



# User Manual

## RIA applications

### zetcom

Framework version: 2.6.0

Dated: January 2019

Language: English



## User Manual RIA applications zetcom

Framework-Version: 2.6.0

Officially Supported Browsers:

- Mozilla Firefox (latest version)
- Mozilla Firefox ESR (latest version)
- Safari (latest version)
- Google Chrome (latest version)
- Microsoft Edge (latest version)

Dated: January, 2019

Language: English

**This user manual is produced by:**

zetcom Group  
Sandrainstr. 3  
3007 Bern  
Switzerland

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# 1 About this manual

**Usage and functionality** The manual provides an overview for usage and functionality of the software. The manual discusses the basic workflow for daily use and enables efficient navigation and usage.

Please consider that the software has a broader range of functions than described in this manual.

Please consider using the Google Chrome Browser for it is the most stable browser for the zetcom RIAs.

## 1.1 Usage

**Individual configuration** Since the field labels and software modules are adapted to the specific needs of each client, your configuration may have a different layout or design. More details about this are in *Chapter 1.3 Functions in RIA applications, p. 2*.

**User manual** In this manual, you will find information about the software based on the generic modules which are part of any RIA application.

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**Note** The information about the different modules and functions is located in the Administration Manual or in the Report Manual.

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**Different look – same functionalities** The functions described in this manual are available in the software, even if your configuration looks different.

**Ongoing improvements** The RIA framework is constantly being developed and optimized. Functions are extended, content is improved and adapted. New versions and releases/patches (improvements) are provided free of charge if not mentioned otherwise. Therefore, it is possible that future versions of the product will differ from those described in this manual.

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**Note** For a quick summary, we recommend proceeding to *Chapter 2, Getting started, p. 3*, where you will find a quick overview of the basic functionalities.

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## 1.2 Format conventions

In this manual, various paragraph and character formats are used for specific situations:

**Marginal notes** Marginal notes are single words, or phrases on the left side of the text. These offer a second reading level and let you gather important information at a glance.

**Notes** Notes and important information are labeled “Note” in the marginal column on the left side. The descriptive text for this is smaller than the body text and framed:

**Note** For a quick summary, we recommend proceeding to *Chapter 2, Getting started, p. 3.* where you will find a quick overview of the basic functionalities.

Figure 1: Example note

**Controls / labels** Controls and labels of RIA applications are marked in bold, e.g. field label **Last name**.

**References** References and active links to other sections within this manual are in italics, e.g. see *Chapter 2, Getting started, p.3.*

**Data entries in the program** If a data field is filled with content (data is added in the program), this character sequence is marked in typescript as follows in the manual:

Field **Address:** 01234 Bloomingburg

## 1.3 Functions in RIA applications

**RIA framework** The foundation for the RIA software applications developed by zetcom Group is the Rich Internet Application (RIA) framework.

**Customizing** The framework can be configured and optimized individually. Therefore, the layout or designations in this manual may differ from your application.

**Database architecture** All RIA applications are based on a relational database architecture.

**SaaS** You can choose between the options SaaS (Software as a Service) or a local installation dependent on your infrastructure. If you select SaaS, zetcom Group provides the hosting (including online storage), maintenance and system updates, daily backups and user support.

## 2 Getting started

To start the program, you need an HTML5-enabled browser. Please enter the link you received from zetcom into the address bar of your web browser. This link triggers the launch of RIA.

After logging in with username and password, the program starts and then runs within the web browser.

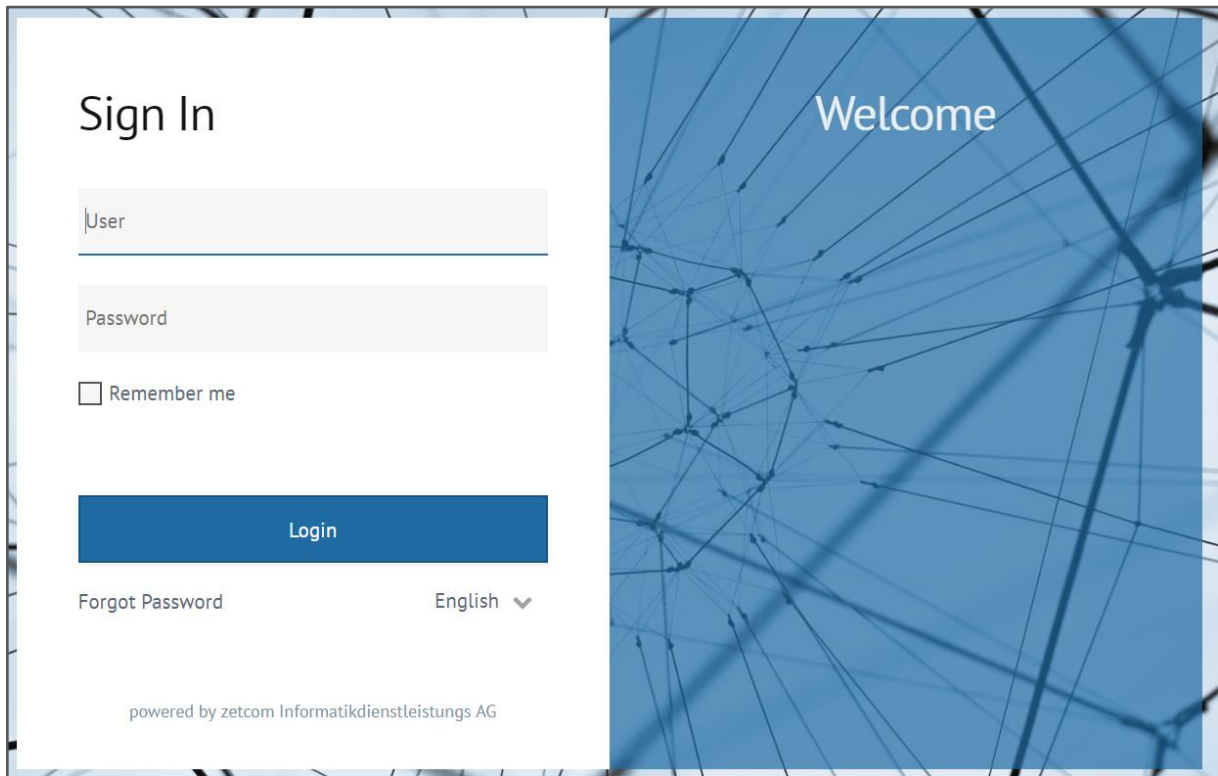


Figure 2: Example login screen

**Select language** You may need to change the language settings in the language selection box.

**Remember me** Activate the option **Remember me**. This feature will keep you logged in upon return until you explicitly use the logout button.



In order to stay logged in permanently, go to your **User Settings** module in the **User** area and activate the **Remember me / Auto login** check box.

**Add link to browser favorites** For future use of the RIA, it is recommended that you add this link to your favorites. Regardless of which browser you use, the **Add to Favorites** button is a star or a symbol, next to your URL.

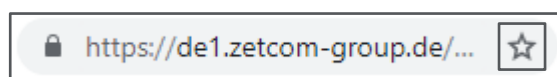


Figure 3: Google Chrome, Add to Favorites button

## 2.1 Screen layout

**Layout** The screen layout (interface) allows you to use various functions and provides clear navigation, divided into different sections.

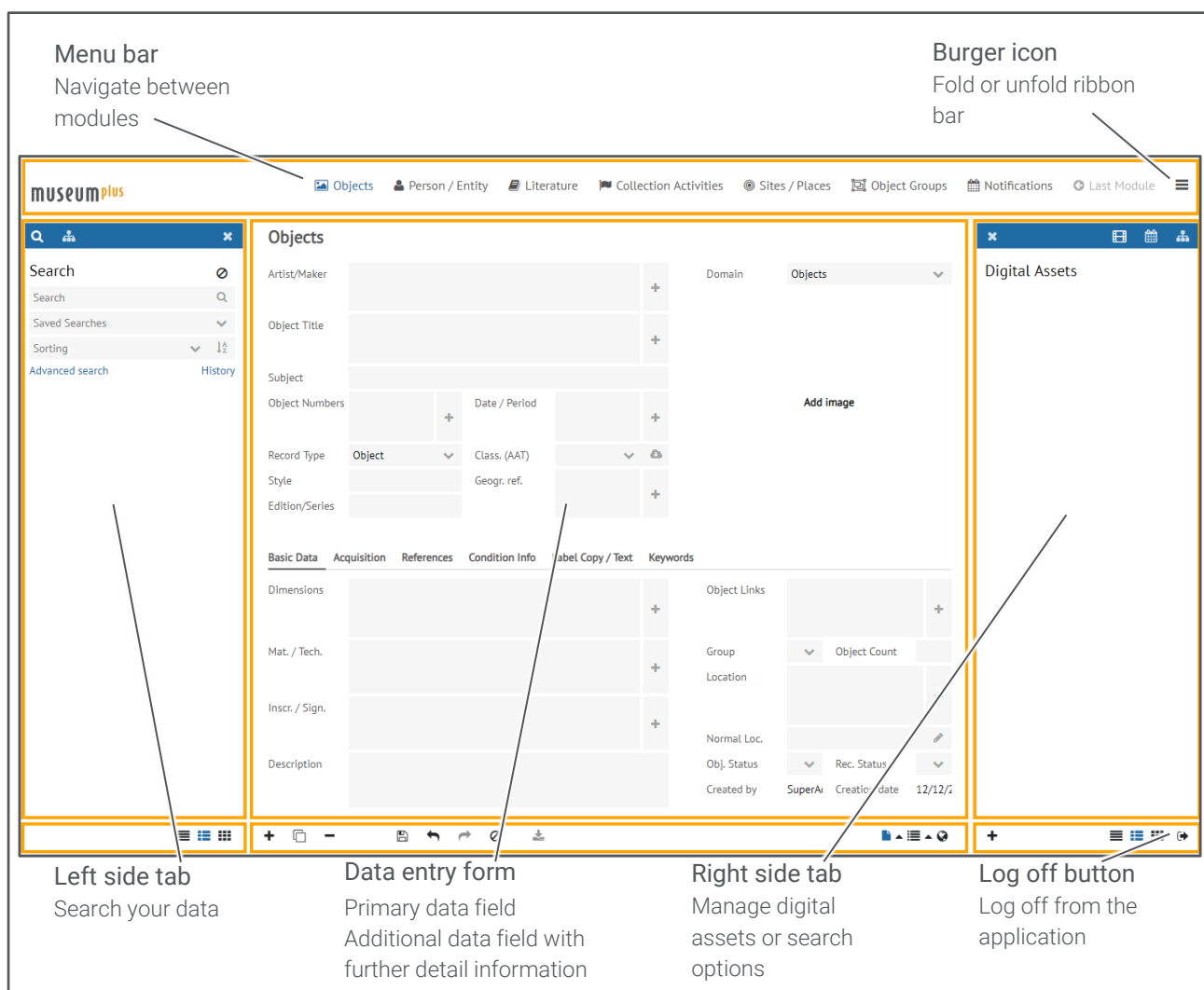


Figure 4: User interface, functional areas

The user interface of RIA applications is designed so that you can work intuitively in the program. Interface layout and functions are explained to help you navigate and manage your records.

