

Modes Complete version 1.4 upgrade overview

There are two upgrade packages. These cannot be used on a computer not already running Modes Complete. Download the 'new installation' packages instead.

1. Modes Complete Server version 1.4 – upgrade (UpgradeServer.zip)

The Modes Complete Server upgrade should be installed on the network server which is running the Modes Server application (*ModesServer.exe*). This is not required for 'standalone' installations.

The upgrade will replace the *NexusDB version 2.0804* database with *NexusDB version 4.5*. The previous desktop interface will be replaced by a web browser interface for the server settings. The *ModesServer4* service will replace the *ModesServer* service. This upgrade does not require a restart.

The Modes Complete Server upgrade will replace system files stored in the *modesresources* folder on the server, and update the *ModesControls* database.

Data files will not be modified.

2. Modes Complete workstation version 1.4 – upgrade (UpgradeWorkstation.zip)

The Modes Complete workstation upgrade should be installed all computers running Modes Complete (*ModesComplete.exe*), either 'standalone' or 'networked'.

The Modes Complete workstation upgrade will upgrade the *ModesComplete* desktop application to *version 1.4.2.33* (or above) and update the *Antenna House Formatter* component to *version 6.5*. This upgrade does not require a restart.

In a standalone installation the upgrade will replace system files stored in the *modesresources* folder, and update the *ModesControls* database.

In a networked installation, this upgrade will make no changes to system files or the *ModesControls* database.

Data files will not be modified.

If you are running Modes Complete in networked mode you must upgrade both the server and the workstations to complete the upgrade. The version 1.2 workstation will not work with the version 1.4 server, but version 1.3 and 1.4 workstations will work with either version of the server.

If the network server is also used as a workstation, the workstation upgrade should be installed on this machine in addition to the server upgrade.

Please follow the separate instructions provided for the server and workstation upgrades.

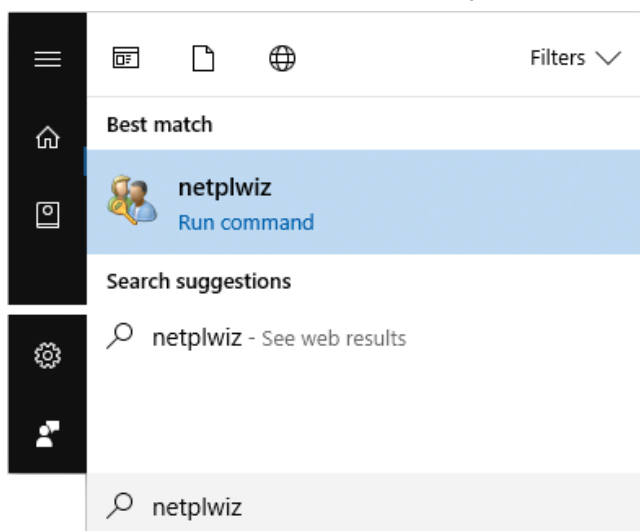
Before you start:

Backup your controls

We recommend that you make a backup of your *ModesControls* settings before you begin. Log on to Modes Admin with the username *administrator* and the corresponding password. Select *Export all controls* from the *Controls* menu, and save the resulting files as a backup of your current settings.

