

# Modes Complete version 1.5 upgrade overview

There are two upgrade packages. These can be used only on computers already running Modes Complete. Otherwise you must download the 'new installation' packages instead.

## 1. Modes Complete server version 1.5 – upgrade

*upgradeModesCompleteServer1\_5.exe*

The Modes Complete Server upgrade is not required for 'standalone' installations.

It should be installed on the network server which is running the Modes Server application (*ModesServer.exe* or *ModesServer4.exe*).

Upgrading from version 1.2 or 1.3 will replace the *NexusDB version 2.0804* database with *NexusDB version 4.5*. The *ModesServer4* service will replace the *ModesServer* service and previous desktop interface will be replaced by a web browser interface for the server settings. Upgrading from version 1.4 these features have been installed already and will not be changed.

The upgrade will replace system files stored in the *modesresources* folder on the server, and update the *ModesControls* database. **Data files will be restructured (reindexed) but data will not be modified.** Locally modified versions of standard indexes and other settings will be replaced by standard versions.

The server upgrade does not require a restart.

## 2. Modes Complete workstation version 1.5 – upgrade

*upgradeModesCompleteWorkstation1\_5.exe*

The Modes Complete workstation upgrade should be installed on all computers running Modes Complete (*ModesComplete.exe*), either 'standalone' or 'networked'. It is not required on the network server, unless that is also used as a workstation.

The Modes Complete workstation upgrade will upgrade the *ModesComplete* desktop application to *version 1.5.1.1* (or above) and update the *Antenna House Formatter* component to *version 6.6*.

In a standalone installation the upgrade will replace system files stored in the *modesresources* folder, and update the *ModesControls* database. **Data files will be restructured (reindexed) but data will not be modified.** Locally modified indexes and other settings may be replaced by standard versions.

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

The workstation upgrade does not require a restart.

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 1.5 server. The version 1.5 workstation will not work with a version 1.2 or 1.3 server.

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

## Before you start:

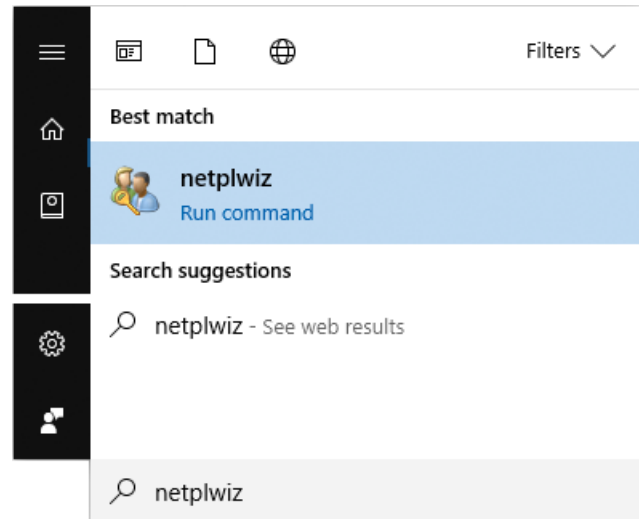
### Check the service password

The server upgrade will prompt you to enter the password for the existing *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.