**Module condition** If you have never worked within a module, the start screen will open with an empty data mask and the unfolded left side tab for the search.

If you have already worked with the application, the screen opens with the last edited data record.

**Active / Inactive buttons** Black icons or buttons in a black font are selectable. Light gray icons and buttons cannot be selected. These are inactive.

**Focus** Selected modules and fields are displayed in blue or with a blue underline, as they are active. The module in which you are located, is, for example, always represented with a blue icon and font in the menu bar.

This function is called Focus. It helps you stay oriented in RIA applications. In *Figure 5: Example focus feature*, you will be able to locate yourself in the module **Address** because of the blue font:

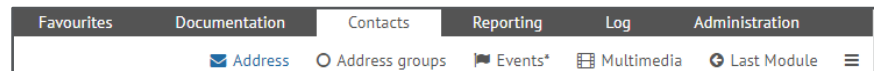


Figure 5: Example focus feature

**Note** The color of the Focus function may differ depending on the RIA you are using.

**Dialog box** RIA applications use dialog boxes to display additional content. The following example dialog box in *Figure 6: Example dialog box in empty data entry screen form* allows to add, edit or remove numbers and information in the **Address** module.

The data entry area behind the dialog box is inactive as long as the dialog box is active. You can click **Cancel/X** or **OK** to deactivate the dialog box and return to the data entry form. For more information about dialog boxes go to *Chapter 4.1 Field types, p 18*.

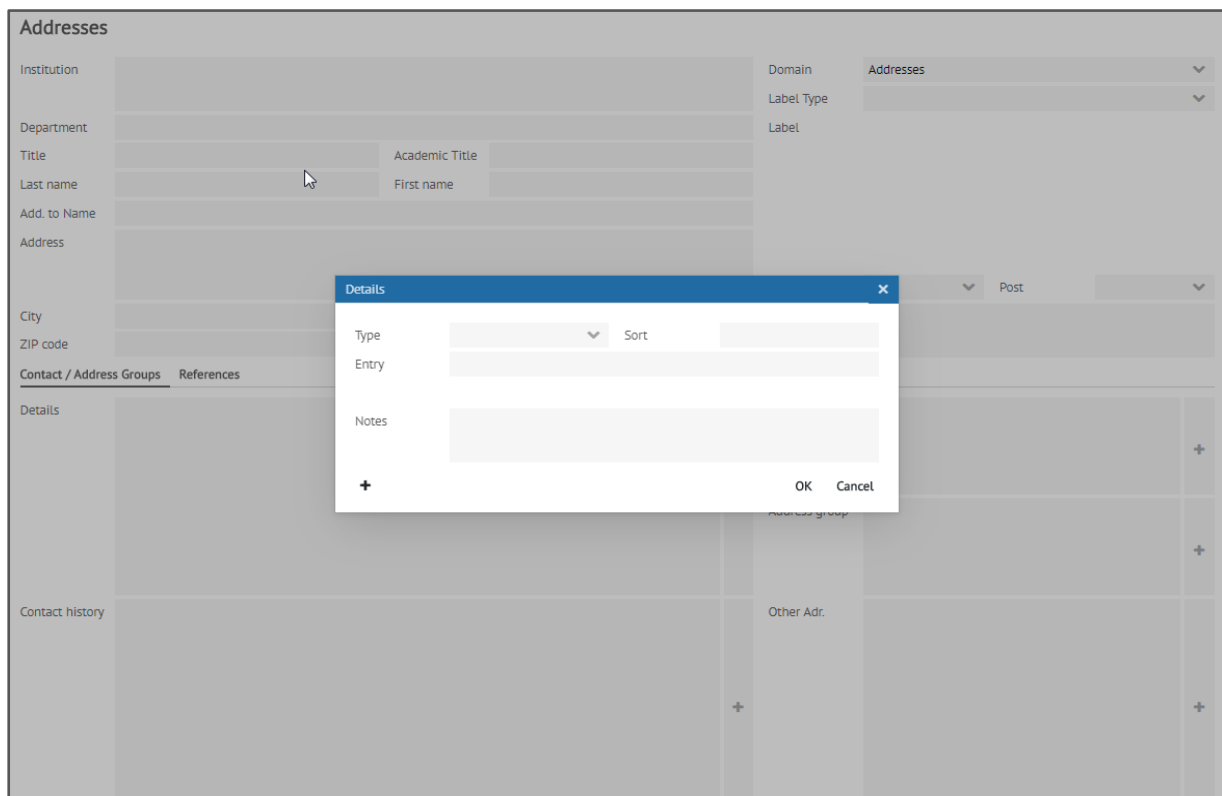


Figure 6: Example dialog box in empty data entry screen form



**Save all changes** In general, you always have to save your changes to a record. Before you move to another record, you will be asked by the application to confirm changes (**Save**) or dismiss changes (**Dismiss**):

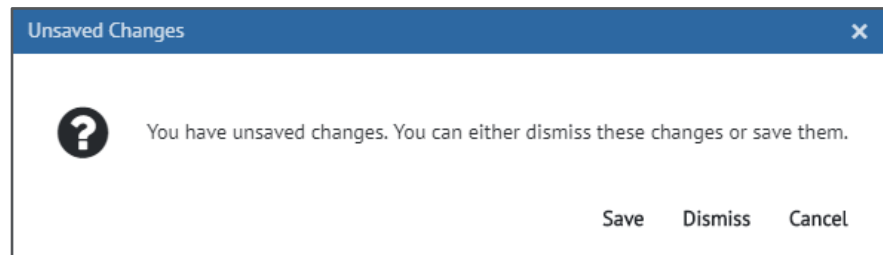


Figure 7: Query for unsaved changes

## 2.2 Menu bar

The menu bar forms the upper portion of the user interface. Via this control, you can navigate between modules or thematic areas.

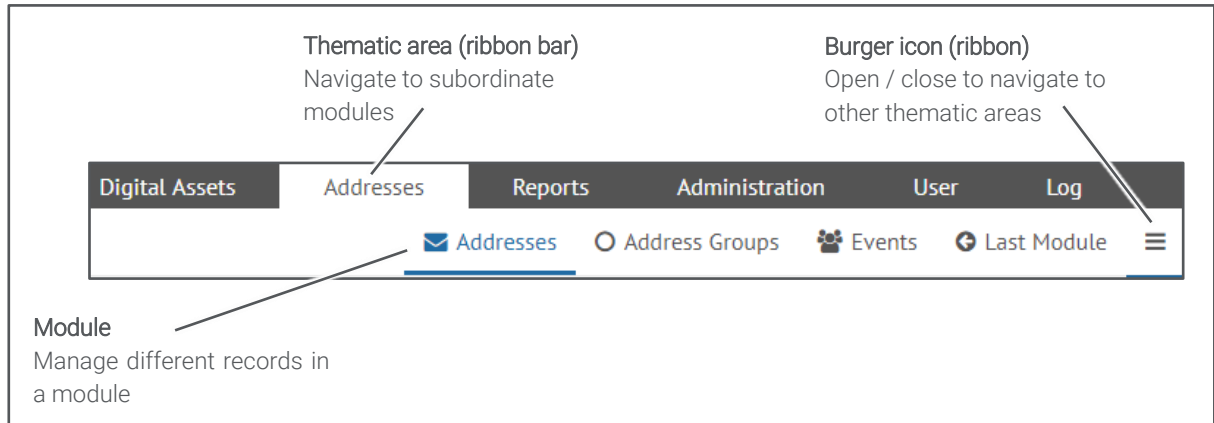




Figure 8: Menu bar and ribbon bar

**Burger icon** By choosing the burger icon on the right side, the ribbon bar will be folded in or out. 

**Last module** The Last Module command, placed in all menus on the far right, allows you to move back to your recently accessed modules. 

**Note** When changing from one module to another, the modules will remain on the same page upon returning.

e.g. If you are in the Address module then switch into the Multimedia module and then switch back into the Address module, you will find yourself on the same page with the same data before the switch.

**Note** Please note that the number of modules that can be seen in the ribbon bar depends on the access rights the logged in user has. If a user does not have the right to work with a specific module, the module will not be displayed in the ribbon bar.

## 2.3 Data entry form

**Basic information** The data entry form is the area to enter and manage basic information for any record. The changes in the data entry form apply for the currently opened record.

The screenshot shows the 'Addresses' data entry form in the MuseumPlus application. The top navigation bar includes 'Collections', 'Loans / Exhibitions', 'Digital Assets', 'Addresses', 'Reports', 'Administration', 'User', and 'Log'. The 'Addresses' tab is active, showing a search bar and a list of 'Addresses (20 found)'. The main form area is divided into two sections. The top section contains fields for 'Institution' (Art Institute), 'Department', 'Title', 'First name', 'Last name', 'Add. to Name', 'Address', 'Postbox', 'State' (IL), 'ZIP code', 'City' (Chicago), 'Country', 'Domain' (Addresses), 'Label Type' (Standard), 'Label' (Art Institute), 'Email', 'Post', 'Language', 'Acronym', and 'Notes'. The bottom section has tabs for 'Contact / Address Groups', 'References', and 'Privacy'. The 'Contact / Address Groups' tab is active, showing a 'Details' section with a large text area and a 'Contact history' section with a table. The 'Details' section also includes 'Salutations', 'Function', 'Address group', and 'Address Links'.

