date*

Date field.

Enter the opening date of the exhibit. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 2/9/2004

*End Date*

Date field.

Enter the ending date of the exhibit. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 10/1/2005

*Notes*

Memo field.

Enter any additional information about the exhibit, including the exhibit title.

# IX. IMAGES SUPPLEMENTAL RECORD

## A. Overview

1. *When do I use the Images supplemental record?*

Use the Images supplemental record to document and track images of an object.

2. *What information does the Images supplemental record contain?*

The Images supplemental record includes:

- number used to identify an image
- type of image
- date the image was taken
- notes

3. *Must I create an Images supplemental record?*

No. Use of this feature is optional. You may not have images for every object.

## B. Adding an Images Supplemental Record

1. *How do I make an entry in the Images supplemental record?*

Complete the fields to the Images supplemental record as follows:

**Note**: Individual field help is not available for supplemental fields.

*Image #*

Straight entry field.

Enter the number assigned to the image. Enter the film roll number and negative frame number separated by a slash for photographs.

Example: 2/11

*Type*

User-built table (F5, Ctrl-F5)

Enter the type of image.

Example: Black & White Print
Color Print
Color Transparency
Digital – Color

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Date*

Date field.

Enter the date the image was taken. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 3/12/1989

| | |
|---|---|
| *Notes* | Memo field.<br><br>Enter information about the image.<br><br>Example: Image taken by Edward Randolph.<br>A copy of this image is on exhibit. |
| 2. *What image information prints on the catalog record?* | The program prints the most recent image number in the Photo Number field on the NPS Form 10-254 and DOI CR/NH Museum Catalog Record. |

# X. LOANS IN SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Loans In supplemental record?*

Use the Loans In supplemental record to attach incoming loan information to individual catalog records.

*2. Where is the incoming loan information located?*

You enter information about the incoming loan in the Loans In associated module. This module is linked to the Loans In supplemental record. See Section V of Chapter 4 for information on the Loans In associated module.

*3. What is the difference between the Loans In associated module and the Loans In supplemental?*

The Loans In associated module contains all the information about a loan. It includes fields such as the name of the lender and the insurance policy number. You can print the loan forms from this module.

The Loans In supplemental record connects an individual catalog record to the incoming loan information in the Loans In associated module. The connecting field is the Loan ID number. The supplemental record contains only a few fields, such as the start and end dates for the loan. You cannot print loan forms from the supplemental record.

*4. Do I have to enter loan information in both the Loans In associated module and the Loans In supplemental record?*

No. You don't have to enter information in both places. The program will automatically complete the Loans In supplemental record from the information you enter in the Loans In associated module. You can complete a supplemental record by entering the data manually, but this method is not recommended.

*5. What is the purpose of the Loans In supplemental record?*

The Loans In supplemental record allows you to look at loan information without exiting the catalog record. The supplemental record can also provide a history of loan activity for the object.

*6. Must I create a Loans In supplemental record?*

No. The program will create the record for you when you complete the Loans In associated module and attach catalog records to it. To track incoming loans, you must complete an incoming loan record in the Loans In associated module.

## B. Adding a Loans In Supplemental Record

*1. What do I need to do to have the program automatically complete the supplemental record?*

***You must create catalog records for the objects in the incoming loan before you can use this feature. For NPS, you do not have to catalog incoming loans that you keep for less than one year.***

There are two ways to complete the supplemental record from the catalog record.

For a single catalog record:

- Go to the Supplemental Information tab and select the Loans In supplemental.
- Click Add to enter a new supplemental record.
- In the Loan ID field, press F5 or click the Loans In icon to view and select from the list of loan records.

- To add a new loan record, press Ctrl-F5 in the Loan ID field and click Add.

- The Loans In associated module screen will appear. Complete the incoming loan information. Refer to Section V of Chapter 4 for completing the incoming loan record. The record you add will appear in the list.

- Click Select to enter the Loan ID in the supplemental.

- When you tab out of the Loan ID field, the remaining supplemental fields will automatically complete from the incoming loan record.

- Click Save and Close.

To add the same Loans In supplemental to a group of records, use the Mass Supplemental Update function described in Section I.E above.

The program will automatically attach the catalog record(s) to the loan record in the Loans In associated module and create the Loans In supplemental record.

The fields will carry over as follows:

| **Associated Module Fields** | **Supplemental Fields** |
|---|---|
| Accession Number | Loan ID |
| Status | Status |
| Start Date | Start Date |
| End Date | End Date |
| Loan Desc | Notes |

2. *Can I manually complete the data fields on the Loans In supplemental record?*

Yes. When adding a supplemental record, you can change the data by choosing "Manually update value" from the pull down next to the supplemental field. However, the data that you insert or modify do not transfer back to the Loans In associated module or the catalog record. It is much easier to have the program create the record for you.

If you want to modify an existing supplemental, highlight the supplemental and click Edit. All fields will be available for updating manually. If the program has automatically created the Loans In supplemental record, you should only modify the Notes field.

If for some reason, you need to modify data in a Loans In supplemental record, complete the fields as follows:

*Loan ID*

User-built table (F5, Ctrl-F5) that connects to the Loans In associated module.

Enter the loan identification number. The National Park Service treats incoming loans as accessions. Other bureaus may or may not, according to their own policy. You must assign an accession or loan ID number to the loan. This number serves as the loan identification number.

For the NPS, the number consists of the four-letter park acronym, a dash, and a number.

For DOI, this is a regular, unedited, 20-character field. Enter a loan ID number according to your policy.

As you type, the entry will complete from the authority table of Loan IDs. Press F5 or click the Loans In icon to view and select an incoming loan record from the list.

**Note**: You can add and edit incoming loan records by pressing Ctrl-F5 or right-click and select Browse Authority Table. Click Add to enter a new incoming loan or select a record in the list and click Edit.

*Status*

Bureau controlled table (F5).

Enter the status of the loan. Choose from the three entries: active, converted to gift, pending, and returned.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

*Start Date*

Date field.

Enter the starting date for the loan. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 2/9/1999

*End Date*

Date field.

Enter the termination date for the loan. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 10/1/1999

*Notes*

Memo field.