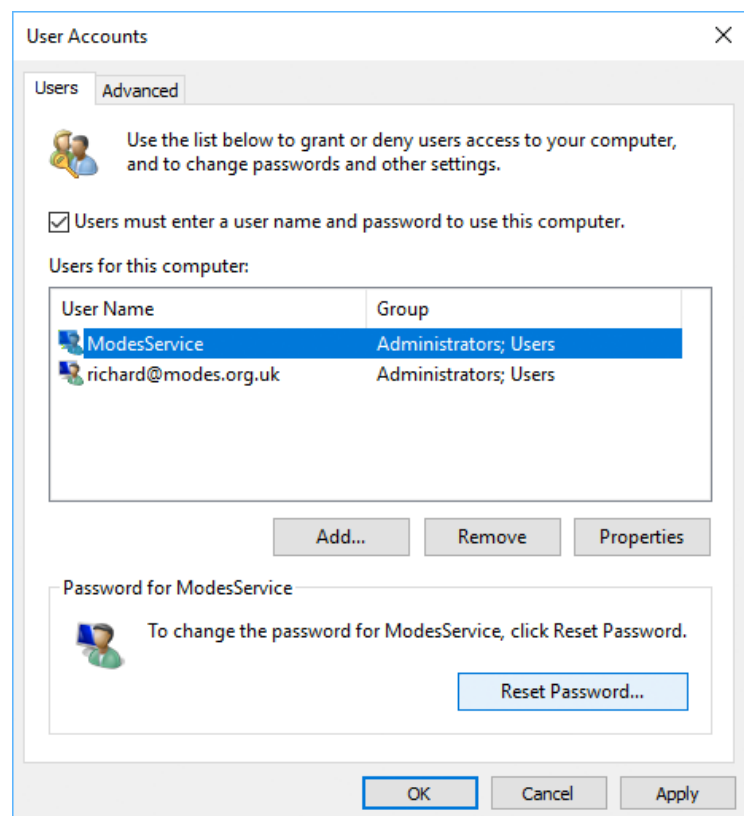


Tick *Users must enter a user name and password to use this computer*.

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.



### Installation password

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

## NexusDB password

Users installing the Modes Server upgrade should obtain a **server administration username and password** from Modes Support to restrict access to the Modes Server (*Nexus DB Server Administration*) interface.

## Modes administrator password

In order to introduce a new security feature, this upgrade will re-set the Modes administrator password to the default, which is the same as the installation password. You might choose to re-set this password after installing the upgrade.

## 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.

This backup will be required if there is any need to recover local settings after the upgrade. Contact Modes Support for help with restoring settings.

## 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 (recommended), you should check with users that the Modes *EAD* application is not used for cataloguing archives in Modes.

## Adding support for cataloguing archives to ISAD(G) standards

Some users will want to add distinctive templates, reports and other settings for cataloguing archives to *ISAD(G)* standards. To avoid repeating the lengthy file restructure process, this option is best installed **BEFORE** running the upgrade to version 1.5. Users should contact Modes Support to download the latest version of the archives add-on package and instructions for installation.

## 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. This can be recognised if *Modes Server V4* appears in the list of services, and the *ModesServer* service is stopped or disabled:

Before installing the Modes Server 1.5 upgrade you **must** uninstall the *Modes Server V4* service. Contact Modes Support for the correct method to uninstall this service.

## Log out users

All users must log out of Modes whilst you install the server upgrade. Allow a couple of hours downtime.

# 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 page 7 onwards.

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.

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

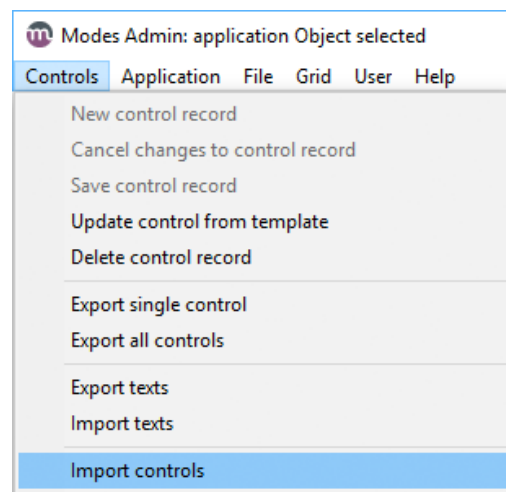


## 1 Updating grids

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

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

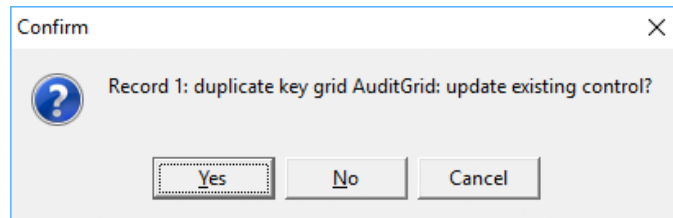
Select the file `grids.xml` then click **Open**.



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.

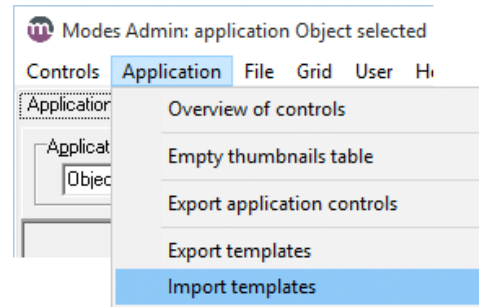
From the **Controls** menu select *Import controls*. Browse to the folder  
`\modesresources\appfiles\Procedures`. Select the file `grids.xml` then click **Open**. Click **Yes** or **No** when prompted.

There are 8 Procedures grids.

