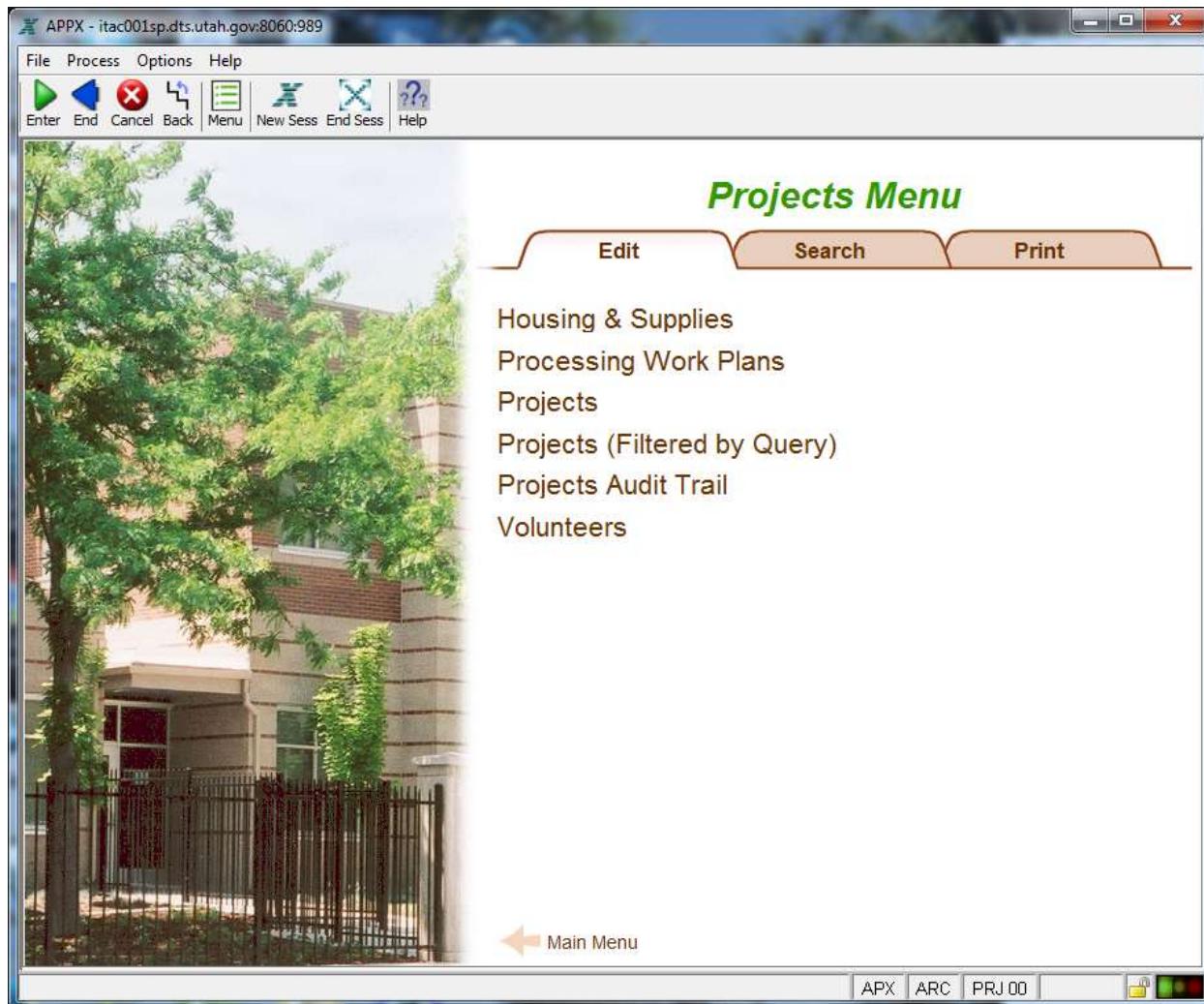


Projects Menu

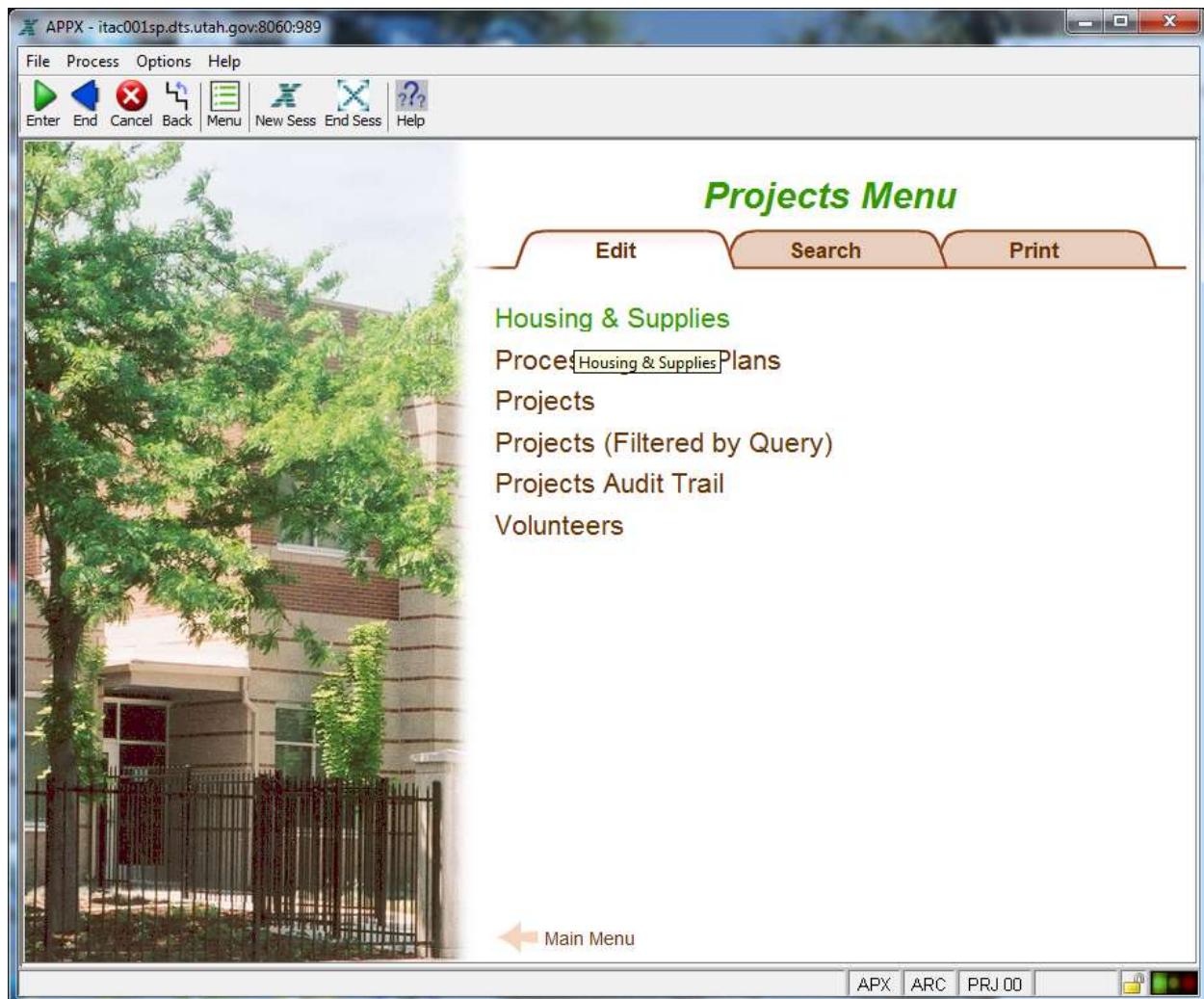
June 9, 2016

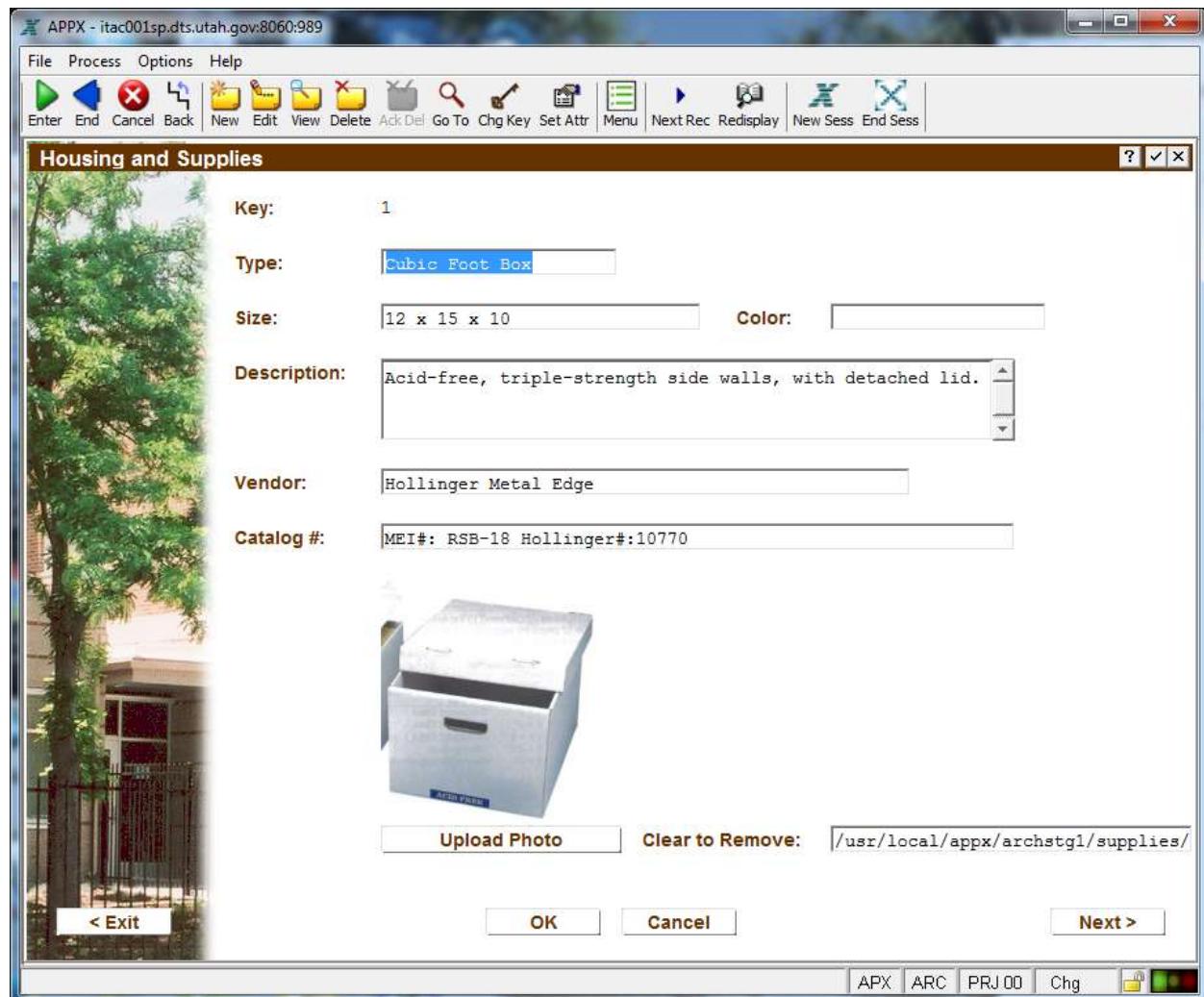
The Projects menu is a place to identify projects that involve record series and perhaps multiple staff or volunteers to accomplish. Identifying a project