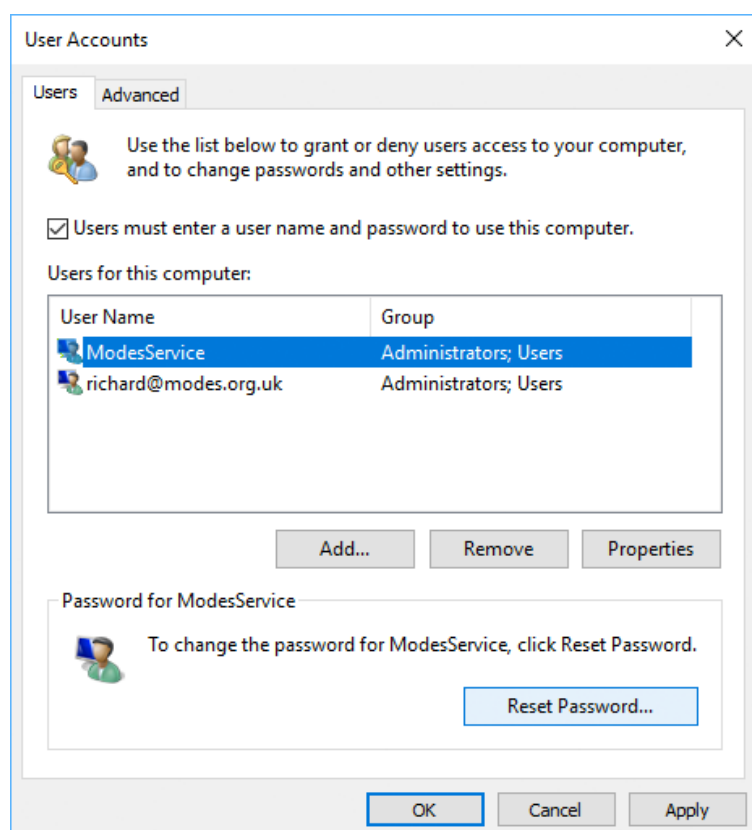
Service password

The server upgrade will prompt you to enter the a password for the *ModesService* user account. Please check the current password before you begin.



If you don't know the password, set a new one before you begin:

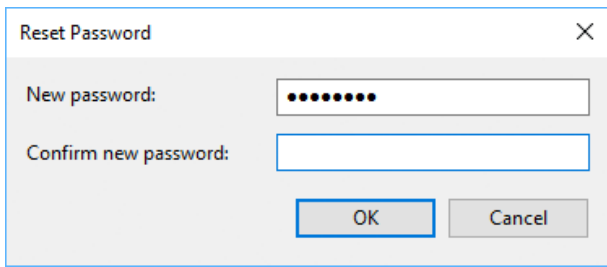
Type *netplwiz* into the Windows Start menu and select the *netplwiz* Run command.



Tick *Users must enter a user name and password to use this computer*.

Select *ModesService* from the list of users, then click *Reset Password*.

The password must be between 6 and 14 characters in length, include a mix of uppercase and lowercase characters, and at least one number or non-alphabetic character.



Enter the new password, then click **OK** to continue.

EAD application

If you are upgrading from version 1.2, the server upgrade will prompt you to delete the *EAD* application, which is a legacy feature no longer supported by Modes. The same option will appear if you are upgrading a standalone workstation from version 1.2. Although in most cases it will be safe to delete this application, you should check with users that *EAD* is not used for cataloguing archives in Modes.

All users should log out of Modes whilst you install the server upgrade. You are advised to stop the ModesServer service before installing the server upgrade.

Upgrading from server version 4.11

A small number of users will have previously installed Nexus DB version 4.11 as a patch for problems running on Windows Server 2012. Before installing the Modes Server 1.4 upgrade you *must* uninstall the *Modes Server V4* service. Contact Modes Support for the correct method to uninstall this service.

Installation password

Please obtain the **installation password** from Modes Support. This will allow you to open the installation packages and run the upgrade.

Post-upgrade options for updating the Object and Procedure applications

The upgrade includes options for importing new grids, indexes, templates and element groups, which can be applied at any time after the upgrade has been installed. These features are listed at the end of this document, on pages 8-11.

Users may want to apply all of these options, or choose which they apply. We recommend that they are applied by the Modes administrator, who will have an understanding of which new features they wish to adopt. Full instructions are given on pages 4-7.

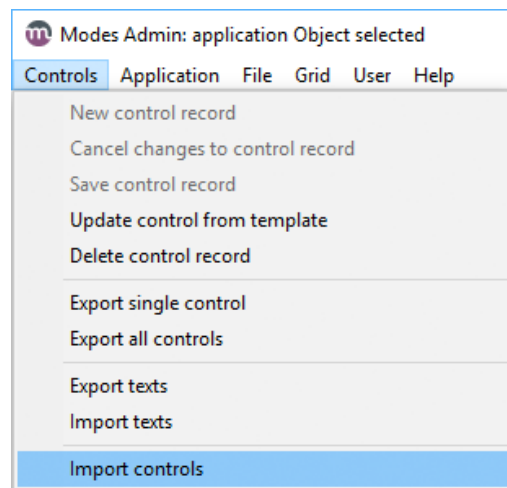
To begin, log on to Modes Admin with the username *administrator* and the corresponding password.