Enter any additional information about the loan.

# XI. LOANS OUT SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Loans Out supplemental record?*

Use the Loans Out supplemental record to attach outgoing loan information to individual catalog records.

*2. Where is the outgoing loan information located?*

You enter information about outgoing loans in the Loans Out associated module. This module is linked to the Loans Out supplemental record. See Section IV of Chapter 4 for information on the Loans Out associated module.

*3. What is the difference between the Loans Out associated module and the Loans Out supplemental record?*

The Loans Out associated module contains all the information about a loan. It includes fields such as the name of the borrower and the insurance policy number. You can print the loan forms from this module.

The Loans Out supplemental record connects an individual catalog record to the outgoing loan information in the Loans Out associated module. The connecting field is the Loan ID number. The supplemental record contains only a few fields, such as the start and end dates for the loan. You cannot print loan forms from the supplemental record.

*4. Do I have to enter loan information in both the Loans Out associated module and the Loans Out supplemental record?*

No. You don't have to enter information in both places. The program will automatically complete the Loans Out supplemental record from the information you enter in the Loans Out associated module. You can complete a supplemental record by entering the data manually, but this method is not recommended.

*5. What is the purpose of the Loans Out supplemental record?*

The Loans Out supplemental record allows you to look at loan information without exiting the catalog record. The supplemental record can also provide a history of loan activity for the object. It shows the number of times an object was placed on loan and the dates of the loans.

*6. Must I create a Loans Out supplemental record?*

No. The program will create the record for you when you complete the Loans Out associated module and attach catalog records to it. To loan objects, you must complete an outgoing loan record in the Loans Out associated module.

*7. Does the Loans Out supplemental record update the Object Status field on the catalog record?*

Yes. If you use the Mass Supplemental Update function (see Section I.E above) or attach the catalog record through the Loans Out associated module record, you have the option to update the Object Status, Location and Status Date fields at the same time.

However, if you add the Loans Out supplemental record to a single catalog record from the Supplemental Information page, it does not update the Object Status or Status Date fields. You must manually update these fields on the catalog record.

## B. Adding a Loans Out Supplemental Record

*1. What do I need to do to have the program automatically complete the supplemental record?*

There are two ways to complete the supplemental record from the catalog record.

For a single catalog record:

- Go to the Supplemental Information tab and select the Loans Out supplemental.

- Click Add to enter a new supplemental record.
- In the Loan ID field, press F5 or click the Loans Out icon to view and select from the list of loan records.
- To add a new loan record, press Ctrl-F5 in the Loan ID field and click Add.
- The Loans Out associated module screen will appear. Complete the outgoing loan information. Refer to Section IV of Chapter 4 for completing the outgoing loan record. The record you add will appear in the list.
- Click Select to enter the Loan ID in the supplemental.
- When you tab out of the Loan ID field, the remaining supplemental fields will automatically complete from the outgoing loan record.
- Click Save and Close.

To add the same Loans Out supplemental to a group of records, use the Mass Supplemental Update function described in Section I.E above.

The program will automatically attach the catalog record(s) to the loan record in the Loans Out associated module and create the Loans Out supplemental record.

The fields will carry over as follows:

| **Associated Module Fields** | **Supplemental Fields** |
|---|---|
| Loan ID | Loan ID |
| Status | Status |
| Start Date | Start Date |
| End Date | End Date |
| Loan Desc | Notes |

*2. Can I manually complete the data fields on the Loans Out supplemental record?*

Yes. When adding a supplemental record, you can change the data by choosing "Manually update value" from the pull down next to the supplemental field.

If you want to modify an existing supplemental, highlight the supplemental and click Edit. All fields will be available for updating manually. If the program has automatically created the Loans Out supplemental record, you should only modify the Notes field.

***Manually completing a record can cause inconsistencies in your records. The data that you insert or modify do not transfer back to the Loans Out associated module or the catalog record. It is much easier to have the program create the record for you as described in B.1.***

If for some reason you need to modify data in a Loans Out supplemental record, complete the fields as follows:

*Loan ID*

User-built table (F5, Ctrl-F5)

Enter the loan identification number. The number consists of an L (outgoing loan indicator), the calendar year (four digits), and the number (assigned sequentially within the calendar year).

Example: L.2005.12

**Note**: Centers can add a unit acronym after the transaction number.
Example: L.2004.01.UNIT

As you type, the entry will complete from the authority table of Loan IDs. Press F5 or click the Loans Out icon to view and select an outgoing loan record from the list.

You can add and edit outgoing loan records by pressing Ctrl-F5 or right-click and select Browse Authority Table. Click Add to enter a new outgoing loan or select a record in the list and click Edit.

**Note:** If you edit an existing loan record in this manner, the modified information will not automatically update the supplementals for other catalog records that are already attached to this loan record. The Mass Supplemental update function is a better choice for updating an existing loan record and the catalog records attached. See Section I.E above.

*Status*

Bureau controlled table (F5).

Enter the status of the loan. Choose from the three entries: active, converted to gift, pending and returned.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

*Start date*

Date field.

Enter the starting date for the loan. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 2/9/1999

*End Date*

Date field.

Enter the termination date for the loan. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 10/1/1999

*Notes*

Memo field.

Enter any additional information about the loan.

# XII. LOCATION SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Location supplemental record?*

Use the Location supplemental record to document and track changes in the object's location.

*2. What is the purpose of the Location supplemental record?*

The Location supplemental record provides you with a history of an object's location. It allows you to see on one screen various changes in location that have occurred over a period of time. It shows:

- reason for the location
- name of the person who authorized the location entry or logger ID
- start date for the location
- end date for the location
- physical location

*3. Must I create a Location supplemental record?*

No, but taking advantage of this feature in the program is recommended. When you add or modify the location field in a catalog record, the program prompts you for the information needed to create the supplemental record and then creates it for you.