helps communicate to other staff what is being worked on in relation to the records, especially as projects tend to span years and encompass staff changes over the course of a project's existence.

From the Main Menu, click Projects Menu.

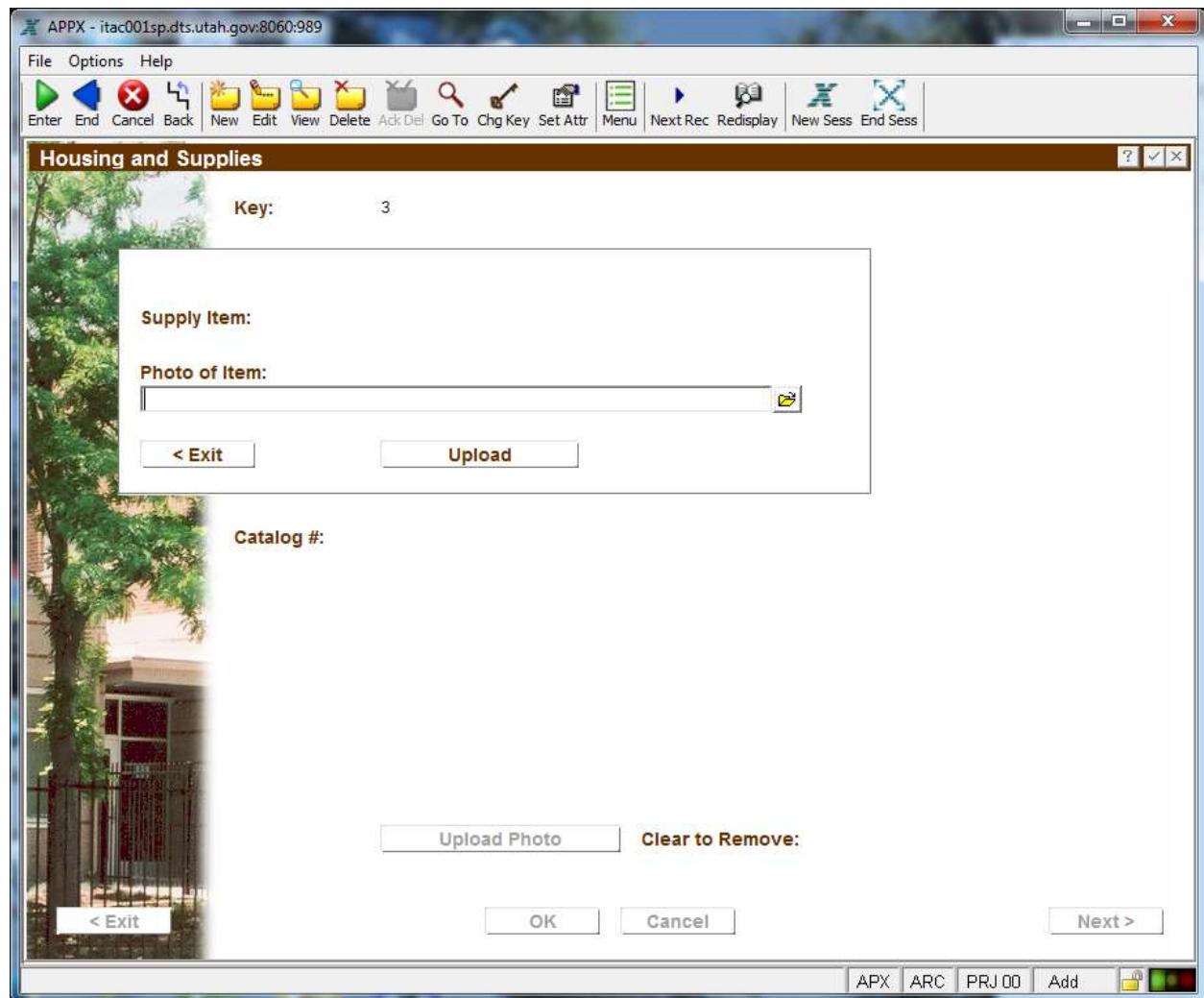


Click on Housing & Supplies:

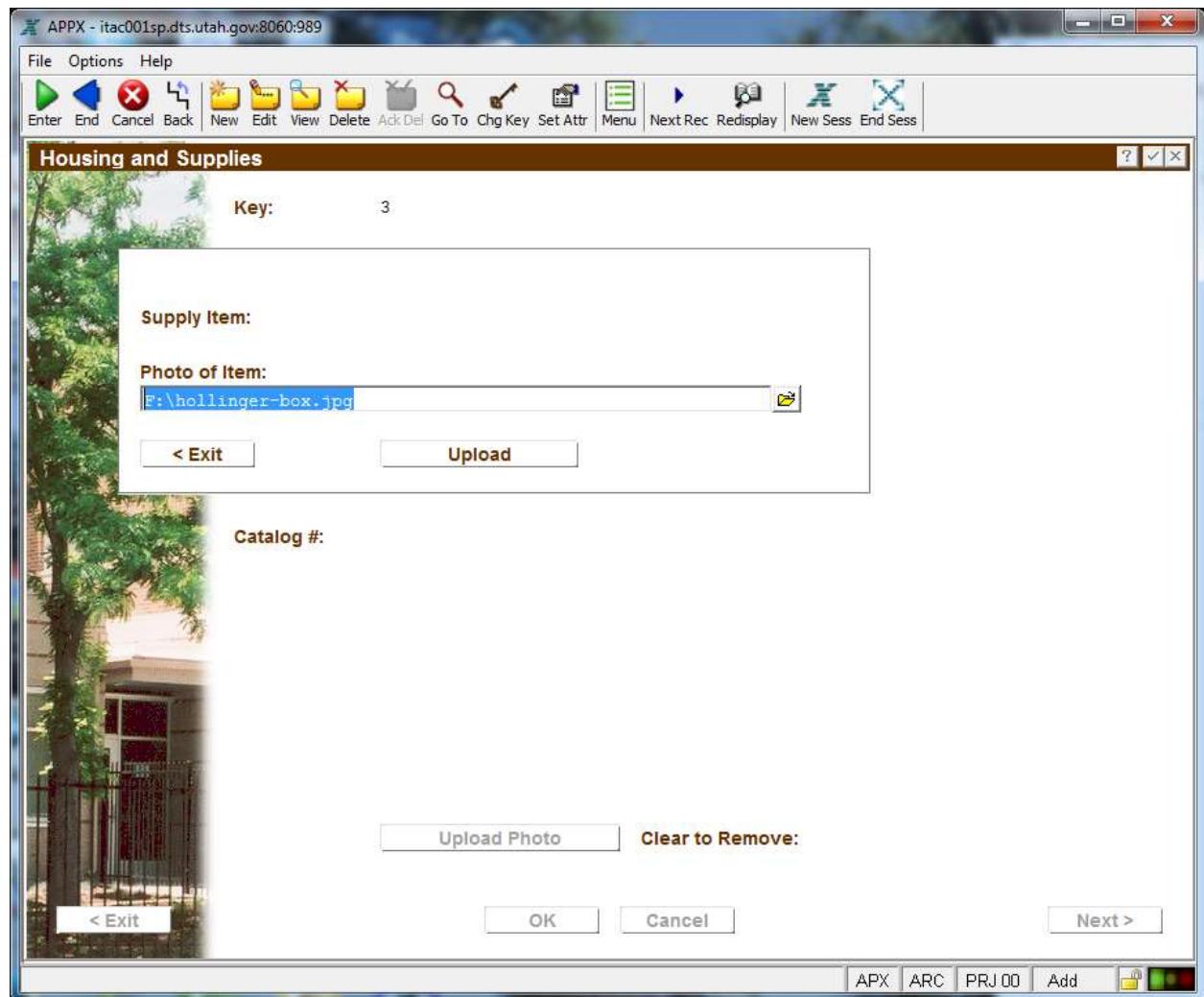




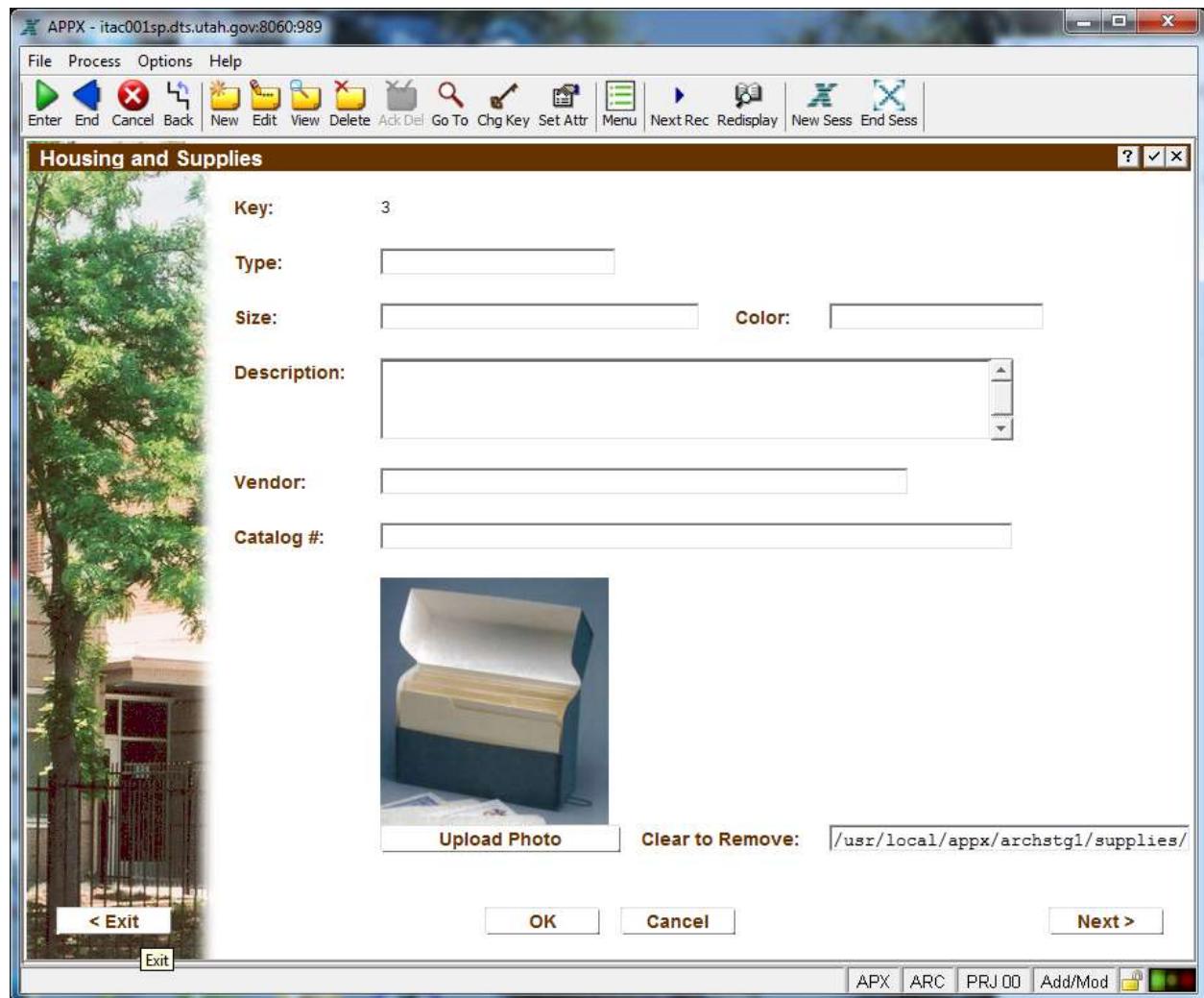
This screen is for identifying supplies needed for processing projects, so that the supplies can be quantified, giving the Processing supervisor needed information when approving processing projects. A photo of the item can be uploaded by clicking the Upload Photo button:



Click the folder icon at the right of the field to choose a file.