1 Updating grids

From the **Controls** menu select *Import controls*.

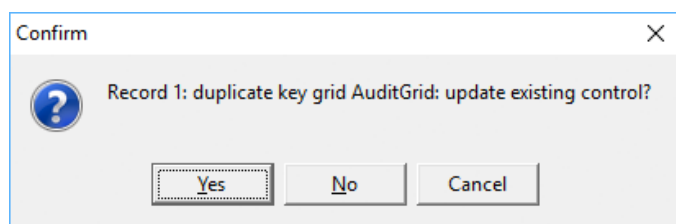
Browse to the folder
`\modesresources\Appfiles\Object`.

Select the file `grids.xml` then click **Open**.



You will be prompted to overwrite existing grids. Click **No** to retain the current version of each grid, or **Yes** to update it.

There are 13 Object grids.



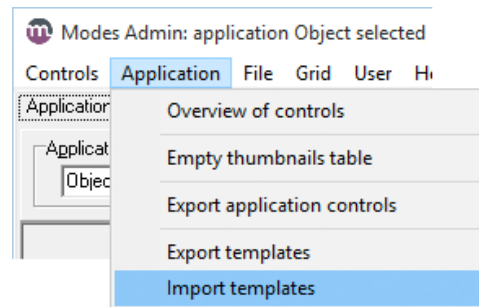
Repeat the process for the **Procedures** application. From the **Controls** menu select *Import controls*. Browse to the folder `\modesresources\Appfiles\Procedures`. Select the file `grids.xml` then click **Open**. Click **Yes** or **No** when prompted.

There are 8 Procedures grids.

2 Updating templates

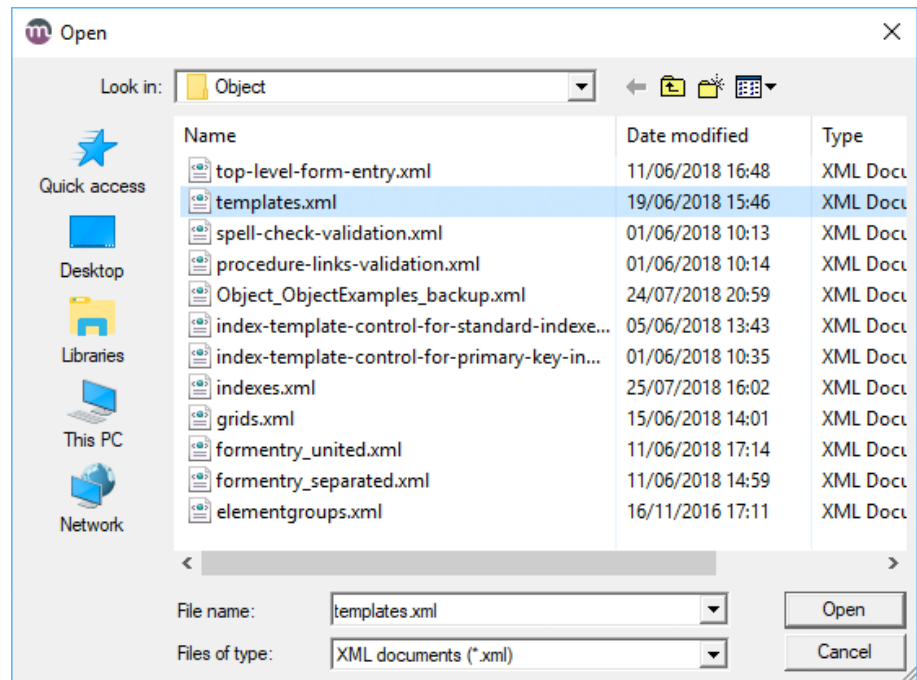
From the **Application** tab select *Object*.

From the **Application** menu select *Import templates*.