Figure 9: Data entry form. e.g. MuseumPlus

**Main data entry form** The data entry form is divided into two areas. The upper half of the screen is designed for the 'primary' data, while the bottom half offers a more detailed area to add additional information in the appropriate tabs.

The views and tabs may vary depending on your RIA.

### 2.3.1 Header

**Header** The header in the right upper corner, the status information of the currently selected record is displayed in blue font.

**ID: 223839 | SuperAdmin 04.04.2018**

Figure 10: Status information record

It contains:

- Unique ID number of the record which is automatically generated by zetcom
- The name ID of the user who last altered the record
- The date on which the record last was worked on

**Change History** Clicking on the status information opens a dialog box displaying all changes made to the record. The fields displayed in chronological order include the data and time stamp, User ID, modified field name, original field value and the new field value:

ID: 38011   SuperAdmin 08/01/2019 07:43				
Time	User	Field	Old Value	New Value
08/01/2019 09:43	SuperAdmin	Address	Sandrainstrasse 3	Sandrainstreet 3
08/01/2019 09:43	SuperAdmin	Language		en
08/01/2019 09:43	SuperAdmin	Department		Sales
08/01/2019 09:42	SuperAdmin	Academic Title	Dr.	Prof.
08/01/2019 09:42	SuperAdmin	First name	John	Jane

Figure 11: Dialog box change history

## 2.3.2 Footer

**Footer** The footer at the bottom of the data entry form contains additional icons for entering, editing and selecting a data entry view for a record. There you will find icons for the navigation among the records as well.



Figure 12: Footer

**Create, duplicate or delete records** The icons on the left side of the footer allow you to create, duplicate or delete records. More information about this feature can be found in *Chapter 4.3 Creating records, p. 27*



**Note** If you hover over an icon with your cursor, a brief description is displayed.

**Save record** To save any changes you made you need to click on the Disc icon.



**Undo Redo** With the Undo/Redo icons you may undo changes in single fields.



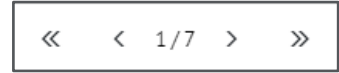
**Discard all changes** If you want to discard all changes since the last time you saved them, please click on the no-show button in the toolbar.



**Export** Via the icon **export**, you can export the data of the selected record in different data formats from the search list. Target formats are image files, XML files, CSV files, Json files, Microsoft Word and Excel. Different formats may be included depending on your configuration. To export data in these formats, there have to be corresponding templates created in advance and deposited in the templates module.



**Navigation between records** With the navigation icon, you can browse through the current selection or jump to the start/end of the list in the left search result list.



**View selector** The Table and Grid icons in the footer on the right side tab allow you to set the display of linked documents in list, table or grid views with thumbnails.



**Note** Please note that a user can only perform actions for creating, changing and deleting records within a module if he has the necessary rights.

If a user has read-only access to a module's data records, the functions for editing data in that module are disabled.

## 2.4 Left side tab

The left side tab is located below the menu bar, to the left of the data entry form. The main function of the left side tab is defining search criteria.



**Folding/Unfolding left side tab** Click on the magnifying glass to fold/unfold the left side tab.

**Module dependent** The options of the tab are dependent on the selected module. In all modules, you will find a search tab, as shown in *Figure 13: Left side tab*. In this side tab, you can search within the dataset of the selected module, e.g. in the module **Address**.

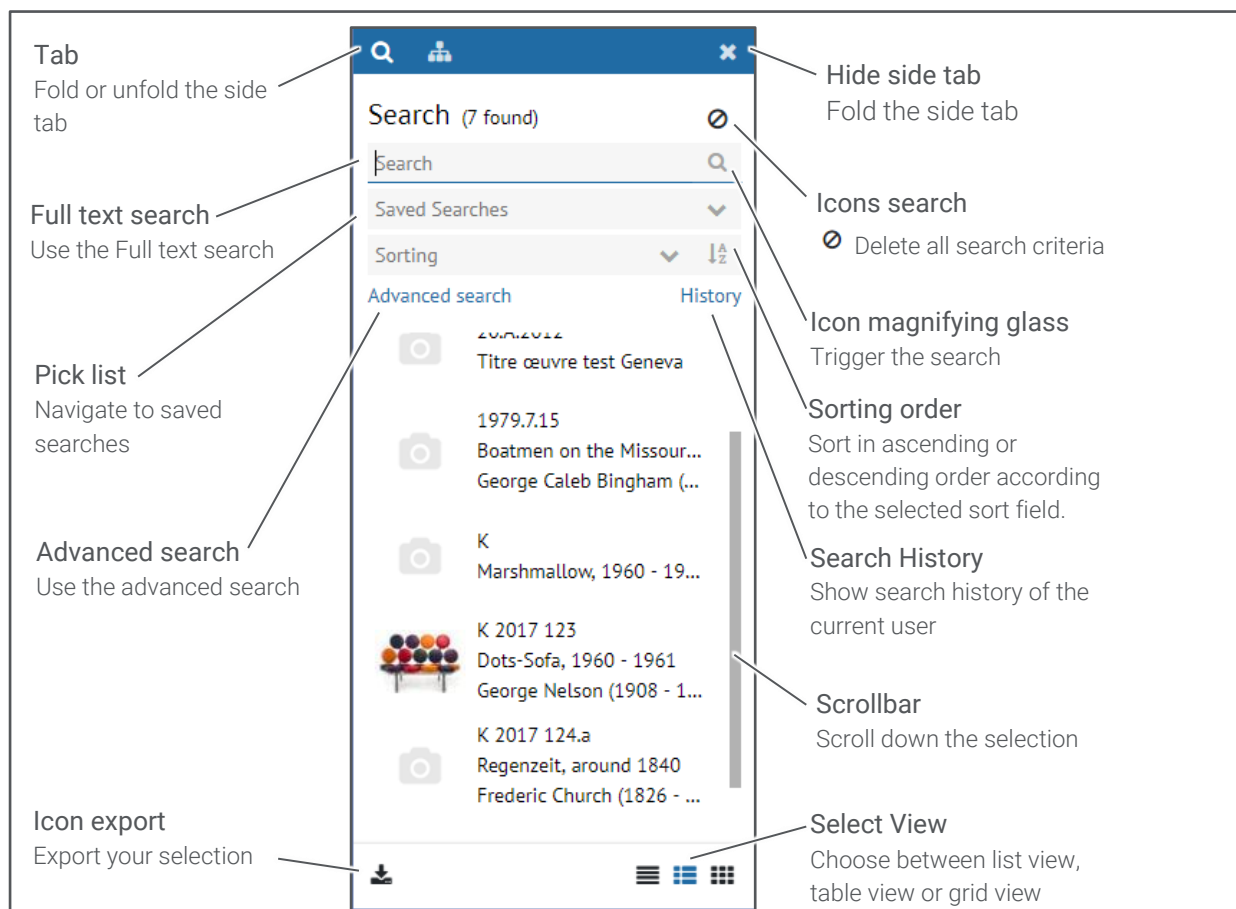


Figure 13: Left side tab

**Search** In the input field, you can enter a search term for full-text search. Via **Advanced search**, you open a dialog box, which offers you options for a more specific search. More information about the search-functionality you find in *Chapter 4.2, Search function, p. 22*.

**Thesaurus** Depending on the module, the left side tab will offer a thesaurus search below the search tab. The Thesaurus offers an overview in form of a wordlist. In the thesaurus-tab, you can carry out a term search for a designated thesaurus field. This function is not available for all zetcom products.



**Export** Via the icon **export**, you can export data of all or of selected records in different data formats from the search list. Target formats are image files, XML files, CSV files, Json files, Microsoft Word and Excel. Different formats may be included depending on your configuration. To export data in these formats, there have to be corresponding templates created in advance and deposited in the templates module.



**Note** Remember to select **all** for a list with multiple objects.

☒ **all**
☐ **selected**

Export

Cancel

## 2.5 Right side tab

The right side tab is located below the menu bar, next to the data entry form.

### Functionalities of the right side tab

This side tab is primarily used to link the selected record in the data entry form with documents and images. This applies to digital documents, images or videos in all file formats. Some zetcom products also include a search function to other modules.

### Folding/Unfolding right side tab

Click on one of the icons (e.g. filmstrip, magnifying glass) to fold/unfold the right side tab.