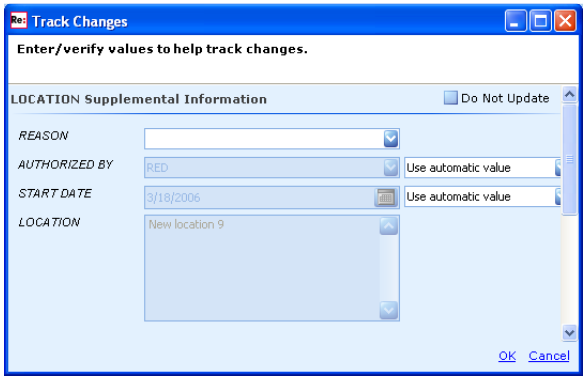
*4. Can I do a mass location update that creates a Location supplemental record for all the objects in the update?*

Yes. When you do a Modify All and change the location field, the program prompts you to complete the Location supplemental through the Track Changes window. This will add the Location supplemental to all the records that you update. See Chapter 6, Section IX for information on Modify All.

## B. Adding a Location Supplemental Record

*1. How does the Location supplemental work?*

The program creates the Location supplemental record from the information you enter when you save the catalog record. When you save a catalog record after completing or changing the Location field, the Location supplemental is included in the Track Changes window. You should enter a reason for the location. The program enters the Authorized By from the logger ID and date, although you can edit these fields by choosing "Manually update value" next to each field. The entry from the location field is also entered automatically, but you cannot edit this field.




This information becomes an entry in the Location supplemental record. Each additional change in object location is recorded as another entry in the

supplemental record. The start date for one entry becomes the end date for the previous entry.

**Note**: If you choose to not update the location supplemental (by checking Do Not Update in the Track Changes window), there will not be an entry in the Location supplemental record.

*2. How do I complete the Reason field in the location supplemental?*

Instructions for completing the prompt fields are also available in each section of Chapter 2, Cataloging.

*Reason*

User-built table (F5, Ctrl-F5)

Enter the reason for the location.

Example: Storage
Summer Exhibit

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*3. Can I go into the supplemental record and make an entry on the screen?*

Yes. You can add, modify or delete Location supplemental entries by going to the Supplemental Information page on the catalog record, and selecting the Location supplemental. Then click Add to append another entry, or select a record in the list and click Edit or Delete.

**Note**: The data that you insert or modify does not transfer back to the catalog record, which can cause inconsistencies in your records. It is much easier to have the program create the record for you.

If you want to make a comment about an error or an entry in another field, use the Location memo field.

Example: Reason for the location is incorrect. The entry should be Permanent Storage.

You can also use Mass Supplemental Update to add or modify the same supplemental on a group of records. When updating, it matches the Reason, Start Date, End Date and Location fields in the supplemental so that only the same supplementals are updated in the catalog records.

If, for some reason, you need to create or modify a Location supplemental record, complete the fields as follows:

*Reason*

User-built table (F5, Ctrl-F5).

Enter the reason for the location.

Example: Conservation
Exhibit

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

**Note:** If you enter "Permanent" in the Reason field, you can print an Object Temporary Removal Slip, Form 10-97, when you temporarily move the object. See Chapter 5, Section C.

*Authorized By*

User-built table (F5, Ctrl-F5)

Enter the name of the person, last name first, who authorized the location entry. The table for this entry is the same as the table for the Cataloger field in the catalog record.

Example: Brown, John

As you type, the word will complete from an authority table of cataloger names. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Start Date*

Date field.

Enter the starting date for the object location. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 3/17/2006

*End Date*

Date field.

Enter the ending date for the object location. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 6/30/2006

*Location*

Memo field.

Enter the actual location and any additional information about the object's location.

**Note**: Information that you add to the supplemental record does not transfer back to the catalog record.

Example: BLDG 10 RM 3 C5
This case requires a 1/4" Phillips screwdriver to open.

# XIII. MAINTENANCE SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Maintenance supplemental record?*

Use the Maintenance supplemental record to view, add, update, or delete a maintenance record for an object. The maintenance record documents and tracks ongoing and routine maintenance work on objects.

**Note**: Use the Maintenance supplemental record for Cultural Resources (CR) records only.

*2. Where is the maintenance information located?*

You enter information about maintenance in the Maintenance associated module. This module is linked to the Maintenance supplemental record. See Section VI of Chapter 4 for information on the Maintenance associated module.

*3. What is the difference between the Maintenance associated module and the Maintenance supplemental record?*

The Maintenance associated module contains all the information about a maintenance task. It includes fields such as purpose, task, frequency and equipment.

The Maintenance supplemental record links an individual catalog record to the information in the Maintenance associated module. The linking field is the Catalog Number. The supplemental record displays only two fields: due date, and purpose.

*4. Do I have to enter maintenance information in both the Maintenance associated module and the Maintenance supplemental record?*

No. You do not enter information in both places. The program will automatically complete the supplemental record from the information you enter in the Maintenance associated module. The fields in the Maintenance supplemental record cannot be edited except by adding or modifying the Maintenance associated module record.

***You create some maintenance records to produce museum housekeeping plan task sheets and tracking schedules. These records are not associated with specific objects, and do not produce supplemental records.***

*5. What is the purpose of the Maintenance supplemental record?*

The Maintenance supplemental record allows you to view, add, update, or delete maintenance information without exiting the catalog record.

**Note:** You can also print the list of maintenance supplementals associated with a catalog record. The print option on the supplemental tab is only available on supplementals that are linked to the associated module record by the Catalog Number only. All other supplemental types can be included on quick reports.

*6. Must I create a Maintenance supplemental record?*

No. Use of this feature is optional. You may not have maintenance tasks for every object.

## B. Adding a Maintenance Supplemental Record

*1. What do I need to do to have the program automatically complete the supplemental record?*

In the Maintenance associated module, enter the catalog number of the object that requires maintenance. The Catalog Number field links the Maintenance associated module to the catalog record. When you save a record in the Maintenance associated module, the program creates/updates the Maintenance supplemental record for the catalog record.

2. *How do I add, update, view or delete a maintenance record in the Maintenance associated module?*

The Maintenance supplemental record allows you to add, view, edit and delete a maintenance record in the Maintenance associated module without leaving the catalog record. When you select the Maintenance supplemental on a catalog record and click add, edit, or view, the Maintenance associated module screen will appear in the mode you selected (add, modify, view).

