

National Catalog Submission Using ICMS

05/15/2015

Once a year, each park submits its data to the National Catalog for review, printing, and inclusion in the service-wide National Catalog database. The data are also used to generate park Collections Management Reports (CMR). You must submit your data even if there was no cataloging activity during the year. Checklist (ACP) records, Cultural Resources (CR) and Natural History (NH) catalog records, and Accession records are required for submission. Including your Archive module data is required. **Be sure to submit your ACP data with your National Catalog Submission.**

*Note: National Catalog Submissions must be complete by **September 15!** The Museum Management Program in WASO will complete your CMR for you. Refer to the "FTP Instructions" for details of how to upload your National Catalog Submission.*

To complete your National Catalog submission, you'll need the following basic skills:

- ICMS navigation. Review *ICMS User Manual*, Chapter 1: System Basics.
- ICMS queries (Advanced Filter, and Tag Sets). Review *ICMS User Manual*, Chapter 7, Finding and Grouping Records.
- Windows Explorer navigation, copy, and paste techniques.
- Knowledge of National Catalog submission procedures. Refer to *ICMS User Manual*, Chapter 9, Section II, E: National Catalog Submission, and to "FTP Instructions."

You'll also need the following tools:

- Internet access, preferably from your ICMS computer.
- OR
- A CD-writer, software, and blank CD.

There are three basic steps to complete the National Catalog submission:

1. Create one tag set of your new and re-cataloged CR catalog records, and one tag set of your new and re-cataloged CR catalog records, for the fiscal year. These tags are used for printing at the National Catalog.
2. Perform the data backup; this requires Administrator (Special Function) security.
3. Submit your backup files by Internet FTP or by regular mail on CD.

Below are complete instructions for each step.

1. Create a tag set of your new and re-cataloged records for the fiscal year.

If during the fiscal year you have added new catalog records to your database, or re-cataloged existing records, then you need to create a tag set of all new and re-cataloged records. *If there are no new or re-cataloged records, skip to step 2 to perform the data backup.*

- a. In ICMS, use the Home Page or Navigator to open the Collections node. Then select a directory, such as "PARK - Cultural Resources" or "PARK – Natural History" (where "park" is your park acronym). Open the Catalog Records module.

- b. Identify your new and/or re-cataloged records for the fiscal year using one of the query tools available, such as Advanced Filter, Quick Filter, or Advanced Search, or Quick Search. You may need to combine the results. Review all the methods below, and use the method(s) that best suit your data.

The simplest method is:

- From the Record menu, choose Advanced Filter. In the Advanced Filter window, select the Field “Change Date”; select the Comparison “Greater Than or Equal”; enter the Value 10/1/2014 (the first day of the current fiscal year). Click the Activate link to activate this filter. The result will be all the catalog records that were added or modified during the past fiscal year.
- From the Record menu, choose Add All Visible to Tag Set. Create a New tag set. Enter a name for the tag set (“PARKCR2015”, for example), and Allow Others to Use the tag set.

Other methods you should use if appropriate to your situation:

- If you have a consecutive range of new catalog numbers, use Advanced Filter to set a range on these numbers. In the Navigator, open the nodes under Catalog Records to see Built in Filters. Click the “Catalog Number Range” filter. Enter the first and last catalog numbers in the range (including park acronym), and click OK. The result will be all the records within that range of catalog numbers. See step c. below for help creating a new tag set, or adding these records to an existing tag set.
- To identify new records added to the system during the fiscal year, you can set a filter on the Log Date. From the Record menu, choose Advanced Filter. In the Advanced Filter window, select the Field “Log Date”; select the Comparison “Greater Than or Equal”; enter the Value 10/1/2014 (the first day of the current fiscal year). Click the Activate link to activate this filter. The result will be all the records that were added during the past fiscal year.
- To identify scattered catalog records or to review and select them individually, you can build the tag set “by hand.” From the Record menu, choose Build a Tag Set. Create a new tag set, or select an existing tag set. Now, select any record you want to add to the tag set (you can even select multiple records in the List Pane using Shift-click or Ctrl-click). From the Record menu, choose Add Selected Item(s) to Tag Set. The selected record(s) will be added to the tag set you specified. When you’ve added all the records you need, from the Record menu, choose Build a Tag Set again to de-activate that feature.
- To find only RECATALOGED records, where significant modifications were made and you consistently used the RECATALOG option in the Catalog Notes supplemental when editing: From the Record menu, choose Advanced Filter. In the Advanced Filter window, select the Field “CATALOG NOTES: LEVEL”; select the Comparison “Starts With”; enter the Value RECATALOG. Click the Add a New Filter Item link. In the new row, select the Field “CATALOG NOTES: DATE”; select the Comparison “Greater Than or Equal”; enter the Value 10/1/2014 (the first day of the current fiscal year). Click the Activate link to

activate this filter. The result will be all the records that were re-cataloged during the past fiscal year.