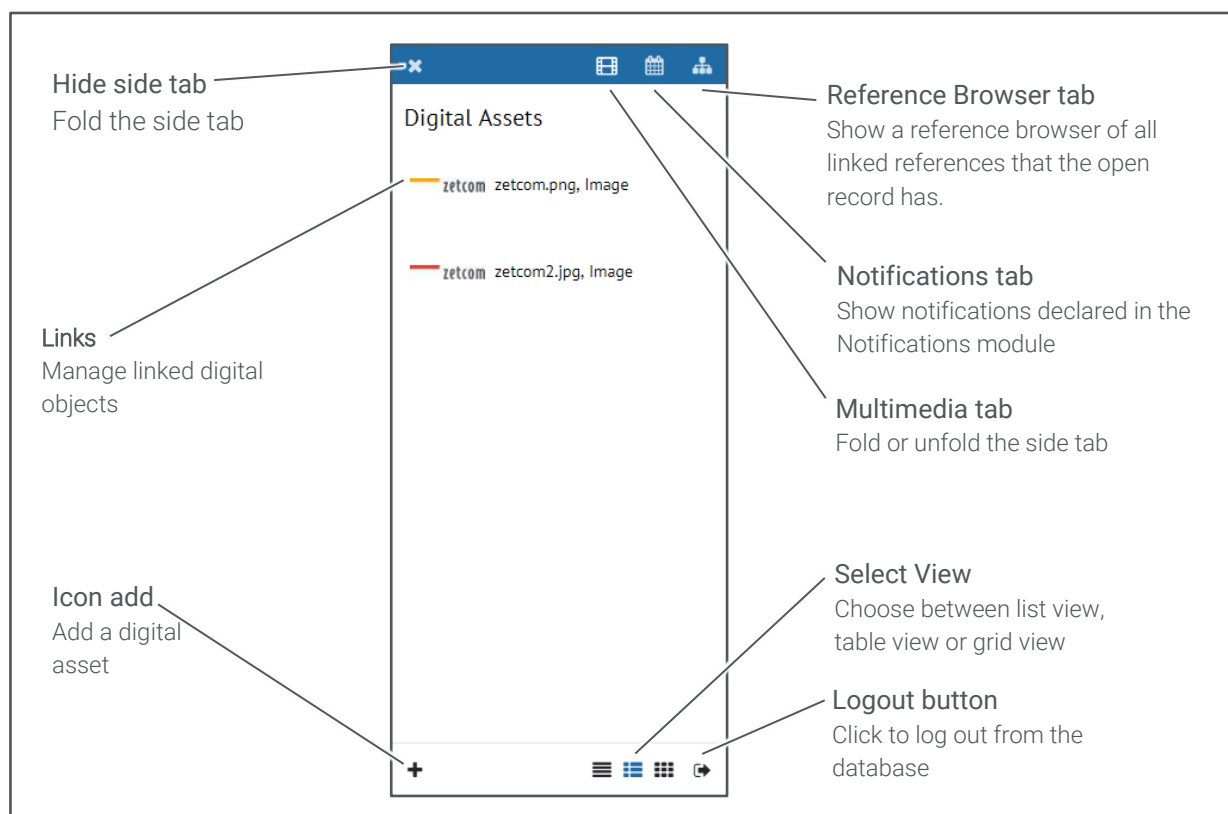

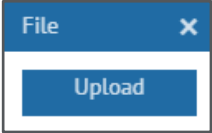




Figure 14: Right side tab

Module dependent	The options available for the right side tab are module-dependent. In almost all modules the right side tab is provided.	
Add new media files	<p>Use the <b>adding-icon</b> to link new digital assets with the current record in the data entry form.</p> <p>Upon clicking on the adding icon, a <b>dialog box</b> should open upon which you may choose the file you wish to upload.</p>	 
Add image to record	<p>If you want to insert an uploaded image into the record you must right click on the image in the right side tab, choose <b>Send to Attachment</b> and confirm with the <b>Save Icon</b>.</p> <p>More information about this functionality you'll find in <i>Chapter 4.6.2 Linking records using the right side tab, p. 29</i>.</p>	 



## 3 Views

In RIA applications, there are different ways to display the data. Different view options are either available by selecting among different views in the side tabs, or on the lower right of the data entry form:

### 3.1 Views in the Data Entry Form

Depending on the module, different view options are provided. The views in the data entry form may vary depending on your RIA configuration.



#### 3.1.1 Form

The form view displays your records represented as a form, labeled fields that are filled with data.



##### Different form views

It is possible to define different form views for different user groups or user tasks. For example, there may be a standard view for internal users and another view for external use, where sensitive fields are not displayed. There may also be views to support various work processes such as those specific to archives or donations. The data remains the same, but the presentation of data may be user and/or function specific. These different views are accessed via the up arrow next to the form icon.

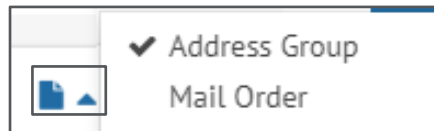


Figure 15: Example views

#### 3.1.2 Table

The table view offers a clear list of the searched records from the left side tab search. The selection is given in tabular form.



##### Different table views

It is possible to define different table views for different user groups or user tasks. The data remains the same, but the presentation of data may be user and/or function specific. These different views are accessed via the up arrow next to the table icon.

Image	Domain	Artist	Title	Dating	Record Type	Class. (AAT)
	Archive	Schultz Folding Box Co. St. Lc	Carrier	1951 - 1954	Object	Carrier
	Archive	Unknown	Photograph 2004.460	ca. 1967 - 1972	Object	Photograph
	Archive	Shoulberg, Phil	Photograph	2001	Object	Photograph
	Objects		Bottle	ca. 1971 - 1972	Object	Bottle
	Archive		Descriptive: 12/31/78 - Memo to Division M		Archive	
	Archive		Organization Chart 10/28/80		Archive	
	Archive		Toddle House, SW 27 Avenue, Miami, FL (int		Archive	

Figure 16: Example form view

- Show/Hide fields

By clicking on the list icon on the right side of the table header, fields in the table header (and therefore table columns) can be shown or hidden, as seen in Figure 17: Selection of the table fields to be displayed
- Export tables

By selecting Excel Export, the existing table and its currently displayed columns, can be exported directly into an Excel sheet.

- ☒ Institution
- ☒ Department
- ☒ Title
- ☒ Academic Title
- ☒ First name
- ☒ Last name
- ☐ Add. to Name
- ☒ Address
- ☒ Postbox
- ☐ State
- ☒ ZIP code
- ☒ City
- ☐ Country
- ☐ Label Type
- ☐ Email

Figure 17: Selection of the table fields to be displayed

### 3.1.3 Grid

The grid view offers a clear list of the searched records from the left side tab search.



The arrow offers the grid view in different sizes.

**Note** This view is not available for some zetcom applications.

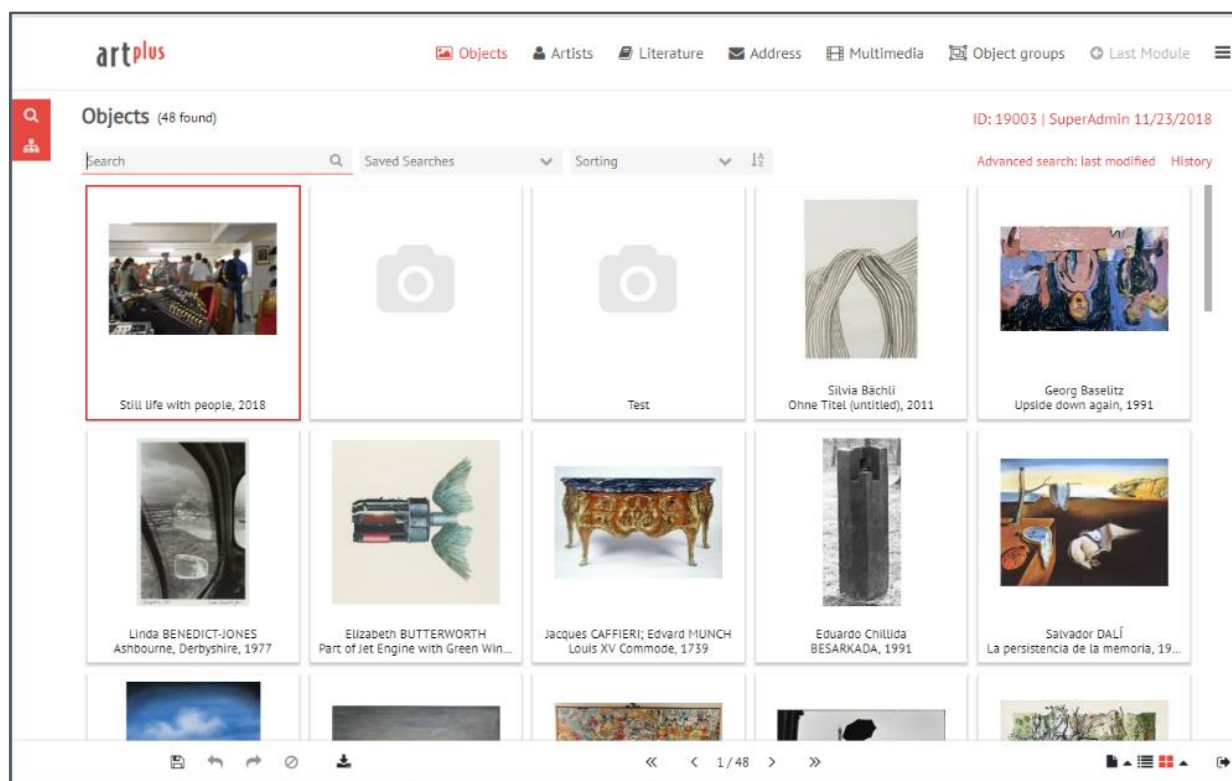


Figure 18: Grid view shown on the ArtPlus<sup>RIA</sup>

## 3.2 View Selection in side tabs

Depending on the configuration, there are three icons to select the view of records in the side tabs;