If you are adding or modifying a maintenance record, complete the maintenance screen as described in Section VI of Chapter 4.

If you are deleting the maintenance record, the system will ask if you are sure you want to delete the selected maintenance record which includes both the supplemental and the Maintenance associated module record.

3. *Can I use the Mass Supplemental Update function to add or modify the Maintenance supplemental record?*

No. The maintenance record is a one to one relationship with the catalog record based on the catalog number. You cannot attach a group of records to a single maintenance record. These must be added or modified individually.

# XIV. OBJECT STATUS SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Object Status supplemental record?*

Use the Object Status supplemental record to document and track changes in the status of the object. Object status refers to the state of an object, such as whether it is on exhibit or in storage.

*2. What is the purpose of the Object Status supplemental record?*

The Object Status supplemental record provides a history of an object's status. It allows you to see, on one screen, various changes in status that have occurred over a period of time. It shows you:

- status of the object
- reason for the status
- name of the person who authorized the status or logger ID
- year and start date for the status
- end date for the status
- notes on the status

***The program uses the Object Status supplemental record to calculate data for the Collection Management Report (CMR). Refer to Appendix E: CMR.***

*3. Must I create an Object Status supplemental record?*

No. The program automatically creates this record for you.

## B. Adding an Object Status Supplemental Record

*1. How does the Object Status supplemental work?*

The program creates the Object Status supplemental record from the information you enter on the catalog record. When you save a catalog record after completing or changing the Object Status field, the program copies the following data to the Object Status supplemental record:

- the object status and status year from the corresponding fields on the catalog record
- the logger ID as the name of the person authorizing the entry
- the date the entry was made in the computer as the start date

**Note**: The program enters "Status Change" in the Reason field when it updates a record. You can edit this field, if needed.

This information becomes an entry in the Object Status supplemental record. Each additional change in object status is recorded as another entry in the supplemental record.

The Start date of the new entry becomes the End date for the previous Object Status supplemental record.

*2. What modifications should I make to an Object Status supplemental record that the program has created?*

You may want to add a reason for the status and additional notes on the status. These entries are optional. You should not edit any other fields.

The only fields you should modify are Reason and Notes.

*3. Can I go into the supplemental record and add an entry?*

Yes. On the Supplemental Information page of the catalog record, select the Object Status supplemental and click Add above the supplemental list. The data that you insert or modify do not transfer back to the catalog record, which can cause inconsistencies in your records. It is much easier to have the program create the record for you.

If you want to make a comment about an error or an entry in another field, use the Notes field.

If, for some reason, you need to create or modify an Object Status supplemental record, complete the fields as follows:

*Status*

Bureau locked table (F5).

Enter the current status of the object. Choose from the options in the table.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

*Reason*

User-built table (F5, Ctrl-F5)

Enter the reason for the status.

Example: Conservation

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Authorized by*

User-built table (F5, Ctrl-F5)

Enter the name of the person, last name first, who authorized the status entry. The table for this entry is the same as the table for the Cataloger field on the catalog record.

Example: Brown, John

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Status Year*

Numeric field.

Enter a four-digit year. This is the fiscal year in which the status took effect. The fiscal year runs from October 1 to September 30.

Example: 2005

*Start Date*

Date field.

Enter the date the object status took effect. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 3/12/2005

**Note:** To remove a date from the field, press Ctrl-Delete.

*End Date*

Date field.

Enter the end date for the object status. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 8/5/2006

**Note:** To remove a date from the field, press Ctrl-Delete.

*Notes*

Memo field.

Enter any additional information about the object status.

Example: Basket sent for conservation work. It will be on loan for 6 months and will be placed on exhibit when it returns.

# XV. PREPARATION/TREATMENT SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Preparation/Treatment supplemental record?*

Use the Preparation/Treatment supplemental record to view, add, update, or delete a preparation/treatment record for a specimen. The preparation/treatment record documents and tracks initial preparation and ongoing, routine treatment.

**Note:** Use the Preparation/Treatment supplemental record for Natural History (NH) records only.

*2. Where is the preparation/treatment information located?*

You enter information about preparation and treatment in the Preparation/Treatment associated module. This module is linked to the Preparation/Treatment supplemental record. See Section VII of Chapter 4 for information on the Preparation/Treatment associated module.

*3. What is the difference between the Preparation/ Treatment associated module and the Preparation/ Treatment supplemental record?*

The Preparation/Treatment associated module contains all the information about the preparation and treatment of a specimen. It includes fields such as Materials and Preparator.

The Preparation/Treatment supplemental record links an individual catalog record to the information in the Preparation/Treatment associated module. The linking field is the Catalog Number. The supplemental record contains only the due date and field observation.

*4. Do I have to enter preparation/treatment information in both the Preparation/Treatment associated module and the Preparation/Treatment supplemental record?*

No. You do not enter information in both places. The program will automatically complete the Preparation/Treatment supplemental record from the information you enter in the Preparation/Treatment associated module. The fields in the Preparation/Treatment supplemental record cannot be edited except by adding or modifying the Preparation/Treatment associated module record.

*5. What is the purpose of the Preparation/Treatment supplemental record?*

The Preparation/Treatment supplemental record allows you to view, add, update, or delete preparation and treatment information without exiting the catalog record.

**Note:** You can also print the list of preparation/treatment supplementals associated with a catalog record. The print option on the supplemental tab is only available on supplementals that are linked to the associated module record by the Catalog Number only. All other supplemental types can be included on quick reports.

*6. Must I create a Preparation/Treatment supplemental record?*

No. Use of this feature is optional. You may not have preparation/ treatment information for every specimen.

## B. Adding a Preparation/Treatment Supplemental Record

*1. What do I need to do to have the program automatically complete the supplemental record?*

In the Preparation/Treatment associated module, enter the catalog number of the specimen that requires or that received preparation or treatment. The Catalog Number field links the Preparation/Treatment associated module to the catalog record. When you save a record in the Preparation/Treatment associated module, the program creates/updates the Preparation/Treatment supplemental record for the catalog record.