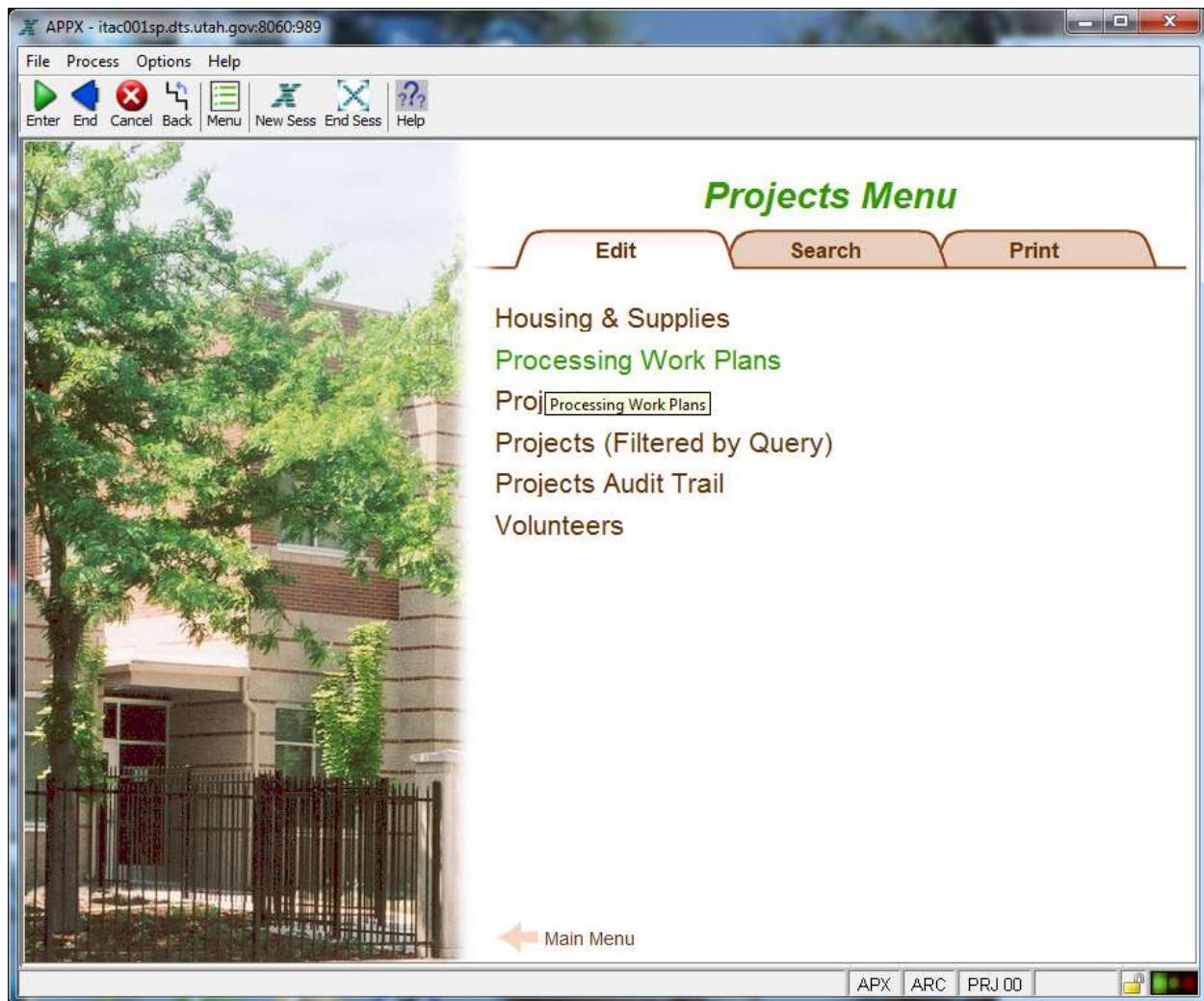


Then click Upload to upload it:



You may remove the image by deleting the text in the Clear to Remove field. Save your changes by clicking OK, or click Cancel to return to the Projects menu.

Click Processing Work Plans:



Bring up an existing record by choosing the initials of a Processor, then press Enter or click Ok/Next Page.

APPX - itac001sp.dts.utah.gov:8060:989

File Process Options Help

Enter End Cancel Back | New Edit View Delete Ack Del Go To Chg Key Set Attr Menu | Next Rec Redisplay | New Sess End Sess

Processing Plan

Key: 1 Added By: APX 04/15/2013 Changed By: APX 09/11/2013

Title:

Processor: GMS Strack

List series you expect to have at the end of this project, including creating agency, proposed series titles, and dates.

New Series: Daily journal, 2002-2004; Declarations and proclamations, 1995-2003; Governor's Olympic collection; Governor's Report on the Worker's Compensation Fund, 2003. See preliminary survey of folder

Describe the research value of the series and recommend if they should be processed or deaccessioned.

Appraisal: Governor's records are largely historical. Some weeding may occur for exact duplicates, blank forms, and "housekeeping" documents.

Summarize holdings (including date spans) in paper, microfilm, and fiche for each series. What format(s) should be retained?

Holdings: Project is focused on electronic records copied from Governor's office (as such, no real official transfer).

How is each series currently arranged? Are there any obvious gaps in the series? Describe any prior arrangement.

Arrangement: Records will be arranged similar to paper counterparts for existing series, for new series most if not all chronological by date. Original order does not apply with the method of transfer that

< Exit Existing Series Ok/Next Page Cancel Approve Print Next Record >

APX ARC PRJ 00 Chg



The Processing Plan fields automate a paper form that has been used for years in describing what next processing project to tackle. The data is structured in an unusual way in AXAEM, in that it takes two screens to list all the fields for a single record. Click Ok/Next Page to view the next screen of fields.

APPX - itac001sp.dts.utah.gov:8060:989

File Process Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Processing Plan Page 2

Have the series been scheduled? If so, what portion, if any, do you propose to process?

Retention: For new series, describing what we already have so permanent in Archives

Discuss how the series are currently classified and recommend how they should be classified under GRAMA or other statute or rule.

Classification: Public. If private/personal data is found, may be weeded out if not significant or notated in series record.

If special storage containers will be needed, other than the standard cubic foot, grey Hollinger, or book boxes, describe them here.