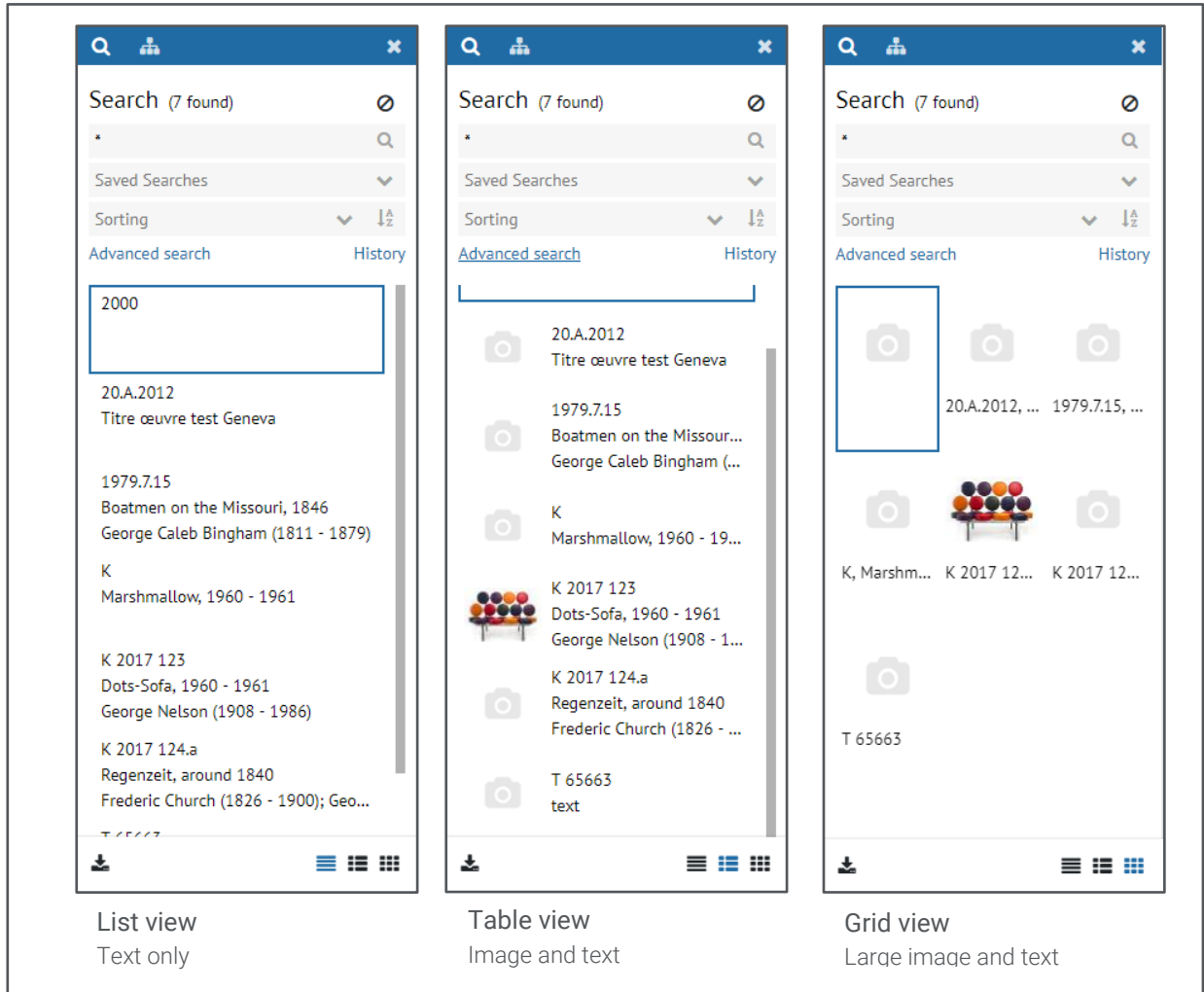


Figure 19: Example view selector in left side tab

**Note** View options may be configured to show specific text fields or to appear in specific modules.

## 4 Functions

RIA applications have many functions. In the following sections, these functions are described in more detail including field types and search options.

### 4.1 Field types

Each data field in zetcom RIA applications can be assigned to a specific field type, regardless of its thematic focus. A field type has the same technical features in terms of its handling in all modules. Below, you will find the different field types listed and explained:

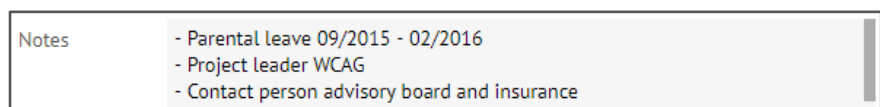
**Text field** Text fields allow the entry of free text. Free text includes uppercase and lowercase letters, numbers and special characters (up to 4000 characters).



A screenshot of a text field with the label 'Last name' and the value 'Alexander'.

Figure 20: Text field


**Expandable text field** As text fields, expandable text fields allow you to enter free text. This type is best suited for entering large amounts of text because the display-area of expandable text fields is extensible. When the text exceeds the field display, a dark gray line appears in the right border. Via this line, you can scroll up and down the text field.



A screenshot of an expandable text field with the label 'Notes' and the value '- Parental leave 09/2015 - 02/2016', '- Project leader WCAG', and '- Contact person advisory board and insurance'. A vertical scrollbar is visible on the right side.

Figure 21: Expandable text field

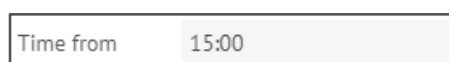
**Number field** Number fields allow the free entry of numbers. In the standard configuration, numbers are automatically provided with a thousands separator.



A screenshot of a number field with the label 'Sort' and the value '1,234'.

Figure 22: Number field

**Time field** Time fields are special number fields, which solely allow the input of numbers in time format. They are characterized by the time schedule hh:mm.



A screenshot of a time field with the label 'Time from' and the value '15:00'.

Figure 23: Time field

**Currency field** Currency fields are special number fields. They allow the entry of numbers in a specific currency format. Currency fields are characterized by a thousands separator and two decimal places after a decimal point.



A screenshot of a currency field. It consists of a rectangular box with a light gray background. On the left side, the word "Value" is written in a small, dark font. To the right of "Value", the number "4,500.00" is displayed in a larger, dark font. The number uses a comma as a thousands separator and two decimal places.

Figure 24: Currency field

**Date field** Date fields allow the entry of numbers in date format. They are identified by the date format, **mm/dd/yyyy** as well as by the **calendar** icon on the right of the field.



A screenshot of a date field. It consists of a rectangular box with a light gray background. On the left side, the word "Date" is written in a small, dark font. To the right of "Date", the date "01/06/2017" is displayed in a larger, dark font. On the far right side of the box, there is a small, dark icon of a calendar.

Figure 25: Date field

**Word list field** Fields with word lists allow the assignment of content from a specific vocabulary list. The **arrow-down** icon on the right of the field characterizes them.



A screenshot of a word list field. It consists of a rectangular box with a light gray background. On the left side, the word "Use" is written in a small, dark font. To the right of "Use", the text "Free for publishing" is displayed in a larger, dark font. On the far right side of the box, there is a small, dark icon of a downward-pointing arrow.

Figure 26: Word list field

**Thesaurus field** Thesaurus fields are special word list fields. They allow the assignment of terms from thesaurus-controlled vocabulary. They are recognizable by the **arrow-down** icon in combination with the **thesaurus** icon.



A screenshot of a thesaurus field. It consists of a rectangular box with a light gray background. On the left side, the word "Location" is written in a small, dark font. To the right of "Location", the text "New York" is displayed in a larger, dark font. On the far right side of the box, there are two small, dark icons: a downward-pointing arrow and a thesaurus icon (a small icon of a book or document).

Figure 27: Thesaurus field

**Reference field** Reference fields allow the entry of links to other records in your database. They are recognizable by the **magnifying glass** icon.



A screenshot of a reference field without an entry. It consists of a rectangular box with a light gray background. On the left side, the word "User" is written in a small, dark font. To the right of "User", there is a small, dark icon of a magnifying glass.

Figure 28: Reference field without entry

If you have defined a reference, the **edit** icon allows you to change the reference, if needed. The **delete** icon removes the linked entry.



A screenshot of a reference field with an entry. It consists of a rectangular box with a light gray background. On the left side, the text "zetcom AG, John Smith, Bern" is displayed in a larger, dark font. To the right of the text, there are two small, dark icons: a delete icon (a small 'x' in a circle) and an edit icon (a small pencil).

Figure 29: Reference field with entry

**Group field** Group fields are fields supporting the merging of different data entries from one module. They are characterized by the icon **edit**. If you select it, a dialog box opens by default in which various information can be collected (only

from the selected module). Upon confirmation (OK), the different data are aggregated in one field.



Figure 30: Group field

### Repeatable group field

Repeatable group fields allow the entry and modification of independent entries in one field. The plus icon at the right of the field characterizes them. If you click on the **plus** icon, a dialog box opens where you can enter the information.

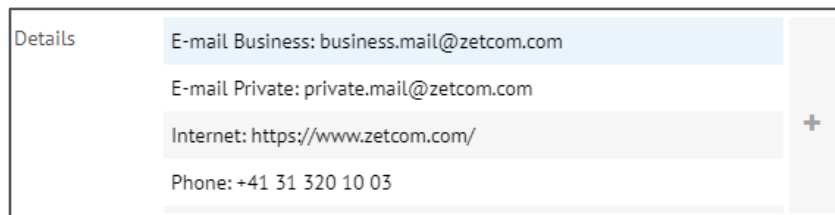


Figure 31: Repeatable group field with entries

If you only want to edit the entry, click on the shaded entry and a dialog box opens where you can change the data of the entry.



Figure 32: Repeatable group field, edit entry

### Add an entry in a group field

To add an entry to a repeatable group field, click on the shaded entry you wish to add an entry to. The dialog box will then open. By clicking on the **plus** icon, a new empty dialog box will open.




Figure 33 Add new entry to group field

**Delete an entry in a group field** To delete an entry from a repeatable group field, click on the shaded entry you wish to delete. The dialog box will then open. By clicking on the bin icon, you delete the entry.

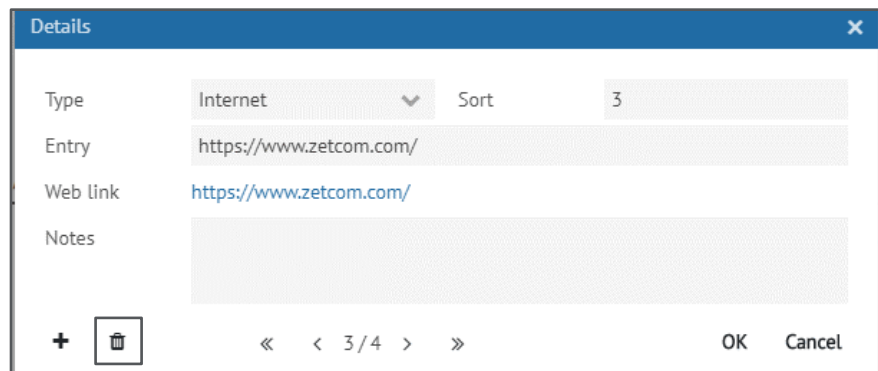


Figure 34 Repeatable group field, delete entry

**Checkbox field** Checkbox fields allow you to select an option. With checkbox fields, yes/no options are organized.



Figure 35: Checkbox field

**Upload field** Depending on the module, you may upload files of any file format in RIA applications. Choose **Add Image**. From there you can navigate to a file and upload it to your RIA application:

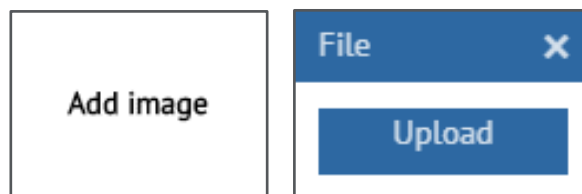


Figure 36: Upload fields

**Note** Depending on your RIA version, a **File** dialog box may appear.

If you enter an image file, a thumbnail is generated by default. If you enter another file format, an appropriate graphic is automatically displayed.