- c. Create a tag set of your new and/or re-cataloged records. You must have one tag set for all Cultural Resources catalog records, and one tag set for all Natural History catalog records you are submitting as new or re-cataloged. You can create one tag for all such records if they are easily gathered together using any of the examples above. Or you can use a combination of these examples to make sub-groups of records, which you can combine into one final tag set. In all cases, you can use “Add Selected Items...”, “Add All Visible...”, or Tag Set Management (all on the Record menu), to create or combine your tags.

Name the final file PARKCR2015 (where “park” is your park acronym, and “2015” is the fiscal year).

Repeat steps 1a – 1c to create a tag set for your Natural History records. At step 1a, choose “PARK – Natural History” from the Navigator, and open Catalog Records. At step 1c, name the tag set “PARKNH2015” (where “park” is your park acronym, and “2015” is the fiscal year).

2. Perform the data backup (requires Special Function security rights).

Reminder: Include your ACP data and National Catalog Submission in one backup. Making your submission with only one backup file will save time!

Reminder: You are required to include your Archives directory in the backup. You can still make a single backup file.

From the File menu, choose Backup Data. Choose the “National Catalog Submission” option. The “Management Reports” module will automatically be checked. Leave it checked. Also click the checkboxes for your park data directories under Collections and Archives. For example PARK - Cultural Resources, PARK - Natural History, and PARK - Archives (4-level), where “PARK” is your park acronym.

[Note: Do not include non-PARK directories, such as “TEMP” directories or directories loaded from NPS Centers. All your museum records should be included in your CR & NH “PARK” directories, which are the only directories required for National Catalog Submission.]

Make a note of the location where the backup file will be saved. If you want to choose a location to save the file, click the Browse link. We recommend you save the file in your “My Documents” folder, so it will be easy to find.

Make a note of the backup zip file name. Please use the default zip file name, which will be similar to: “ACP-CR_PARK-NH_PARK-AR_PARK-CatalogSubmission-9-1-2015.zip.” You can un-check the box to enter a name of your own choosing. If you choose to do so, we recommend you enter a name that includes your park acronym, such as “PARK-National-Catalog-Submission-9-1-2015.zip”.

Click the Start Backup link to start the backup. The backup will create a zip file, with the name you assigned it, in the folder you indicated. When the backup is complete, you can upload this file to the NPS National Catalog Submission FTP site (see step 3 below).

Note: if you do not have internet access and will be mailing your submission on CD, you will need to copy the backup zip file to CD. The backup process cannot write to a CD automatically. Some computers come with writable CD drives, while others do not. Check with your local IT staff to see if you have the proper hardware and software to write CDs. It is highly recommended that you upload your backup zip file using the FTP site.

3. Submit your backup files by Internet FTP or regular mail.

Follow the instructions in FTP_Instructions8.doc. You will find that document at:

<ftp.rediscover.com/NPSupdates/WhitePapers8>

Or

<http://www.rediscover.com/npssubmissions.aspx>

The FTP_Instructions8.doc explains the steps in detail. If you are familiar with uploading files to an FTP site, the general instructions below may be adequate:

In Windows Explorer, open the folder where your backup file was saved. We recommend you save the file to your "My Documents" folder so it will be easy to find. Find the backup zip file. It will have the name you assigned it, such as "ACP-CR_PARK-NH_PARK-AR_PARK-CatalogSubmissions-9-1-2015." Select the file. Copy it, by pressing Ctrl-C on the keyboard or by choosing Edit, then Copy, on the menu bar.

In the "Address" line in Windows Explorer (or in My Computer or Internet Explorer), type this address: <ftp://67.221.117.85/catalogsubmissions/>. Note: If you are using Microsoft Internet Explorer 11, you may see the site as a list of file names. From the "View" menu, choose "Open FTP site in Windows Explorer". Then you will be prompted to enter the user name and password. The user name for the site is "NCSNPS", and the password is "ICMSnCS!1". Paste your file by pressing Ctrl-V on the keyboard, or by choosing Edit, the Paste, on the menu bar. Your file will copy to the FTP site. It may take several minutes.

Note: if you have difficulty copying your file to the FTP site, you may receive a message such as "access denied" and "check permissions." Ask your network administrator or IT staff to try to upload the file. Some offices place limits on which users are allowed to upload files, or have limits on the size of files that may be uploaded. Someone with administrative rights on your network should be able to upload the file for you.

When the file has finished copying to the FTP site, send one e-mail to the e-mail group "WASO CMR-NC Submission" or to the address CMR_Submission@nps.gov

Stating the following:

For the CMR:

- a. park name and acronym
- b. total number of research requests from within the park during the fiscal year

- c. total number of research requests from outside the park during the fiscal year
- d. any noteworthy accession, deaccession or other noteworthy information during the fiscal year
- e. any adjustment needed to your catalog backlog numbers, with justification.

For Catalog Submissions:

- f. name of tag set(s) for new and re-cataloged records in CR and NH catalog
- g. the low and high catalog numbers in the tag, and total number of records in the tag
- h. optional request to have blue paper catalog records printed
- i. any additional printing requests
- j. contact name, shipping address, and phone number

When you have uploaded your backup and sent the e-mail, your submission is complete.