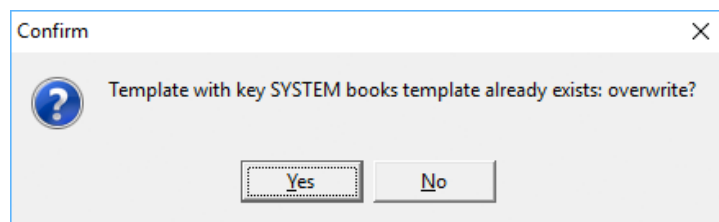
Browse to the folder `\modesresources\Appfiles\Object`.

Select the file `templates.xml` then click **Open**.



You will be prompted to overwrite existing templates. Click **No** to retain the current version of each template, or **Yes** to update it.

There are 23 Object templates.



Repeat the process for the **Procedures** application. From the **Application** tab select *Procedures*.

From the **Application** menu select *Import templates*.

Browse to the folder `\modesresources\Appfiles\Procedures`.

Select the file `templates.xml` then click **Open**. Click **Yes** or **No** when prompted.

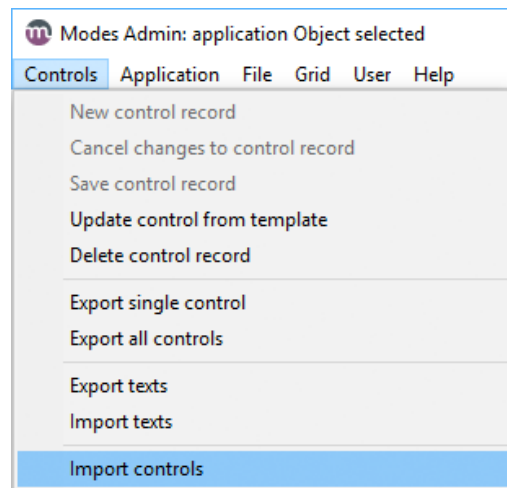
There are 19 Procedures templates.

3 Updating indexes

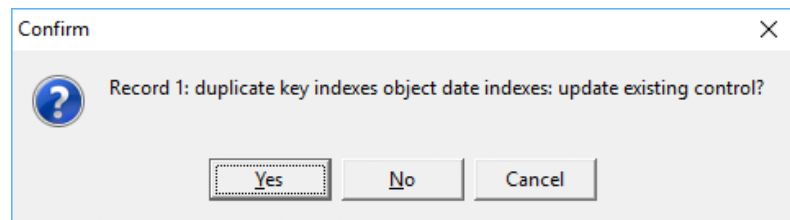
From the **Controls** menu select *Import controls*.

Browse to the folder
`\modesresources\Appfiles\Object`.

Select the file `indexes.xml` then click **Open**.



You will be prompted to overwrite existing index controls. Click **No** to retain the current version of each control, or **Yes** to update it. There are 8 Object index controls.



Repeat the process for the **Procedures** application. From the **Controls** menu select *Import controls*.

Browse to the folder `\modesresources\Appfiles\Procedures`.

Select the file `indexes.xml` then click **Open**. Click **Yes** or **No** when prompted.

There are 19 Procedures index controls.

Changes to indexes do not take effect until you restructure the data files:

4 Restructuring data files

From the **Application** tab select *Object*.

From the **Application** menu select *Restructure files*.

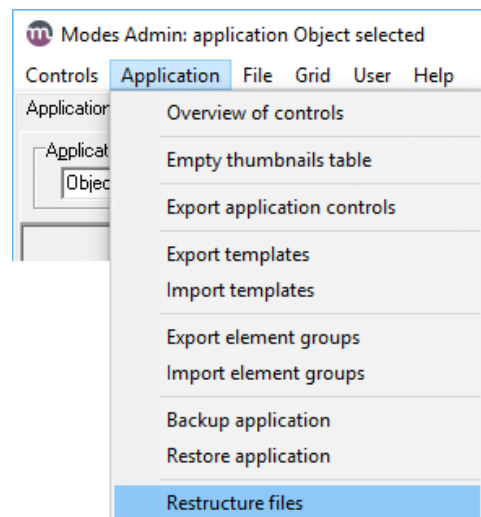
Click **OK** when the **Confirmation** window appears.

Repeat the process for the **Procedures** application.