## 2 Updating templates

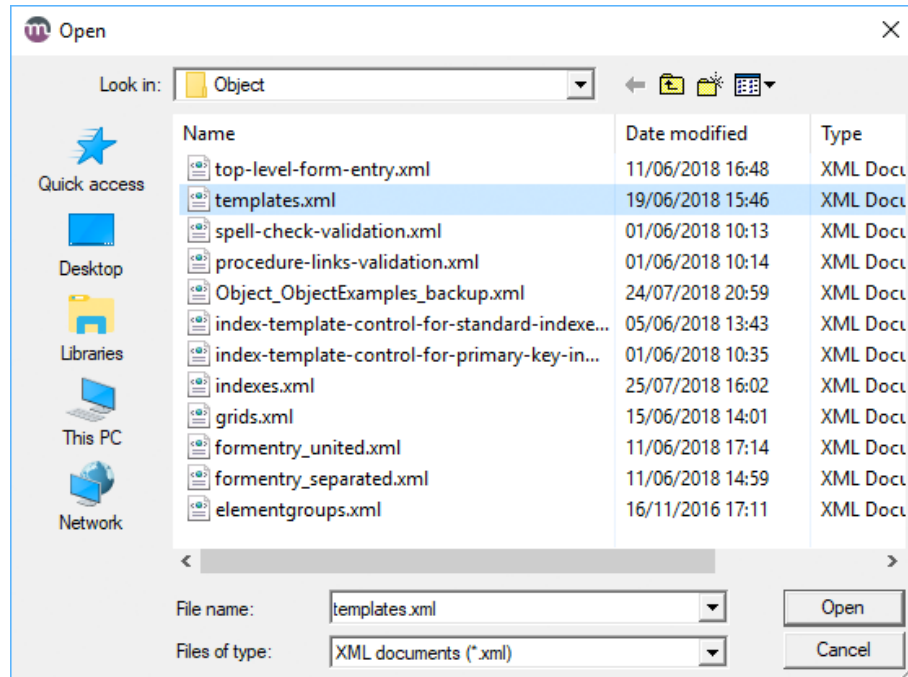
From the **Application** tab select *Object*.

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



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

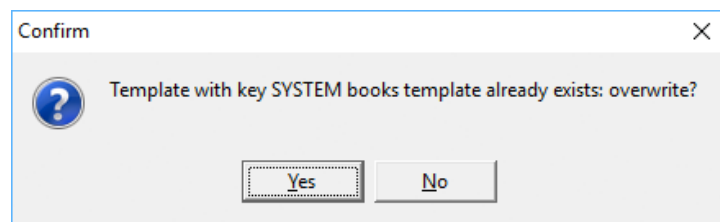
Select the file `templates.xml` then click **Open**.



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 element groups

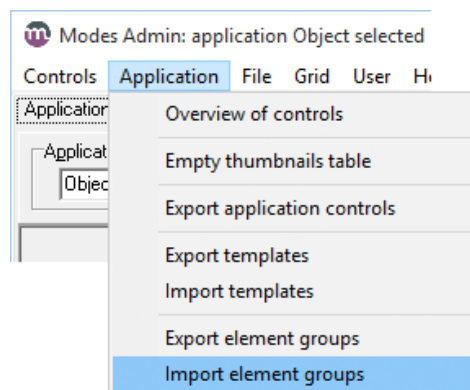
From the **Application** tab select *Object*.

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

Browse to the folder

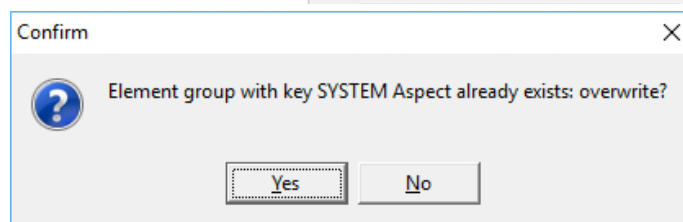
`\modesresources\appfiles\Object`.

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.

### 4 Updating termlists

The following standard termlists have been updated:

acquisition role Added *funding source* and *source*.

deposit role Added *shipper* and *shipper's contact*.

loanin role Added *lender's authoriser*.

procedure role Added all of the above.

record type Added *acquisition record, audit record, collections review record, condition check record, conservation record, damage/loss record, disposal record, event record, indemnity record, insurance record, loan in record, loan out record, movement record, object entry record, object exit record, person record, place record, records management record, repository, reproduction record, use of collections record* and *valuation record*.