2. *How do I add, update, view, or delete a preparation/treatment record in the Preparation/ Treatment associated module?*

The Preparation/Treatment supplemental record allows you to add, view, edit and delete a preparation/treatment record in the Preparation/Treatment associated module without leaving the catalog record. When you select the Preparation/Treatment supplemental on a catalog record and click add, edit, or view, the Preparation/Treatment associated module screen will appear in the mode you selected (add, modify, view).

If you are adding or modifying a preparation/treatment record, complete the Preparation/Treatment screen as described in Section VIII of Chapter 4.

If you are deleting the preparation/treatment record, the system will ask if you are sure you want to delete the selected preparation/treatment record which includes both the supplemental and the Preparation/Treatment associated module record.

3. *Can I use the Mass Supplemental Update function to add or modify a Preparation/Treatment supplemental record?*

No. The preparation/treatment record is a one to one relationship with the catalog record based on the catalog number. You cannot attach a group of catalog records to a single preparation/treatment record. These must be added or modified individually.

# XVI. PRESERVATION SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Preservation supplemental record?*

Use the Preservation supplemental record to document and track proposed or completed preservation treatments for an object. The supplemental record will provide a history of preservation treatment.

*2. What information does the Preservation supplemental record contain?*

The Preservation supplemental record includes:

- treatment provider
- treatment priority
- year of treatment
- notes

*3. Must I create a Preservation supplemental record?*

No. Use of this feature is optional. You will not have preservation treatment for all objects in the collection.

## B. Adding a Preservation Supplemental Record

*1. How do I complete an entry in the Preservation supplemental record?*

You can add, edit or delete a supplemental record from the Supplemental Information page on the catalog record. You can also use the Mass Supplemental Update function on groups of records (see Section I.E above).

Complete entries to the Preservation supplemental record as follows:

*Treatment By*

User-built table (F5, Ctrl-F5).

Enter the type of treatment provider. The program provides the following entries:

C for Contractor (use also for cooperators)
P for Park Staff
R for NPS Center
S for Surveyed/Not Treated

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

**Note:** You can also enter the name of the person who treated the object.

*Priority*

User-built table (F5, Ctrl-F5)

Enter the priority level for treatment of the object.

Example: High
Medium
Low

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Year*

Numeric field.

Enter the four digit year in which treatment was completed.

Example: 1997

**Note:** If treatment has not yet been completed, modify the record after treatment to include the year.

*Notes*

Memo field.

Enter information about completed treatment or additional treatment needs.

*2. What preservation treatment information prints on the catalog record?*

The NPS Form 10-254 and DOI CR/NH Museum Catalog Record contain a one-character Preservation Treatment field.

| **If there is...** | **Then the system...** |
|---|---|
| information in the Preservation Treatment supplemental record, | prints a "Y" in the Preservation Treatment field on the NPS Form 10-254 or the DOI CR/NH Museum Catalog Record. |
| no information in the Preservation Treatment supplemental record, | prints "N" in the Preservation Treatment field on the NPS Form 10-254 or the DOI CR/NH Museum Catalog Record |

# XVII. PROVENANCE SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Provenance supplemental record?*

Use the Provenance supplemental record to document and track the ownership of an object. The supplemental record will provide a history of ownership.

*2. What information does the Provenance supplemental record contain?*

The Provenance supplemental record includes:

- country and state/province of ownership
- owner name
- dates of ownership
- notes

*3. Must I create a Provenance supplemental record?*

No. Use of this feature is optional. You may not have provenance information for all objects.

## B. Adding a Provenance Supplemental Record

*1. How do I complete an entry in the Provenance supplemental record?*

You can add, edit or delete a supplemental record from the Supplemental Information page on the catalog record. You can also use the Mass Supplemental Update function on groups of records (see Section I.E above).

Complete entries to the Provenance supplemental record as follows:

*Country*

User-built table (F5, Ctrl-F5).

Enter the name of the country (usually a politically defined entity) where the object was owned.

Example: United States
Spain

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*State/Prov*

User-built table (F5, Ctrl-F5).

Enter the name of the state or province where the object was owned.

Example: California
Quebec

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Owner*

User-built table (F5, Ctrl-F5).

Enter the name of the person or institution that owned the object.

Example: Priscilla McKee
Valentine Museum

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*From*

Date field.

Enter the beginning date for the period of ownership. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 1/12/1988

**Note:** To remove a date from the field, press Ctrl-Delete.

*To*

Date field.

Enter the ending date for the period of ownership. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 2/9/1997

**Note:** To remove a date from the field, press Ctrl-Delete.

*Notes*

Memo field.

Record additional information on the history of ownership.

Example: This painting was exhibited at the Chicago Historical Society in an exhibit titled "River Riders of the Plains" in 1955.

# XVIII. PUBLICATION CITATION SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Publication Citation supplemental record?*

Use the Publication Citation supplemental record to note publications that cite or illustrate the object.

*2. What information does the Publication Citation supplemental record contain?*

The Publication Citation supplemental record includes:

- title of the publication
- page reference
- plate reference
- reference citation

*3. Must I create a Publication Citation supplemental record?*

No. Use of this feature is optional. You will not have citations for all objects in the collection.

*4. How are entries ordered in the Publication Citation supplemental record?*

Entries appear on the screen in progressive order (the order in which you enter them).

**Note**: The Publication Citation supplemental can also be accessed from the discipline tab for Archeology, Biology, Geology, and Paleontology catalog records when the Figured Specimen field is 'Yes'. The field label for this field becomes an active link that will take you to the Publication Citation supplemental records directly.

## B. Adding a Publication Citation Supplemental Record

*1. How do I complete an entry in the Publication Citation supplemental record?*

You can add, edit or delete a supplemental record from the Supplemental Information page on the catalog record. You can also use the Mass Supplemental Update function to attach a supplemental to a group of records (see Section I.E above).

Complete entries to the Publications Citation supplemental record as follows:

*Title*

User-built table (F5, Ctrl-F5).

Enter the title of the publication.

Example: National Geographic

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

**Note:** When you add Titles to the authority table, you should include the full citation in the Extended Description field of the table entry. This information along with the page and plate will autofill into the Reference field of the supplemental when you tab to that field.