From the **Application** tab select *Procedures*.

From the **Application** menu select *Restructure files*.

Click **OK** when the **Confirmation** window appears.



Note: restructuring can be a lengthy process if you have a large number of data files, or large numbers of records.

5 Updating element groups

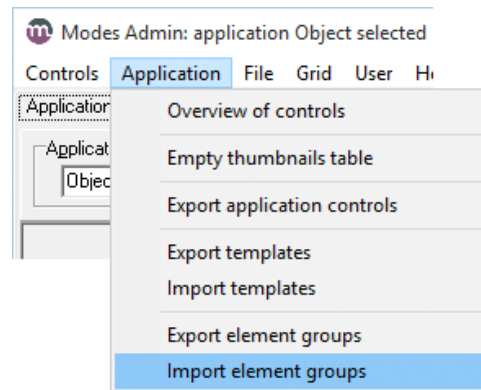
From the **Application** tab select *Object*.

From the **Application** menu select *Import element groups*.

Browse to the folder

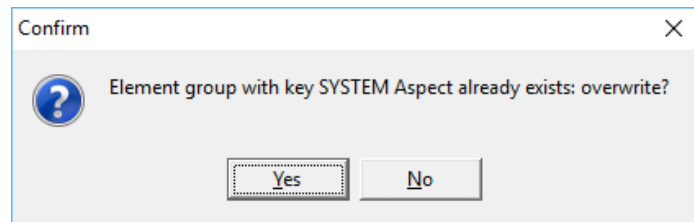
`\modesresources\Appfiles\Object`.

Select the file `elementgroups.xml` then click **Open**.



You will be prompted to overwrite existing element groups. Click **No** to retain the current version of each element group, or **Yes** to update it.

There are 139 Object element groups.



Repeat the process for the Procedures application.

From the **Application** tab select *Procedures*.

From the **Application** menu select *Import element groups*.

Browse to the folder `\modesresources\Appfiles\Procedures`.

Select the file `elementgroups.xml` then click **Open**. Click **Yes** or **No** when prompted.

There are 68 Procedures element groups.

Grids, Indexes and Templates

The following templates, grids and indexes are included with the version 1.4 upgrade package.

Object application

Grids:

_Inventory	Summary - association
Accessions register	Summary - association
Classifications	Summary - content
Collections care	Summary - content
Image lightbox	Summary - description
Multimedia	Summary - field collection
Object locations	Summary - field collection
Record editing history	Summary - production

Indexes:

_source templates	Multimedia filenames
Classifications	Object names
Dates	Object simple names
Entry number	Other identity numbers
Events	People and organisations – acquired from
How acquired	People and organisations – associated
Identity number	Periods
Image filenames	Places
Item marked	Recording progress
Locations – current location	Titles
Locations – normal location	Word search

Templates:

_inventory template	digital image template
archaeology template	document template
books template	ethnography/folk life template
coins template	event template
costume template	fine art template
decorative art template	geology template

Templates (continued):

loan in template

medals template

mineral specimen template

natural history template

oral history template

organisation template

person template

photograph template

place template

social history template

technology/transport template

Procedures application

Grids:

Acquisition

Loans in

Loans out

Movements

Object entry

Object exit

Record editing history

Indexes:

_source templates

Acquisition reference number

Audit reference number

Collections review number

Condition check reference number

Conservation number

Dates - date of entry

Dates - date of exit

Dates - date returned

Dates - date returned

Dates - delivery date

Dates - planned removal dates

Dates - removal dates

Dates - return due

Dates - return due

Disposal reference number

Entry number

Entry number

Exit number

Exit number

Incident number

Insurance or indemnity reference number

Loan in number

Loan out number

Locations - new location

Locations - previous location

Movement number

Object names

Peoples names

Process reference number

Reasons for entry

Reasons for exit

Reproduction number

Use of collections reference number

Valuation reference number

Word search

Templates:

acquisition template

audit template

collections review
template

condition check/technical
assessment template

conservation and
treatment template

disposal template

exhibition template

indemnity template

insurance template

loan in template

loan out template

loss/damage template

movement template

object entry template

object exit template

process template

reproduction template

use of collections
template

valuation template