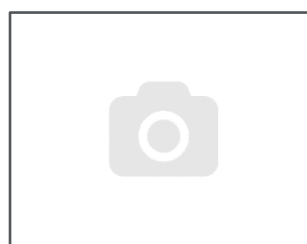


Figure 37: Upload field with thumbnail of image file



## 4.2 Search function

The search function in RIA applications is designed so that you can search for records by various criteria as efficient and flexible as possible.

**Left side tab** The search is located on the left side tab. Please note that you are only searching in the data pool of the module in which you currently are.

In zetcom RIA applications the search function is designed consistently throughout all modules, so you can transfer search mechanisms and operators across all modules.

**Not case-sensitive** The search function is generally not distinguished between uppercase and lowercase letters; it is not case-sensitive. Accents and umlauts are evaluated depending on the general database language settings.

When doing a search, you have three options:

1. Full-text search across all indexed fields.
2. Field-specific sorting with a specific criterion
3. Advanced search

### 4.2.1 Full-text search

Take advantage of the full-text search when looking for certain words or phrases in indexed fields. For the full-text search, the following search operators are available to control your query specifically:

Operator	Description
*	Placeholder (wildcard) for any string. If you enter this operator in the search field, all records of the current module can be found. The placeholder can be set at the beginning, in the middle and at the end of a search term (truncation). <b>M*er finds Miller, Mahler, Moserer.</b>
?	Placeholder for a single character. Within a query can be used one or more of these placeholders. <b>M??er finds Meier, Meyer, Moser.</b>
" "	Use quotation marks to find all records where you want to search exactly for a specific term or a specific sequence of terms. If you combine several terms, they have to be in exactly this order in a specific field – then the record matches the search criteria. <b>"Oil" finds Oil, Oil on Paper, does not find Oilstick.</b>
OR	Use OR, featuring terms as an alternative, but not exclusionary criteria. <b>Miller OR Meier finds Meier, Miller</b>
NOT	Use NOT to exclude terms in your search. <b>New York NOT Albany will find New York Brooklyn, New York Queens, does not find New York Albany.</b>

Operator	Description
>space<	<p>When you enter terms separated by spaces, they are connected with an implicit <b>and</b> in the search execution. This means all terms have to be contained in a record to appear as a search result.</p> <p>Oil paper will find Oil on Rives paper but does not find Oil on wood or Crayon on paper.</p>

#### 4.2.2 Field-specific sorting with a specific criterion

The full-text search always searches all indexed fields. On the other hand, if you want to control the sort order of the search results, you can limit the search to specific fields of the current module with the **sorting** field.

e.g. A search for the expression "Bern" in the field Location of the address module will list the persons and institutions whose residence or business location is Bern, higher.

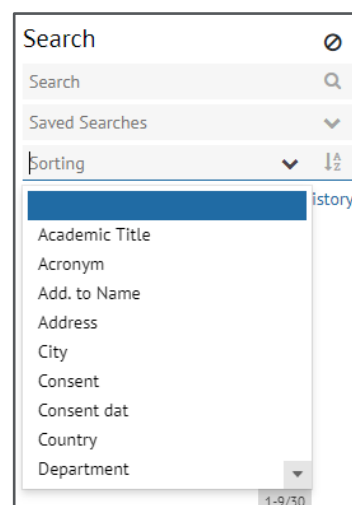
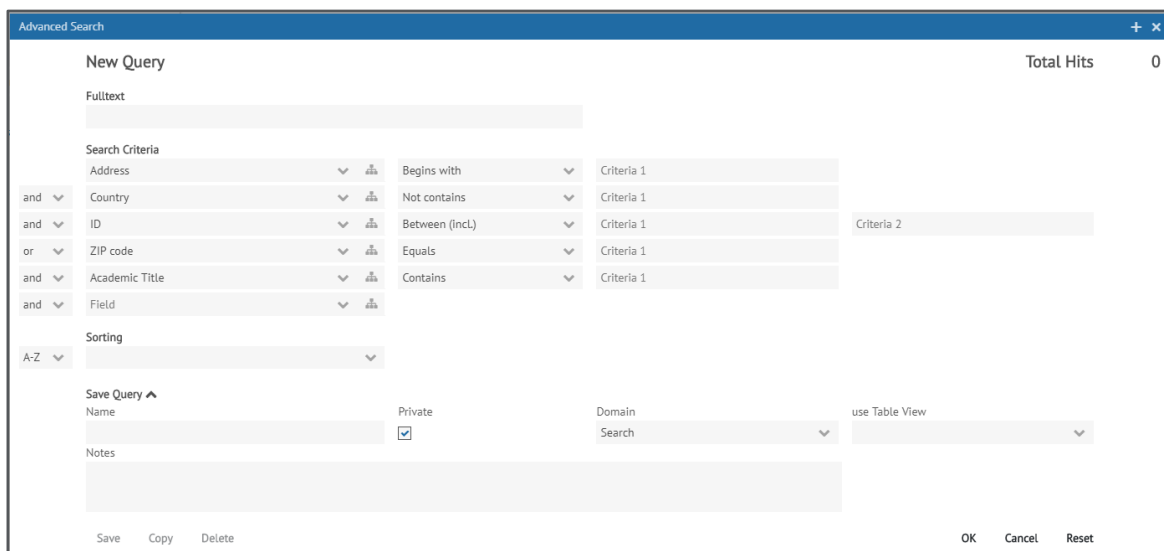


Figure 38: Field specific search

### 4.2.3 Advanced search

If you want to find a search term in a particular field, use the advanced search in the left side tab. When you select the **Advanced search** button, a dialog box will open:



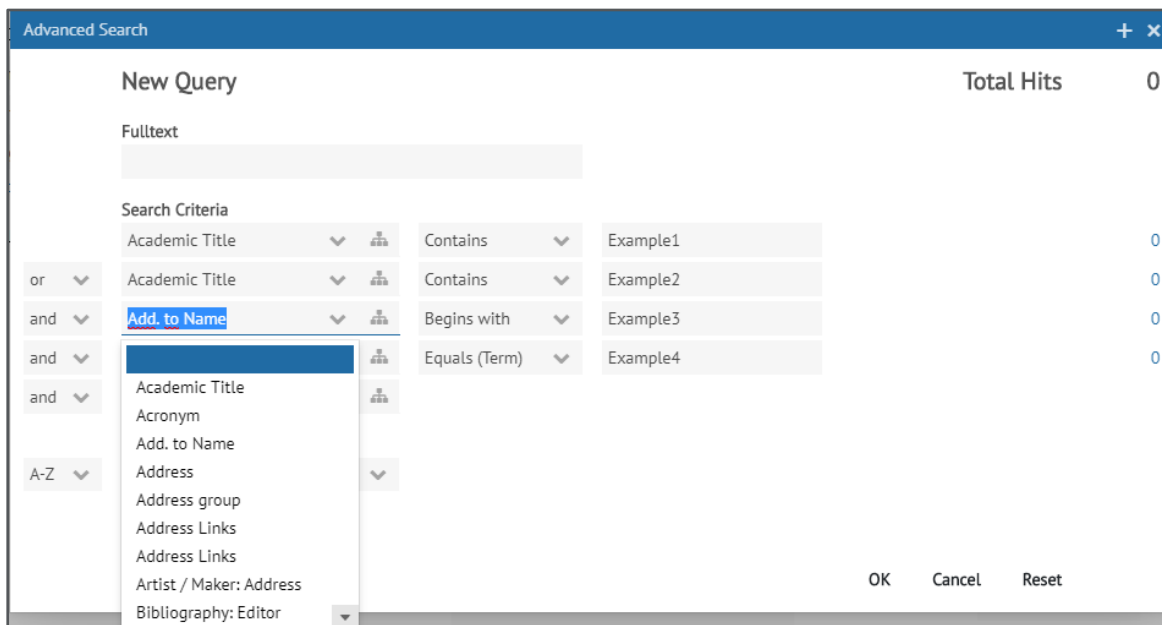
The dialog box is titled "Advanced Search" and contains a "New Query" section. It features a "Fulltext" search bar and a "Search Criteria" section with a table of criteria. The criteria are as follows:

Operator	Field	Operator	Value
	Address	Begins with	Criteria 1
and	Country	Not contains	Criteria 1
and	ID	Between (Incl.)	Criteria 1
or	ZIP code	Equals	Criteria 1
and	Academic Title	Contains	Criteria 1
and	Field		

Below the criteria table is a "Sorting" section with a dropdown menu set to "A-Z". At the bottom, there is a "Save Query" section with fields for "Name", "Private" (checked), "Domain" (Search), and "use Table View" (dropdown). There is also a "Notes" text area and buttons for "Save", "Copy", "Delete", "OK", "Cancel", and "Reset".

Figure 39: Advanced search, position and dialog box

**Removing search criteria** To remove a criterion from the advanced search, choose the blank space from the dropdown menu.



The dialog box is titled "Advanced Search" and contains a "New Query" section. It features a "Fulltext" search bar and a "Search Criteria" section with a table of criteria. The criteria are as follows:

Operator	Field	Operator	Value	Total Hits
	Academic Title	Contains	Example1	0
or	Academic Title	Contains	Example2	0
and	Add. to Name	Begins with	Example3	0
and		Equals (Term)	Example4	0

A dropdown menu is open for the "Add. to Name" field, showing a list of fields: Academic Title, Acronym, Add. to Name, Address, Address group, Address Links, Address Links, Artist / Maker: Address, and Bibliography: Editor. The "Add. to Name" field is highlighted. At the bottom, there are buttons for "OK", "Cancel", and "Reset".