*Page*

Straight entry field.

Enter the page number(s) of the citation.

Example: 8-10

*Plate*

Straight entry field.

Enter the plate number(s) included in the citation.

Example: Ia and IIc

*Reference*

Formatted memo field (F12). The field will also expand as you type or you can click the paper icon on the field. The field expands into two memo fields: Reference and Notes.

***Reference (memo field)***
Enter a full bibliographic citation. The program transfers the full citation from the title authority table entry extended description, the page and plate numbers to this field automatically.

***Notes (memo field)***
Enter additional notes on the citation.

*2. What publication citation information prints on the catalog record?*

The NPS Form 10-254 and the DOI CR/NH Museum Catalog Record contain a one-character Publication Citation field.

| **If there is...** | **Then the system...** |
|---|---|
| information in the Publication Citation supplemental record, | prints a "Y" in the Publication Citation field on the NPS Form 10-254 or the DOI CR/NH Museum Catalog Record. |
| no information in the Publication Citation supplemental record, | prints a "N" in the Publication Citation field on the NPS Form 10-254 or the DOI CR/NH Museum Catalog Record. |

# XIX. RELATED DATABASES SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Related Databases supplemental record?*

Use the Related Databases supplemental record to document other databases or programs related to the object.

**Note:** The Related Databases supplemental record does not function as a direct link to the other databases.

*2. What information does the Related Databases supplemental record contain?*

The Related Databases supplemental record includes:

- type or name of the related database
- a number that connects the object to the related database
- notes

**Note:** The Related Databases supplemental record contains data from the following ANCS fields:

Cultural Sites Inventory Number (CSI#)
List of Classified Structures ID Number (LCS#)
List of Classified Structures Type
Code 1
Code 2
Link 1
Link 2

The name of the field was converted into the Type field of the Related Databases supplemental record. The number was converted into the Related # field of the Related Databases supplemental record.

*3. Must I create a Related Databases supplemental record?*

No. Use of this feature is optional. You may not have related databases for all objects in a collection.

*4. How are entries ordered in the Related Databases supplemental record?*

Entries appear on the screen in progressive order (the order in which you enter them).

## B. Adding a Related Databases Supplemental Record

*1. How do I complete an entry in the data fields on the Related Databases supplemental record?*

You can add, edit or delete a supplemental record from the Supplemental Information page on the catalog record. You can also use the Mass Supplemental Update function to attach a supplemental to a group of records (see Section I.E above).

Complete entries to the Related Databases supplemental record as follows:

*Type*

User-built table (F5, Ctrl-F5).

Enter the name of the related database.

Example: NAGPRA
List of Classified Structures (LCS)
GIS

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Related #*

Straight entry field.

Enter the number that connects the object to the related database.

*Notes*

Memo field.

Record additional information about the related database, such as how to access it.

# XX. RESEARCH NOTES SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Research Notes supplemental record?*

Use the Research Notes supplemental record to record research information about an object. This may include research that you conducted while cataloging the object or notes from another researcher.

*2. What information does the Research Notes supplemental record contain?*

The Research Notes supplemental record includes:

- researcher name
- date of research
- notes

*3. Must I create a Research Notes supplemental record?*

No. Use of this feature is optional. You may not have research notes for all objects in a collection.

## B. Adding a Research Notes Supplemental Record

*1. How do I complete an entry in the data fields on the Research Notes supplemental record?*

You can add, edit or delete a supplemental record from the Supplemental Information page on the catalog record. You can also use the Mass Supplemental Update function to attach a supplemental to a group of records (see Section I.E above).

Complete entries to the Research Notes supplemental record as follows:

*Researcher*

User-built table (F5, Ctrl-F5).

Enter the name of the researcher. The table for this entry is the same as the table for the Cataloger field in the catalog record.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Date*

Date field.

Enter the date when the research was conducted. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 2/9/2006

**Note:** To remove a date from the field, press Ctrl-Delete.

*Notes*

Memo field.
Enter notes on the research.

# XXI. RESTRICTIONS SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Restrictions supplemental record?*

Use the Restrictions supplemental record to attach information about use and access restrictions to individual catalog records.

*2. Where is the restrictions information located?*

You enter information about restrictions in the Restrictions associated module. This module is linked to the Restrictions supplemental record. See Section IX of Chapter 4 for information on the Restrictions associated module.

*3. What is the difference between the Restrictions associated module and the Restrictions supplemental record?*

The Restrictions associated module contains all the information about a restriction. It includes fields to fully describe the type of restriction.

The Restrictions supplemental record connects an individual catalog record to the restriction information in the Restrictions associated module. The connecting field is the Restriction Number. The supplemental record contains only two fields: Restriction Number and Notes.

*4. Do I have to enter restriction information in both the Restrictions associated module and the Restrictions supplemental record?*

No. You don't have to enter information in both places. The program will automatically complete the Restrictions supplemental record from the information you enter in the Restrictions associated module. You can complete a supplemental record by entering the data manually, but this method is not recommended.

*5. What is the purpose of the Restrictions supplemental record?*

The Restrictions supplemental record allows you to see restriction information without exiting the catalog record.

*6. Must I create a Restrictions supplemental record?*

No. The program will create the record for you when you complete the Restrictions associated module and attach catalog records to it. Use of this feature is optional. You will not have restrictions on all objects in a collection. However, it is very important to be aware of the restrictions on your collection.

*7. How are entries ordered in the Restrictions supplemental record?*

Entries appear on the screen in progressive order (the order in which you enter them).

## B. Adding a Restrictions Supplemental Record

*1. What do I need to do to have the program automatically complete the supplemental record?*

There are two ways to complete the supplemental record from the catalog record.

For a single catalog record:

- Go to the Supplemental Information tab and select the Restrictions supplemental.
- Click Add to enter a new supplemental record.
- In the Restr Nbr field, press F5 or click the Restriction icon to view and select from the list of restriction records.

- To add a new restriction record, press Ctrl-F5 in the Restr Nbr field and click Add.

- The Restriction associated module screen will appear. Complete the restriction information. Refer to Section IX of Chapter 4 for completing the restriction record. The record you add will appear in the list.