Preservation: n/a

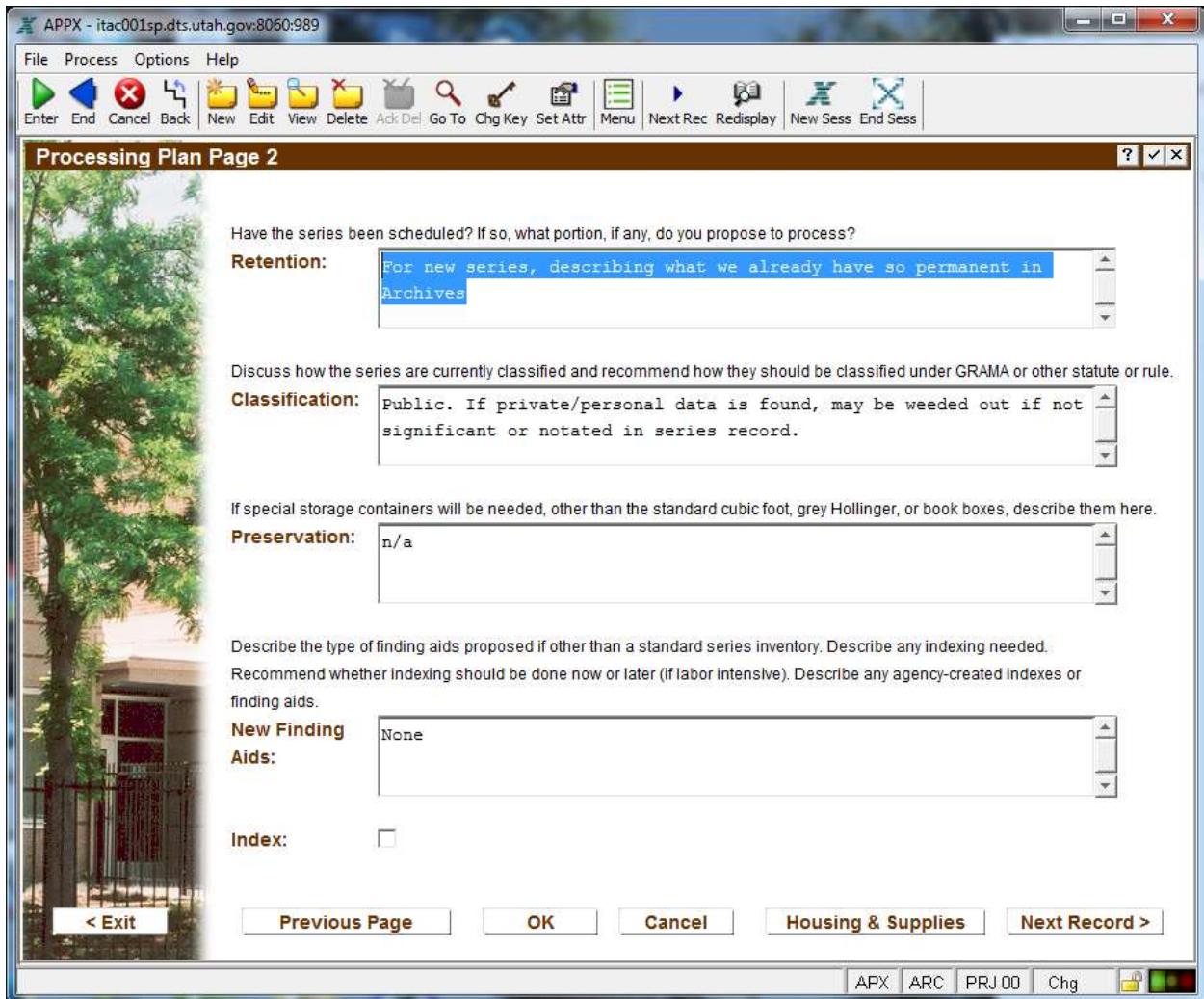
Describe the type of finding aids proposed if other than a standard series inventory. Describe any indexing needed. Recommend whether indexing should be done now or later (if labor intensive). Describe any agency-created indexes or finding aids.

New Finding Aids: None

Index:

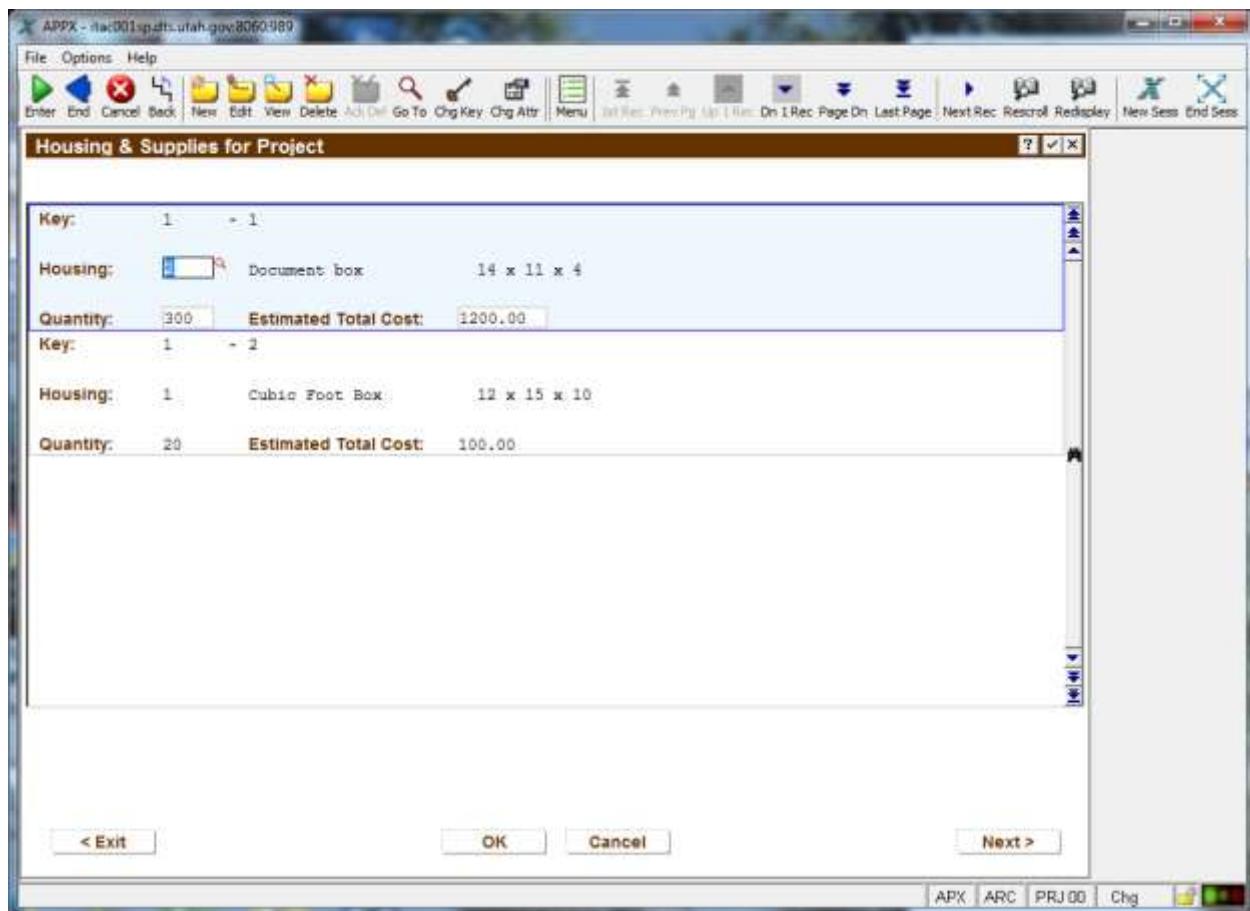
< Exit Previous Page OK Cancel Housing & Supplies Next Record >

APX ARC PRJ 00 Chg



To save the record at this point, click OK, and you will advance to the next record.

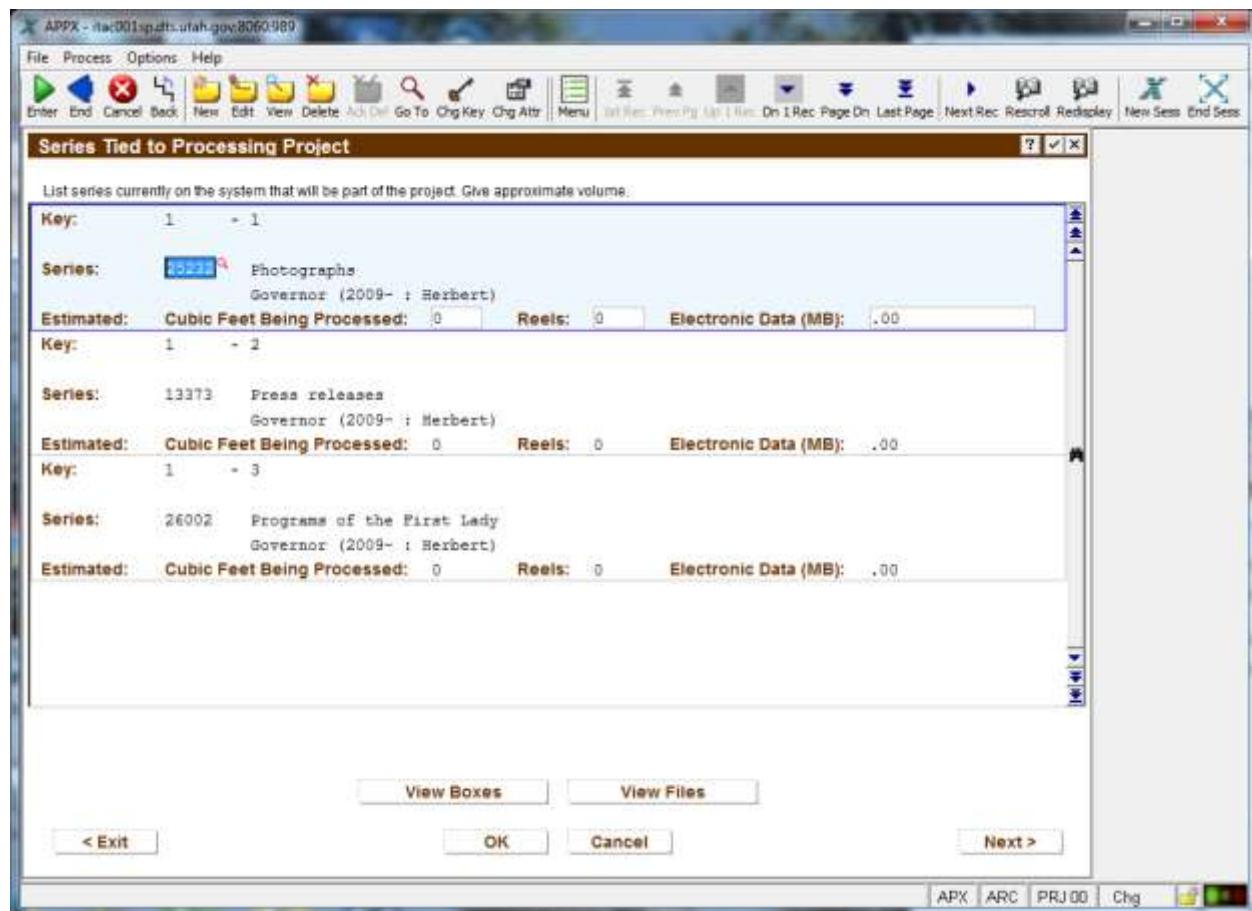
To add further metadata, click the Housing & Supplies button:



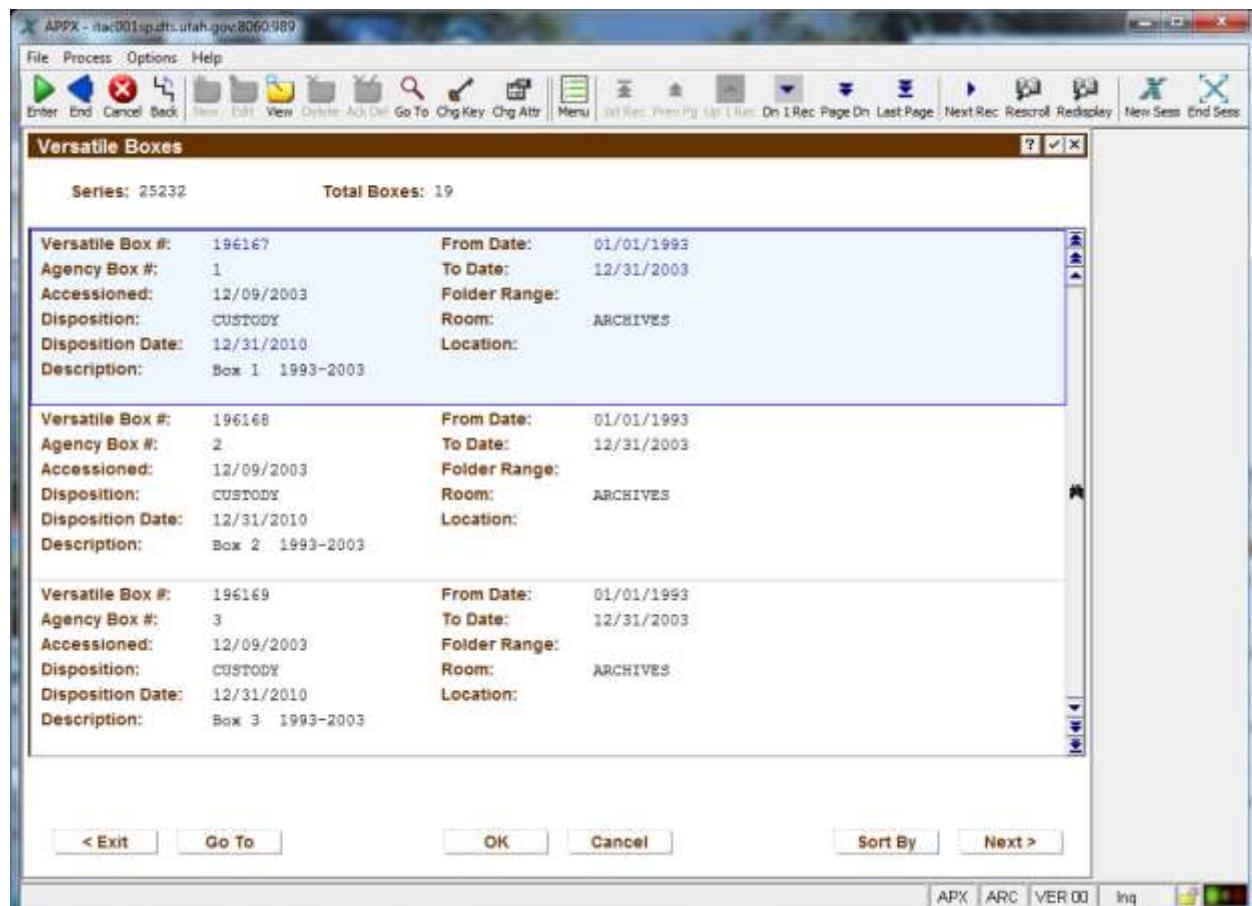
Here you can document what supplies are needed for the proposed project, including type of supply, the quantity required, and the estimated cost based upon a vendor's current pricing. Click OK to save your record or Cancel to return to the Processing Plans screen.

Click the Previous Page button, which will take you back to the first page of this record. Clicking the stairstep Back button the toolbar will do the same thing.

Click on Existing Series:



If a processing project includes known series, identify them here, plus the number of containers anticipated to be working with. If you are not sure about the physical holdings involved, click View Boxes.



You can see the total number of items at the top of the screen, and you can scroll through them by clicking the Next button or by pressing the Page Down key on your keyboard. Click Cancel to return to the previous screen.

Click the View Files button:

APPX - itac001spct.utah.gov:8060:980

File BarCode Series Box RCL # File Room Media Description

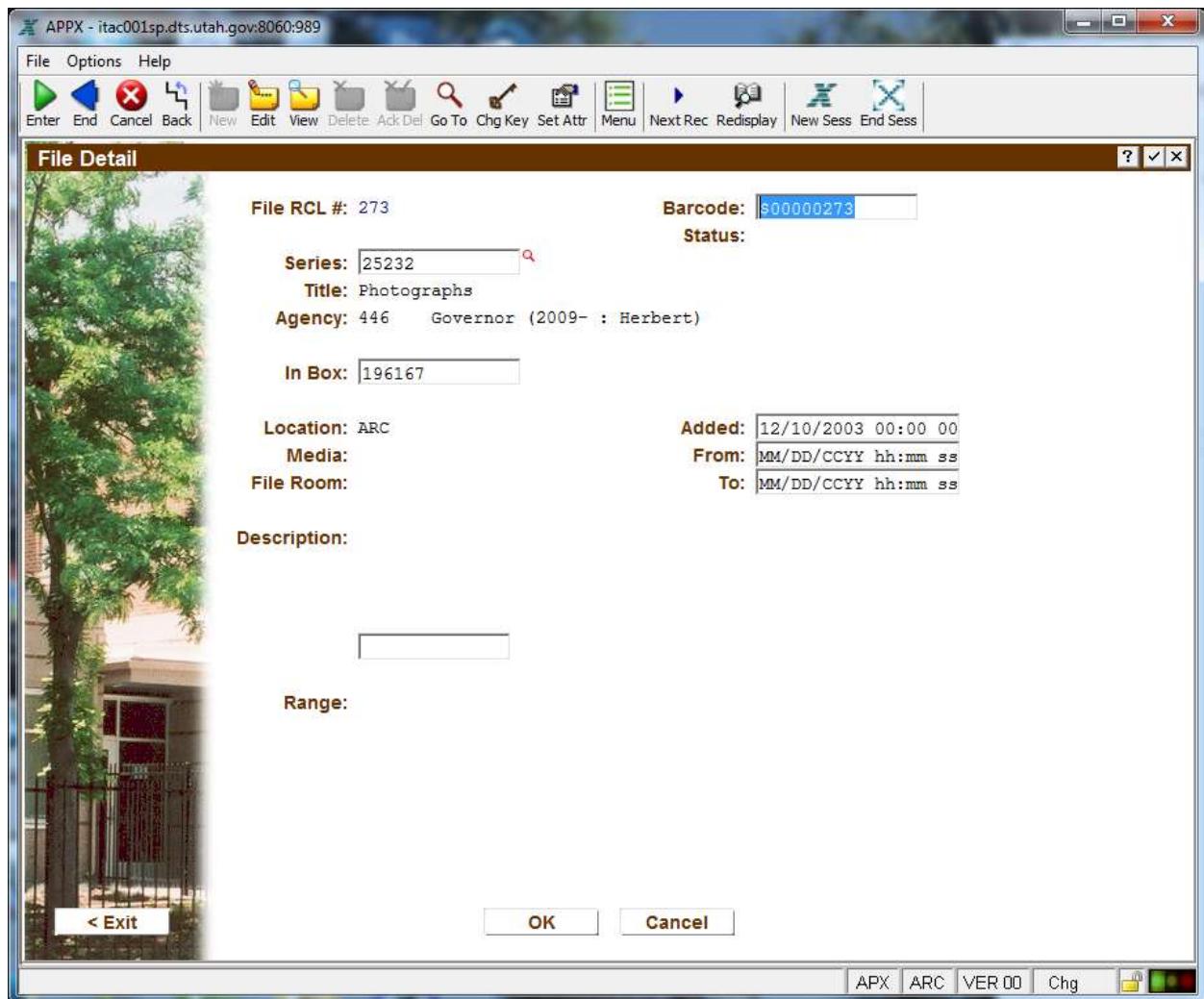
274	25232	196167			
275	25232	196167			
276	25232	196167			
277	25232	196167			
278	25232	196167			
279	25232	196167			
280	25232	196167			
281	25232	196167			
282	25232	196167			
283	25232	196167			
284	25232	196167			
285	25232	196167			
286	25232	196167			
287	25232	196167			
288	25232	196167			
289	25232	196167			
290	25232	196167			
291	25232	196167			
292	25232	196167			
293	25232	196167			
294	25232	196167			

View Detail

< Exit Go To OK Cancel Next >

APX ARC VER 00 Chg

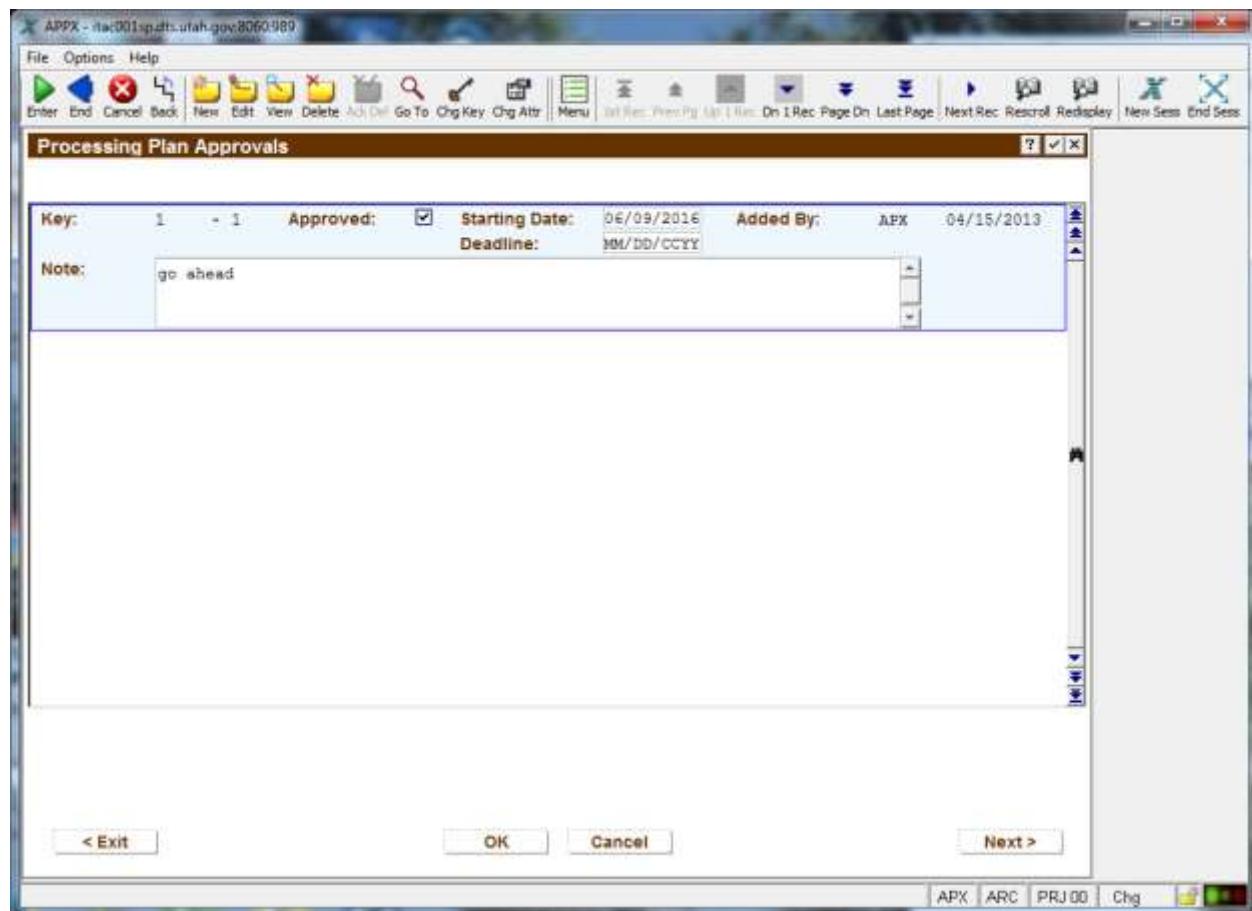
This provides a list of file records in Versatile that exist for the series. Click the View Detail button to understand more about an item:



Click Cancel until you return to the Processing Plan screen.

The Approve button is there for the Processing Supervisor to click when he or she determines that the project is a go, or to make other associated comments.

[Bug report: Approve button doesn't highlight if there is data there.]



Provide the requested metadata, then click OK to save your changes, or Cancel to return to the Processing Plan screen.

Click the Print button.

This is a PDF report. There is no query since it prints just one record.

Screenshot of a software application window showing a processing work plan. The window has a toolbar at the top with various icons. The main area contains form fields and a table of existing series. On the right, there is a sidebar with PDF export options and a list of actions.

Processing Work Plan: 1 **Added By:** APX 04/15/2013

Title: testing

Processor: Strack, Gina

Existing Series:

25232: Photographs	446: Governor Herbert	0	cf	0	rl
13373: Press releases	11: Archives and Records Service	0	cf	0	rl
26002: Programs of the First Lady	446: Governor Herbert	0	cf	0	rl

New Series: Daily journal, 2002-2004; Declarations and proclamations, 1995-2003; Governor's Olympic collection; Governor's Report on the Worker's Compensation Fund, 2003. See preliminary survey of folder arrangement by Michael Smith ca. 2005

Appraisal: Governor's records are largely historical. Some weeding may occur for exact duplicates, blank forms, and "housekeeping" documents.