Figure 40: Remove a search criteria

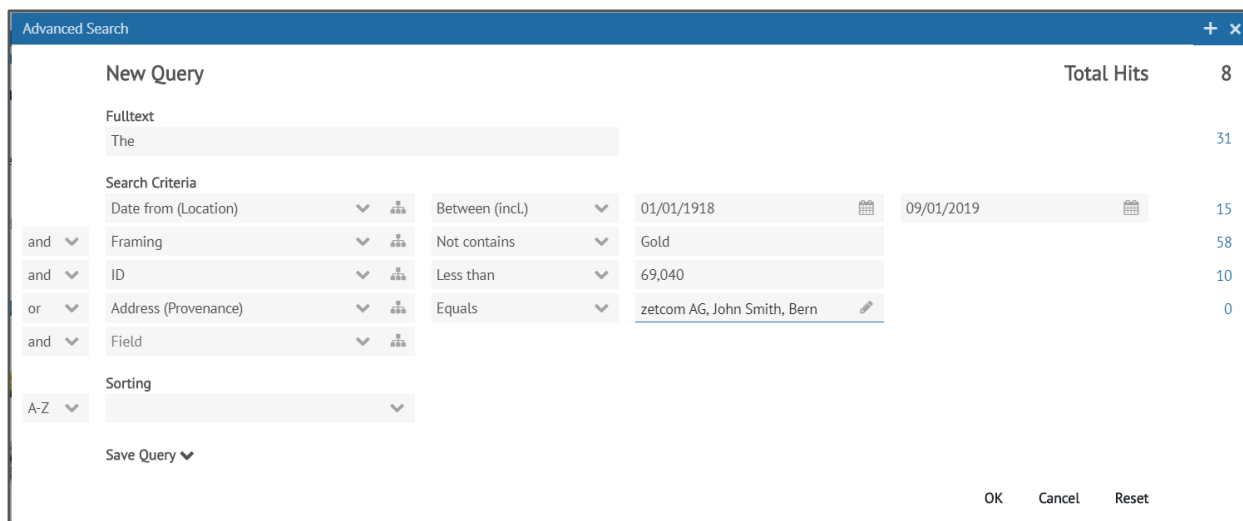
To refine your search, you can choose from a list of predefined criteria, the operators. The following search operators are available in the **Advanced search**:

Operator	Description
Greater than	Finds all records with a field value greater than the criterion (numerically and alphabetically). <code>20,000</code> will find all data with a field value greater than 20,000. <code>figurative</code> finds naive art, pop art, does not find abstract art.
Greater than or equal to	Finds all records whose field value is equal to or larger than the criterion (numerically and alphabetically).
Less than	Finds all records whose field value is smaller than the criterion (numerically and alphabetically).
Less than or equal to	Finds all records whose field value is equal to or smaller than the criterion (numerically and alphabetically).
Equals	Finds all records whose field contents correspond to the criterion. <code>trophy</code> finds all records where exactly the word trophy is stored.
Equals (Term)	Finds all records where a term of the field content corresponds to the criterion. <code>Berlin</code> finds Berlin, Bernau near Berlin, but not Newberlin.
Not equals (Term)	Finds all records where no term of the field content corresponds to the criterion. <code>New York</code> finds Washington D. C., Newark, Nashville, but not New York.
Not equals	Finds all records whose field content does not correspond to the criterion. <code>New York</code> finds New York City and Springfield, but not New York.
Is null	Finds all records whose field is not filled.
Is not null	Finds all the records whose field is filled.
Contains	Finds all records where any part of the field content corresponds to the criterion <code>Car .</code> finds car park, caramel or scarf.
Begins with (Term)	Finds all records where an arbitrary term of the field content starts with the criterion.
Begins with	Finds all records whose field content starts with the criterion.
Ends with (Term)	Finds all records where an arbitrary term of the field content ends with the criterion.
Ends with	Finds all records whose field content ends with the criterion.

Operator	Description
Between (incl.)	<p>Finds all records whose field value is equal to the first or second criterion or the field value is between the first and the second criterion (numerically and alphabetically).</p> <p>50.00, and 10,000.00, finds every value between 50.00 and 10,000.00.</p> <p>Austin and Detroit finds Austin, Bakersfield, Cincinnati ... and Detroit but not Kansas City, Miami or Aurora.</p>
Between (excl.)	<p>Finds all records whose field value is greater than the first and less than the second criterion (numerically and alphabetically).</p> <p>50.00, and 10,000.00, finds all values between 50.01 and 9,999.99</p> <p>Austin and Detroit finds Baltimore, Bakersfield, Cincinnati and Dallas, but not Austin, Detroit, Kansas, Miami or Aurora.</p>
Today	Finds all records of the current day within date fields.
Current Week	Finds all records of the current week within date fields.
Current Month	Finds all records of the current month within date fields.
Current Year	Finds all records of the current year within date fields.

The Advanced search contains two **Levels**:

- Level 1** In level 1, you carry out a search in one or more fields. The search output meets all the criteria that you choose (**and/or search**). Furthermore, you can sort your search results alphabetically (see **Sorting**).



The screenshot shows the 'Advanced Search' window with a 'New Query' section. The 'Fulltext' search term is 'The'. The 'Search Criteria' section includes several conditions: 'Date from (Location)' with a date range from '01/01/1918' to '09/01/2019', 'Framing' (Not contains), 'ID' (Less than 69,040), 'Address (Provenance)' (Equals 'zetcom AG, John Smith, Bern'), and 'Field'. The 'Sorting' section is set to 'A-Z'. The 'Total Hits' column shows 8 results. At the bottom, there are buttons for 'OK', 'Cancel', and 'Reset', and a 'Save Query' option.

Figure 41: Advanced search, level 1

- Level 2** In level 2, you have the possibility to assign a name for a query, to add notes to a search and save them.

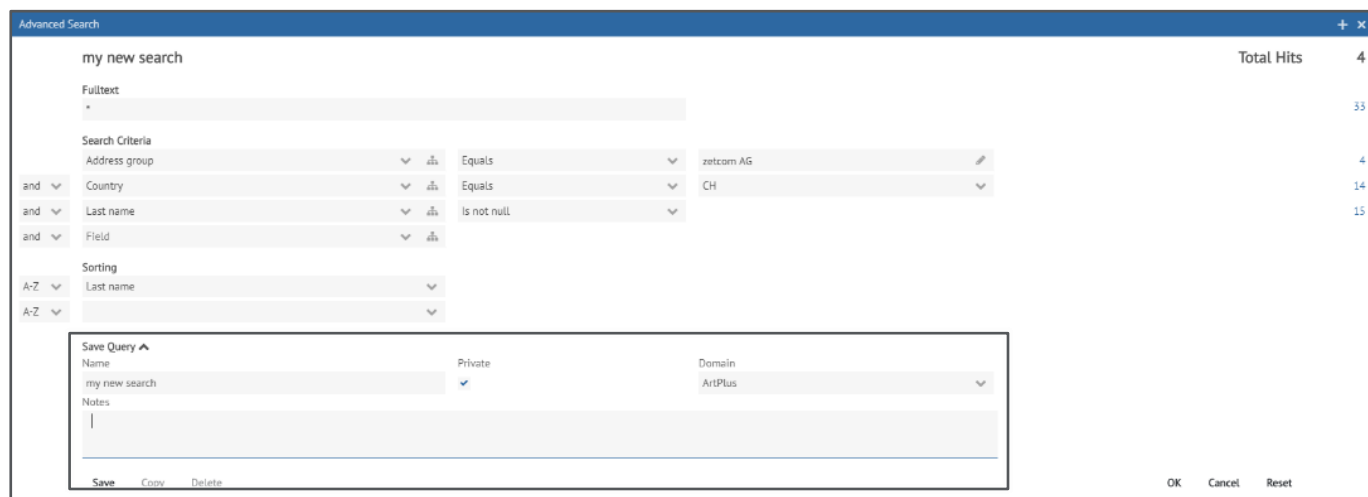
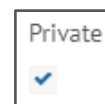


Figure 42: Advanced search, level 2

The **Private** checkbox, if checked, stores search queries only to your account.

If unchecked, the saved search will be available to every user.



The numbers on the upper right, **Total Hits**, are number of found objects

**Note** Your saved searches can be found in the upper part of the left side tabs in the selection list below the entry field for the full-text search, see *Figure 13: Left side tab, p. 11*.

#### 4.2.4 Clear search

Your search criteria entered remain active until they are explicitly removed. In the left side tab, you can delete your requirements completely.



**Note** Alternatively, you can change or delete your query in the dialog box of the **Advanced search** (2<sup>nd</sup> level).

### 4.3 Creating records

To create a record in a module, proceed as follows:

1. Click on the icon **add** in the footer of the data entry form. This opens an empty data entry form.
2. Enter all your information in the desired fields.
3. Save the record by clicking on the **save** icon in the data entry form.



**Note** Make sure that your user account has sufficient rights to create records. You will need add / create permission.

## 4.4 Duplicating records

As an alternative to applying a new record in an empty data screen, you can duplicate an existing record and modify the content. This is useful when a new record will have many similarities to an existing record.

1. Open the record you would like to duplicate.

Click on the icon **duplicate** in the data entry form.



The following dialog box appears:

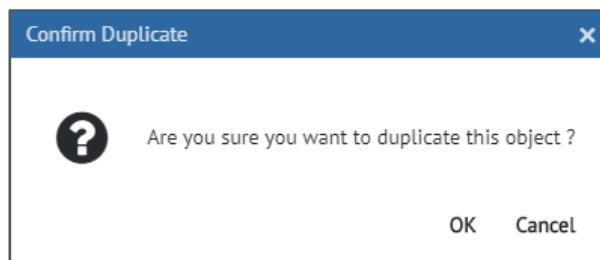


Figure 43: Query when duplicating records

2. Confirm the duplication by clicking **OK**.

Now there is a copied record from the original record available. You can now make individual adjustments in the fields of the data entry form.