Added *file, fonds, item, series, sub fonds and sub series* as substitutes for *file record, fonds record, item record, series record, subfonds, sub fonds record, subseries and sub series record*.

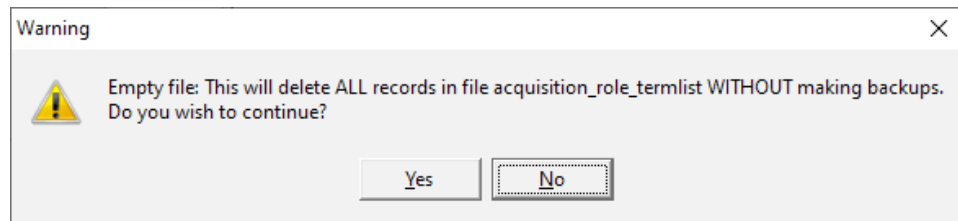
These terms can be added to existing term lists, or may be used to replace existing termlists. Users who have developed their own versions may prefer to retain their local versions.

Open Modes Admin and select *Termlist* from the **Application** tab.

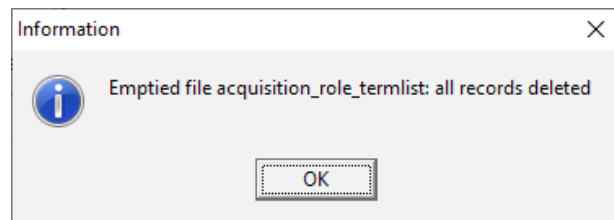
Then from the **File** tab select the first of the termlists you wish to update (for example, *acquisition\_role\_termlist*).

To **replace** the existing termlist, choose *Empty file* from the **File** menu. **Skip this step if you intend to add the new terms to your existing termlist.**

Click **Yes** to continue.



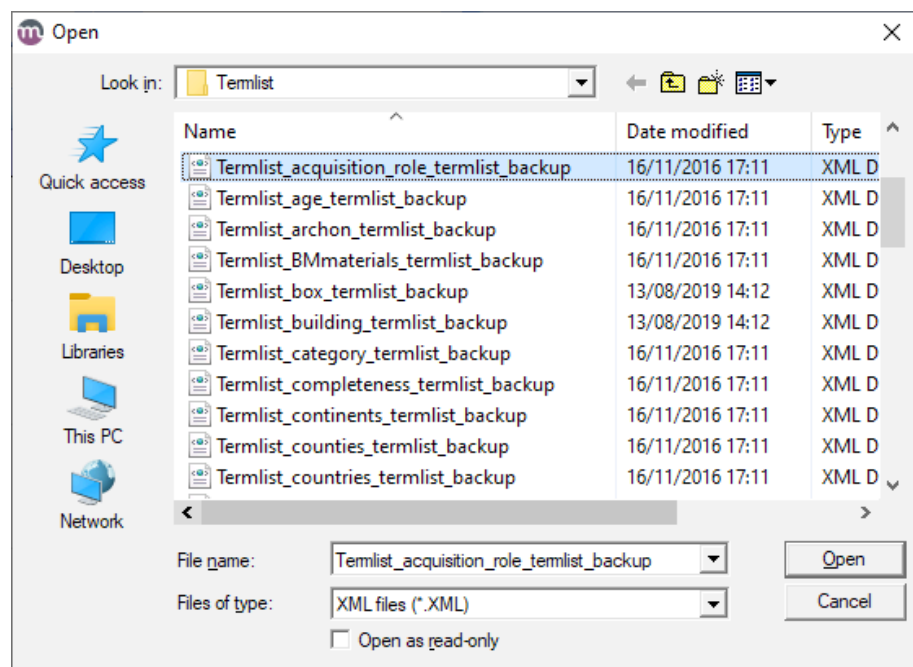
Click **OK** to continue.



Now choose *Import* from the **File** menu.

Click **Select file to import**, then select the appropriate backup file from the folder `\modesresources\appfiles\Termlist`.