- Click Select to enter the Restr Nbr in the supplemental.

- When you tab out of the Restr Nbr field, the remaining supplemental fields will automatically complete from the restriction record.

- Click Save and Close.

To add the same Restriction supplemental to a group of records, use the Mass Supplemental Update function described in Section I.E above.

The program will automatically attach the catalog record(s) to the restriction record in the Restrictions associated module and create the Restrictions supplemental record.

The fields will carry over as follows:

| **Associated Module Fields** | **Supplemental Fields** |
|---|---|
| Restriction Number | Restriction Number |
| Access | Notes |

**Note:** Access restrictions carry over to the Notes field in the supplemental record. This allows you to see access restrictions without having to go to the Restrictions associated module.

*2. What restriction information prints on the catalog record?*

The NPS Form 10-254 and the DOI CR/NH Museum Catalog Record contain a one-character Restriction field.

| If there is... | Then the system... |
|---|---|
| information in the Restrictions supplemental record, | prints a "Y" in the Restriction field on the NPS Form 10-254 or the DOI CR/NH Museum Catalog Record. |
| no information in the Restrictions supplemental record, | prints a "N" in the Restriction field on the NPS Form 10-254 or the DOI CR/NH Museum Catalog Record. |

*3. Can I manually complete the data fields on the Restrictions supplemental record?*

Yes. When adding a supplemental record, you can change the data by choosing “Manually update value” from the pull down next to the supplemental field. However, the data that you insert or modify do not transfer back to the Restrictions associated module or the catalog record. It is much easier to have the program create the record for you.

If you want to modify an existing supplemental, highlight the supplemental and click Edit. All fields will be available for updating manually.

If for some reason, you need to modify data in a Restrictions supplemental record, complete the fields as follows:

*Restriction Number (Restr Nbr)*

User-built table (F5, Ctrl-F5).

Enter a number for the restriction. You may choose this number locally.

As you type, the entry will complete from the authority table of restriction numbers. Press F5 or click the restriction icon to view and select an exhibit record from the list.

**Note**: You can add and edit restriction records by pressing Ctrl-F5 or right-click and select Browse Authority Table. Click Add to enter a new restriction or select an entry and click Edit.

*Notes*

Memo field.

Enter any notes on the restriction.

Example: Due to its fragility, access to this type specimen is restricted.

# XXII. SCIENTIFIC NAME SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Scientific Name supplemental record?*

Use the Scientific Name supplemental record to document and track changes in the scientific name and the person who identified the specimen.

The Scientific Name supplemental record will track:

- changes in the name of the specimen and identifier

Example: Populus trichocarpa identified by Dr. Eugene Nelson 03/24/1975 re-identified as Populus balsamifera var. trichocarpa by Dr. Anna Matthews 11/22/1996.

- verification of the scientific name by a different expert

Example: Poa pratensis identified by Dr. Eugene Nelson 03/24/1975 re-verified with the scientific name Poa pratensis by Dr. William E. Moore 01/12/1997.

- changes in the scientific name made by the same expert who previously identified the specimen

Example: Populus trichocarpa identified by Dr. William E. Moore 10/06/1990 re-identified as Populus balsamifera var. trichocarpa by Dr. William E. Moore 08/03/1997.

**Note:** This supplemental record is available for Natural History (NH) records only.

*2. What is the purpose of the Scientific Name supplemental record?*

The Scientific Name supplemental record provides a history of scientific name identification. It allows you to see, on one screen, the various changes in scientific name identification that have occurred over a period of time. It shows you:

- name of the person who made the identification
- date of identification
- reason for the change
- scientific name

*3. Must I create a Scientific Name supplemental record?*

No, but taking advantage of this feature in the program is recommended. The program prompts you for the information needed to create the record and then creates the record for you.

**Note:** The information in this supplemental record is essential for scientific research.

## B. Adding a Scientific Name Supplemental Record

*1. How does the Scientific Name supplemental record work?*

The program creates the Scientific Name supplemental record from the information you enter when you save the catalog record. When you save a catalog record after completing or changing the Scientific Name, Identified By, or Identified Date fields, the Scientific Name supplemental information is included in the Track Changes window. You should enter the reason for the name or change in name. The scientific name, identifier, and

identification date are automatically entered. This information becomes an entry in the Scientific Name supplemental record. Each additional change in the Scientific Name, Identified By, and Identified Date fields is recorded as another entry in the supplemental record.

**Note:** If you choose to not update the scientific name supplemental by checking Do Not Update in the Track Changes window, there will not be an entry in the Scientific Name supplemental record.

*2. How do I complete the Scientific Name supplemental information?*

Instructions for completing the supplemental fields are also available in each section of Chapter 2, Cataloging.

Complete the subfields as follows:

*Scientific*

Formatted memo. Press F12 or click on the formatted memo icon to expand the field. The field will also expand as you type. It will expand into 4 subfields as follows:

**Note:** If you are in the Track Changes window, you must first change the update option next to the field to "Manually update value".

***ID By (user-built stacked table, F5, Ctrl-F5, F12)***
This links to the Names and Addresses associated module.

**Note:** In Track Changes, this field will probably already contain an entry.

Enter the full name of the person, last name first, who identified the specimen.

Example: MOORE, DR. WILLIAM E.

As you type, the word will complete from an authority table of names in the Names and Addresses associated module. Press the F5 key or click the person icon to view and select names from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right-click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The Names and Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can then select it from the table.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash - - separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

***ID Date (Flexible date field)***

**Note**: In Track Changes, this field will probably already contain an entry.

Enter the date that the identifier verified or changed the scientific name. Enter a numeric month, a numeric day, and the full year.

Example: 10/2/1995

***Reason (Memo field)***

Enter the reason for the change.

Example: annotation
misidentification

***Scientific Nm (Memo field)***

**Note:** In Track Changes, this field will probably already contain an entry.

Enter the scientific name for the specimen.

Example: *Populus balsamifera var. trichocarpa*

# XXIII. SIGNIFICANCE SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Significance supplemental record?*

Use the Significance supplemental record to document and track the significance of an object.