3. Save the record by clicking on the **save** icon in the data entry form.



## 4.5 Deleting records

To delete a record, proceed as follows:

**Note** Make sure that your user account has sufficient rights to delete records. You will need delete permission. Make sure that the record to be deleted is called in the data entry form.

1. Click on the icon **delete** in the data entry form.



The following dialog box appears:

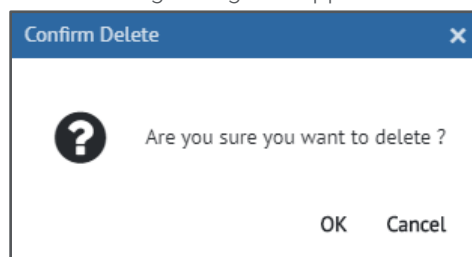


Figure 44: Query when deleting records

2. Confirm the deletion by clicking **OK**.

**Note** The deletion of records in RIA applications is always explicitly confirmed in order to prevent accidental deletions.

## 4.6 Linking records

To link records together, there are two options:

Either

1. Use a reference field (See *Chapter 4.1, Field types*) to link a record with a second, already existing record.

Or

2. Use the right side tab as a reference tab. Here, the reference to the record displayed in the data entry form is created by linking another record in the right side tab.

Below the steps are explained in detail:



## 4.6.1 Linking records using reference fields

To link a record with another record using a reference field (See *Chapter 4.1, Field types*), proceed as follows:

**Note** Make sure that the two records to be linked already exist. To store changes, you must have write permission.

1. Click on the **magnifying glass** icon in the reference field.

You will see a drop-down menu where you can navigate to the reference record.

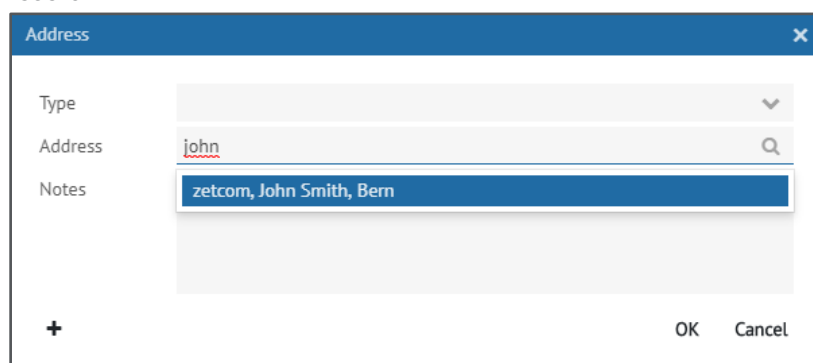


Figure 45: Example of a linking via reference field

Alternatively, you may click on the reference field and enter a search term for the record you want to reference.

2. Select the reference record by a single click.

The selected record is stored as a link in the field. The **edit** icon appears at the right edge of the field:



Figure 46: Example entry in reference field

By clicking on the link of the referenced record, it will be opened. If you want to change the reference, click on the **edit** icon. If you want to remove the reference, click on the **delete** icon.

If you want to delete the existing entry, hover over the entry you want to remove and click on the icon **bin**.



Figure 47: Delete entry in reference field

3. Confirm your selection with **OK**.
4. Save your changes by clicking on the **save** icon in the footer of the data entry form.



## 4.6.2 Linking records using the right side tab

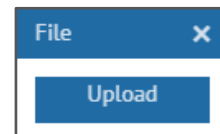
The right side tab gives you the ability to link one record with an attachment. For the attachment file, a record is automatically created and saved in your application. To create the link, proceed as follows:

**Note** Make sure you are in the record you want to link with a reference file. The right side tab must be expanded/unfolded. To store changes, you must have write permission.

1. Click on the icon **add** in the footer of the right side tab.



Depending on your RIA version, you will see a **File** selection dialog with which you can navigate to the reference file.



2. Navigate to the file you want to reference.
3. Select the file with one click.
4. Click to open it.

A dialog box appears showing the file upload status:

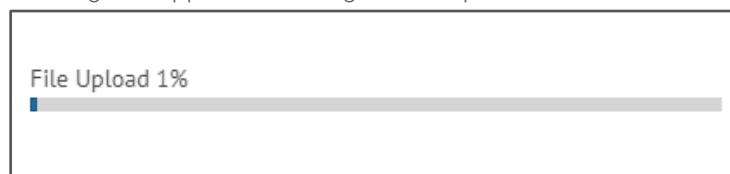


Figure 48: Example dialog box file upload

The file is loaded to the RIA server and a new record is created automatically.

5. Save your changes by clicking on the **save** icon in the data entry form.






## 4.7 Troubleshooting

### 4.7.1 Before contacting support

---

If an error message appears go through following steps:

- |   |   |
|---|---|
| <b>Restart browser</b>  | Try to close all browser tabs and restart your browser.   |
| <b>Clear browser cache</b> To clear the cache, following steps must be taken: |   |
| <b>Google Chrome</b>  | <ol style="list-style-type: none"> <li>1. At the top right, click <b>More</b></li> <li>2. Click <b>More tools&gt;Clear browsing data</b></li> <li>3. At the top, choose a time range. To delete everything, select <b>All time</b></li> <li>4. Next to "Cookies and other site data" and "Cached images and files," check the boxes</li> <li>5. Click <b>Clear data</b></li> </ol>   |
| <b>Mozilla Firefox</b>  | <ol style="list-style-type: none"> <li>1. Click the menu button Menu and choose <b>Options</b></li> <li>2. Select the <b>Privacy &amp; Security</b> panel</li> <li>3. In the <b>Cookies and Site Data</b> section, click <b>Clear Data...</b></li> <li>4. Remove the check mark in front of <i>Cookies and Site Data</i></li> <li>5. With <i>Cached Web Content</i> check marked, click the <b>Clear</b> button</li> </ol>  |
| <b>Microsoft Edge</b>   | <ol style="list-style-type: none"> <li>1. Click on the 3-lined Starhub button in the top right corner</li> <li>2. Click <b>Settings</b></li> <li>3. Click <b>Clear Browsing Data</b></li> <li>4. Click <b>Clear</b>.</li> </ol>    |
| <b>Safari</b>   | <ol style="list-style-type: none"> <li>1. Choose to show the optional Develop menu by going to Safari menu in the upper left corner, choose <b>Preferences &gt; Advanced &gt; "Show Develop menu in menu bar"</b>, then close out of Preferences</li> <li>2. Use the keyboard shortcut <b>Command+Option+E</b></li> </ol>   |

## 4.7.2 If the error still appears

If one of the following errors appear..

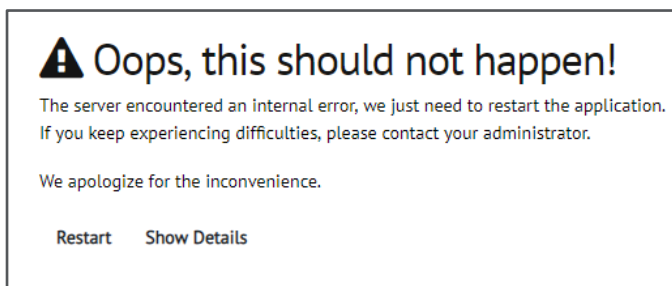


Figure 49: Possible error message

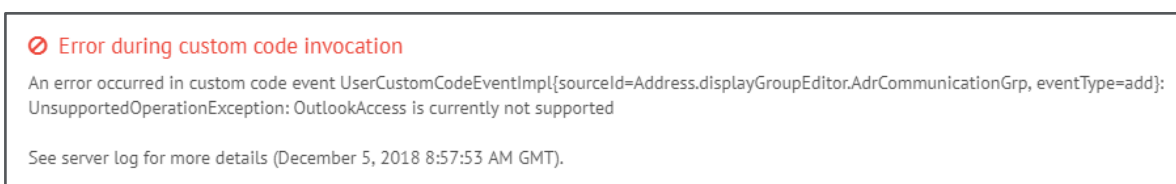


Figure 50: Error message custom code invocation

1. Click on **Show Details** or if it's a custom code error, as seen in *Figure 50: Error message custom code invocation*, take a screenshot and proceed to step 4.



Figure 49: Error message details

2. Click on the error message and press CTRL+A (CMD+A on Mac) or mark the error message with your mouse
3. Copy the text with CTRL+C (CMD+C on Mac)
4. Insert the text into an e-mail and send it to your zetcom support team
5. Furthermore, it helps the support team when you briefly explain what you or your staff were doing when the error message was received, e.g. which steps were performed before the error message occurred and a **timestamp**. This will help our team troubleshoot the error, as soon as possible.

## 5 Support

Should your RIA application stop working or you receive an error message during your use of the application, please report it, as described in 4.7.1 *Before contacting support*, p. 32, to your zetcom support team.

### Copy error message

It is very useful to copy the error message (Click **Show Details**) via the button **Copy to Clipboard** (or CTRL+C /CMD+C on Mac) and paste it into your email to us (shortcut Ctrl + V in MS Windows or Cmd + V on a Mac).



Figure 50: error message details

### Brief explanation

Furthermore, it helps the support team when you briefly explain what you or your staff were doing when the error message was received, e.g. which steps were performed before the error message occurred and a **timestamp**. This will help our team troubleshoot the error, as soon as possible.

### Contact support

Our support team will like to help you with questions and problems:

#### Switzerland & Global

Hotline: +41 31 320 10 03

[support@zetcom.com](mailto:support@zetcom.com)

#### Germany

Hotline: +49 30 6900 40 444

[support-berlin@zetcom.com](mailto:support-berlin@zetcom.com)

#### USA

Hotline: +1 720 874 9596

[support-na@zetcom.com](mailto:support-na@zetcom.com)

#### France

Hotline: +33 9 81 77 01 15

[paris@zetcom.com](mailto:paris@zetcom.com)

#### Spain

Hotline: +34 934 81 48 35

[barcelona@zetcom.com](mailto:barcelona@zetcom.com)

### Further information

For further information, please visit our website:

<https://www.zetcom.com/en/>

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