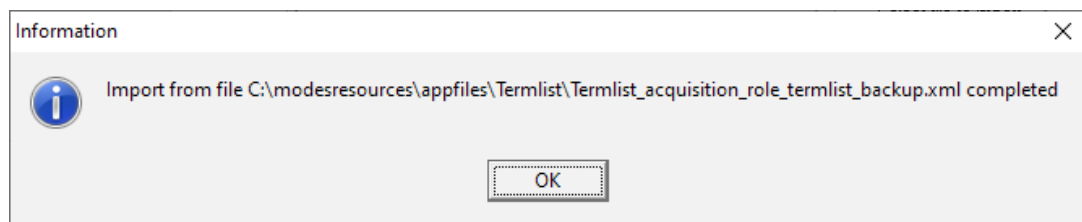
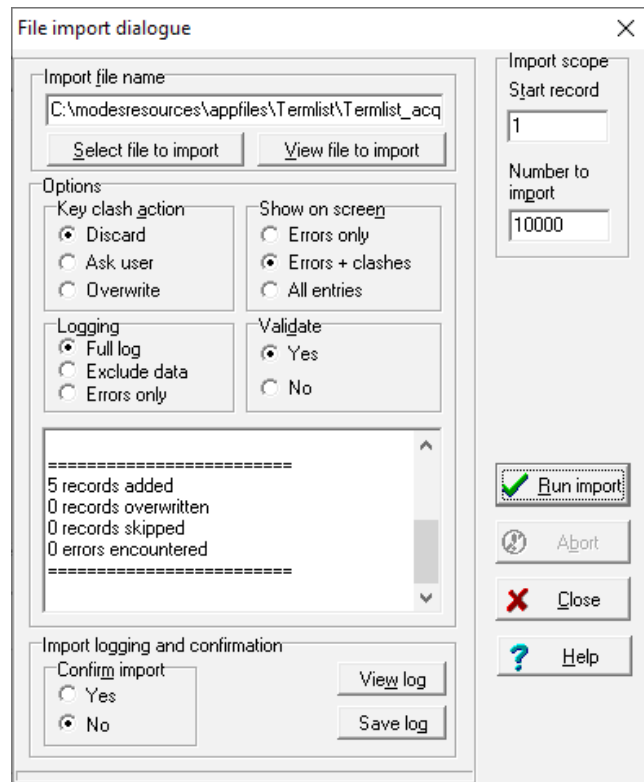
Click **Open**.



Click **Run Import**.

If you previously emptied the file, then all of the new terms will be added to the file.

If you did not empty the file, then only the new terms which were not already in the file will be added.



Click **OK** to finish.

Repeat for each termlist you need to update.

## 5 Updating indexes

The version 1.5 upgrade will automatically restructure your data files. This means that all files will be re-indexed using the standard indexes supplied with the upgrade, together with any locally created indexes.

Local versions of standard index controls will be replaced by the standard versions. Where this is an issue, the local version can be recovered from the controls backup – see *Before you start* above.



## Grids, Indexes, Templates and Termlists

The following templates, termlists, grids and indexes are included with the version 1.5 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
Materials	

## Templates:

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

geology template  
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

## Termlists:

age  
category  
classification  
completeness  
continents  
counties  
countries  
CT arch names  
denominations  
dimension  
field collection method  
form  
gender  
hazard icons

Herts simple names  
materials BM  
object condition  
orientation  
originalcopy  
period  
phase  
recordtype  
sex  
stratigraphy  
subjects SHIC  
subjects SSH  
taxontype  
yesno

## 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 - delivery date

Dates - planned removal dates

Dates - removal dates

Dates - return due

Disposal reference number

Entry number

Exit number

Incident number

Insurance or indemnity reference number

Item list - object identity number

Item list - object names

Loan in number

Loan out number

Locations - new location

Locations - previous location

Movement number

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

### Templates (continued):

reproduction template

valuation template

use of collections template

### Termlists:

acquisition method

movement role

acquisition role

object condition

age

orientation

category

originalcopy

classification

period

completeness

phase

continents

photograph digital image

counties

photograph direct positive

countries

photograph negative

CT arch names

photograph photograph

denominations

photograph photograph album

deposit role

photograph photographic print

despatch role

photograph photomechanical print

dimension

photograph postcard

entry reason

photograph postcard album

exit reason

photograph simple name

field collection method

photograph transparency

form

recordtype

gender

sex

hazard icons

stratigraphy

Herts simple names

subjects SHIC

loanin role

subjects SSH

loanout role

taxontype

materials BM

yesno

## Object application (archives add-on)

### Grids:

Archives overview

Archives published items

Archives collections care

Archives scope and content

Archives physical description

Archives administrative/biographical history

### Indexes:

Document forms

Document general forms

Levels of description

Parent records

### Templates:

ISAD(G) repository level template

ISAD(G) fonds/subfonds level template

ISAD(G) series/subseries level template

ISAD(G) file/item level template

### Termlists:

archon\_code

recordtype-archives