***Significance criteria are currently under development. Do not use this supplemental record until criteria are available.***

*2. What information does the Significance supplemental record contain?*

The Significance supplemental record includes:

- significance based on the criteria being developed
- year significance was determined
- notes

*3. How are entries ordered in the Significance supplemental record?*

Entries appear on the screen in progressive order (the order in which you enter them).

## B. Adding a Significance Supplemental Record

*1. How do I complete an entry in the data fields on the Significance supplemental record?*

You can add, edit or delete a supplemental record from the Supplemental Information page on the catalog record. You can also use the Mass Supplemental Update function to attach a supplemental to a group of records (see Section I.E above).

Complete entries to the Significance supplemental record as follows:

*Significance (Signif)*

User-built table (F5, Ctrl-F5).

Enter the significance of the object **based on the criteria being developed**.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

*Year of Significance (Year of Signif)*

Straight entry field.

Enter the year in which the significance was determined.

*Notes*

Memo field.

Record additional information about the significance of the object.

2. *What significance information prints on the catalog record?*

The NPS Form 10-254 and the DOI CR/NH Museum Catalog Record contain a one-character Significance field.

| **If there is...** | **Then the system...** |
|---|---|
| information in the Significance supplemental record, | prints a "Y" in the Significance field on the NPS Form 10-254 or the DOI CR/NH Museum Catalog Record. |
| no information in the Significance supplemental record, | prints a "N" in the Significance field on the NPS Form 10-254 or the DOI CR/NH Museum Catalog Record. |

# XXIV. NAGPRA (Old) SUPPLEMENTAL RECORD

***The NAGPRA supplemental was used in the NPS ANCS+ version 2.7 and was replaced by the NAGPRA associated module in version 6.3. The NAGPRA (Old) supplemental remains so the NPS can view legacy data.***

## A. Overview

*1. What information does the NAGPRA supplemental record contain?*

The NAGPRA supplemental record includes:

- Module ID number
- MNI (Minimum Number of Individuals)
- Affiliated Tribes

Note: This supplemental record was available for Cultural Resources (CR) records only.

*2. Can I still use the NAGPRA supplemental to record NAGPRA information?*

No. All NAGPRA information is now entered in the NAGPRA associated module. Refer to Section XIII of Chapter 4 for information on how to use the NAGPRA associated module.

*3. What are the fields in the NAGPRA supplemental record?*

Following is the description of what each field contains in the NAGPRA supplemental.

*Module ID Number*

This is the park acronym and the previously assigned ID # from the park's NAGPRA Module Inventory of Human Remains and Associated Funerary Objects.

Example: BIBE3
GUIS22

*MNI*

For human remains only, this is the minimum number of individuals for that catalog record. This number may or may not be the same as Item Count.

Example: If Item Count=2 human skeletons, then MNI=2.
If Item Count=120 bones from one individual, then MNI=1.

*Affiliated Tribe*

This contains the names of all Indian tribes culturally affiliated with this catalog record. The table provided by the Departmental Consulting Archeologist contained the legal names of all federally-recognized Indian tribes, Hawaiian organizations, and Alaska villages and corporations.

Example: Muscogee (Creek) Nation, Oklahoma
Hui Malama I Na Kupuna O Hawai'i Nei
Igiugig Native Corporation

# XXV. INVENTORY HISTORY SUPPLEMENTAL RECORD

## A. Overview

*1. When do I use the Inventory History supplemental record?*

Use the Inventory History supplemental record to view a history of when a catalog record has been included in a Random Sample or Controlled Property inventory in the Inventory module (AIP).

You can also use it if you do a 100 percent inventory of your collections.

*2. What is the purpose of the Inventory History supplemental record?*

The Inventory History supplemental record saves data from the Inventory module. It can also be updated manually when performing a 100 percent inventory of your collection. It allows you to see when a record has been inventoried. It includes:

- Inventory type (Random Sample or Controlled Property)
- Fiscal year of the inventory
- Date the inventory was generated
- Notes

*3. Must I create an Inventory History supplemental record?*

This depends on the type of inventory you perform.

| **If you…** | **Then…** |
|---|---|
| use the Inventory module | No. The program will create the supplemental record for you when the catalog record is included in an inventory generated from the Inventory module. |
| perform a 100 percent or other type of inventory | Yes. You will have to create the supplemental record manually. |

## B. Adding an Inventory History Supplemental Record

*1. How does the Inventory History supplemental work with the Inventory module?*

The program creates an Inventory History supplemental for a catalog record when the catalog record is included in a Random Sample or Controlled Property inventory generated from the Inventory Control Page of the Inventory module (AIP).

When a user updates Inventory records from the Inventory Random Sample or Inventory Controlled Property screens, the program updates the matching Inventory History supplemental records.

Refer to Appendix I: AIP for information on how to generate the Random Sample and Controlled Property inventories.

*2. What information is transferred from the Inventory module to the supplemental record?*

The supplemental record includes the Inventory Type (Random Sample or Controlled Property), Year, Date, and Notes. The Notes field includes the Yes/No and Remarks/Condition fields from the Inventory record.

*3. Can I go into the supplemental record and add an entry?*

For the inventory history supplementals added by the Inventory module (AIP), it is not recommended that you modify them from the catalog record. Any updates to the inventory information should be made in the Inventory

module. The program will then automatically add/update the supplemental for you.

If you are doing an inventory outside of the Inventory module, you can add or update an inventory history supplemental on individual records or use the Mass Supplemental Update on groups of records. Complete the fields as follows:

*Inventory Type (Inv Type)*

Straight entry field.

Enter the type of inventory: 100 Percent, Random Sample or Controlled Property.

*Year*

Numeric field.

Enter the 4-digit fiscal year when the inventory was conducted.

*Date*

Date field.

Enter the date that the inventory was generated. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

**Note:** To remove a date from the field, press Ctrl-Delete.

*Notes*

Formatted memo field (F12 to expand). The field also will expand as you begin to type or click on the icon. The field will expand into nine subfields that correspond to the Yes/No and Remarks/Condition fields from the Inventory record. Refer to Appendix I: AIP for specific information about completing each of these fields.