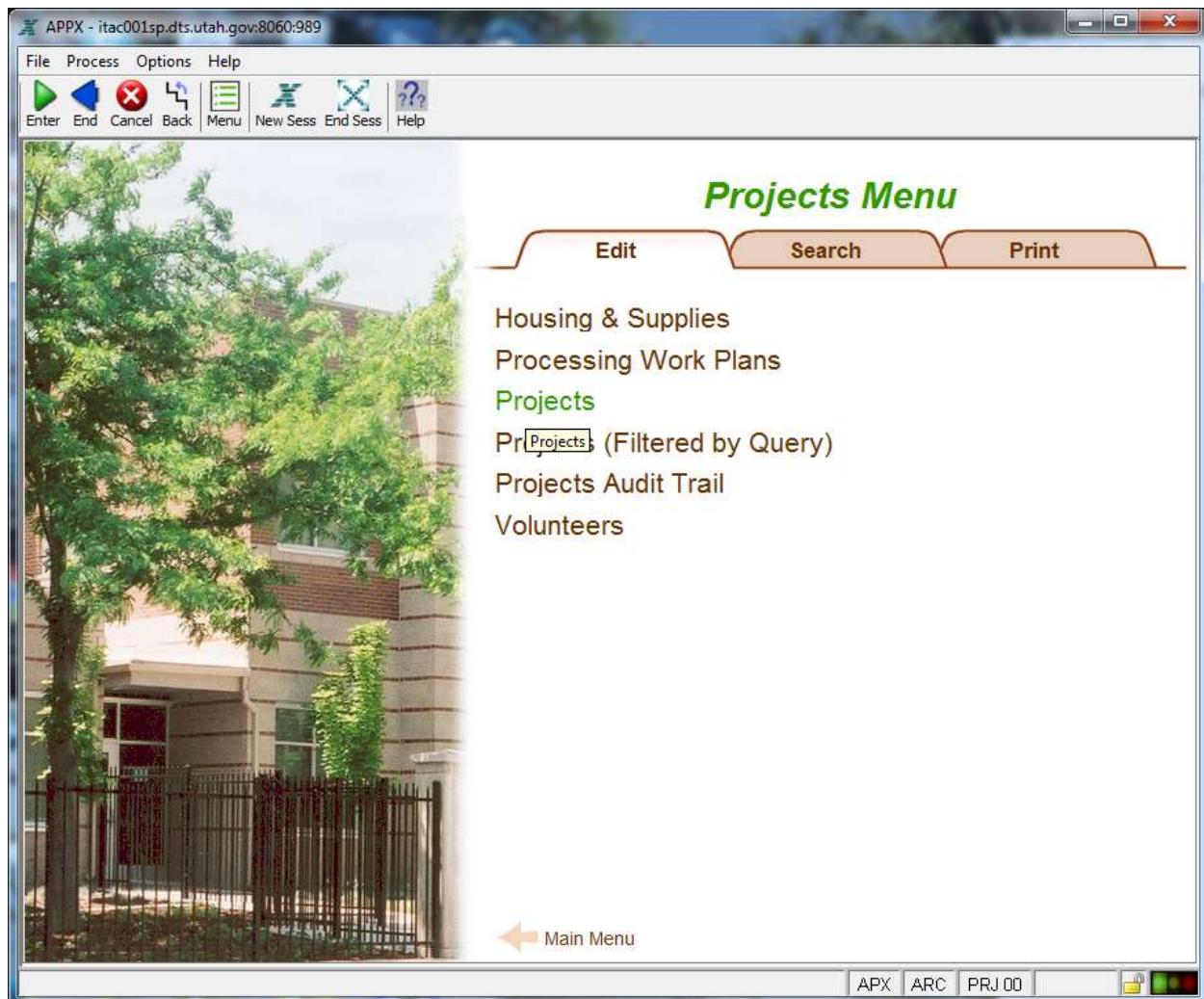
Holdings: Project is focused on electronic records copied from Governor's office (as such, no real official transfer).

Actions Sidebar:

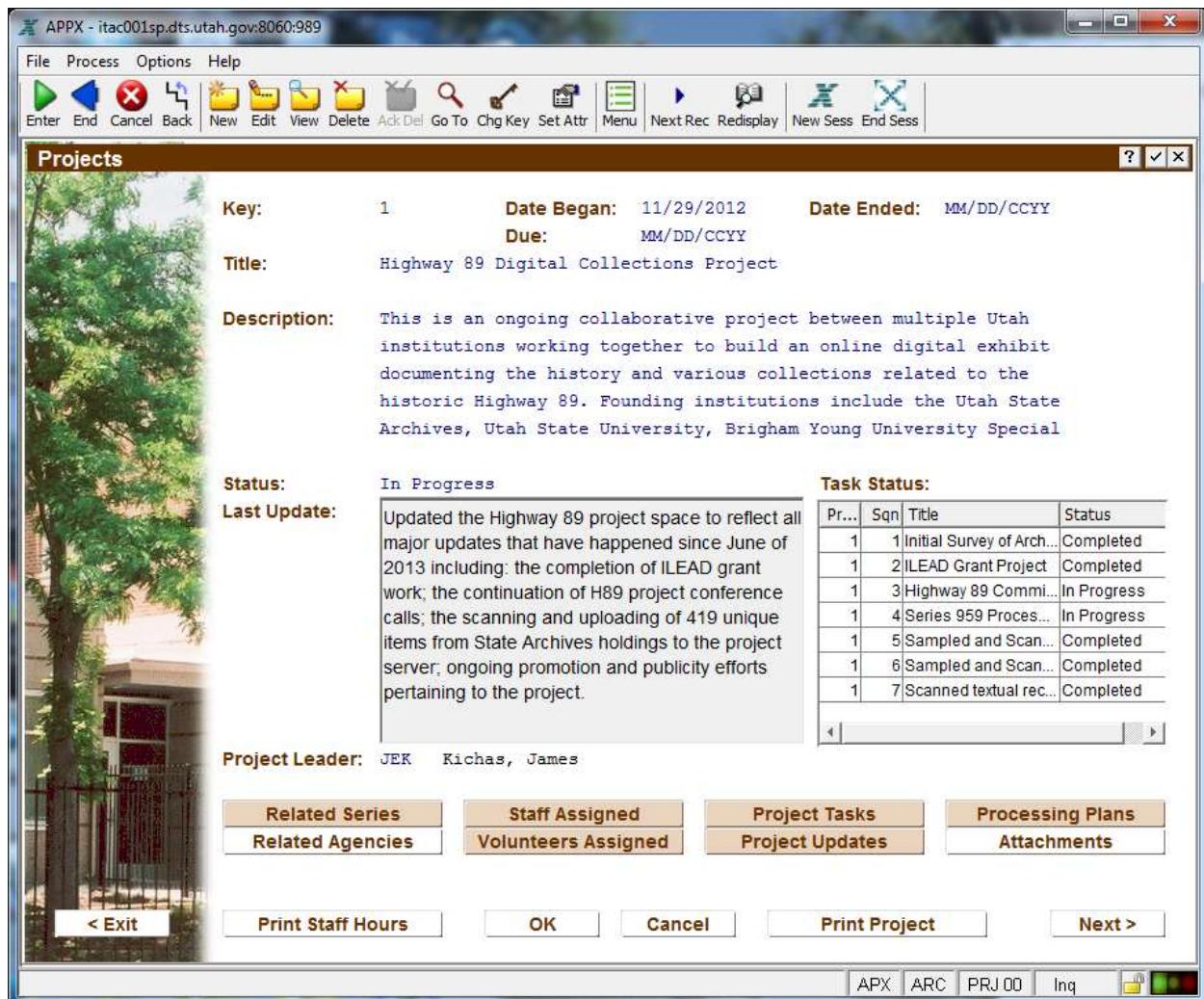
- Export PDF
- Archive Export PDF
- Selected PDF File
- Document Title
- Document ID
- Document Language
- Cancel
- Create PDF
- Edit PDF
- Comment
- Control Risks
- Fill & Sign
- Send for Signature
- Send for Review
- Show and download in the Document Cloud

Click Continue to go back Processing Plan screen, and then click Cancel to return to the Projects Menu.

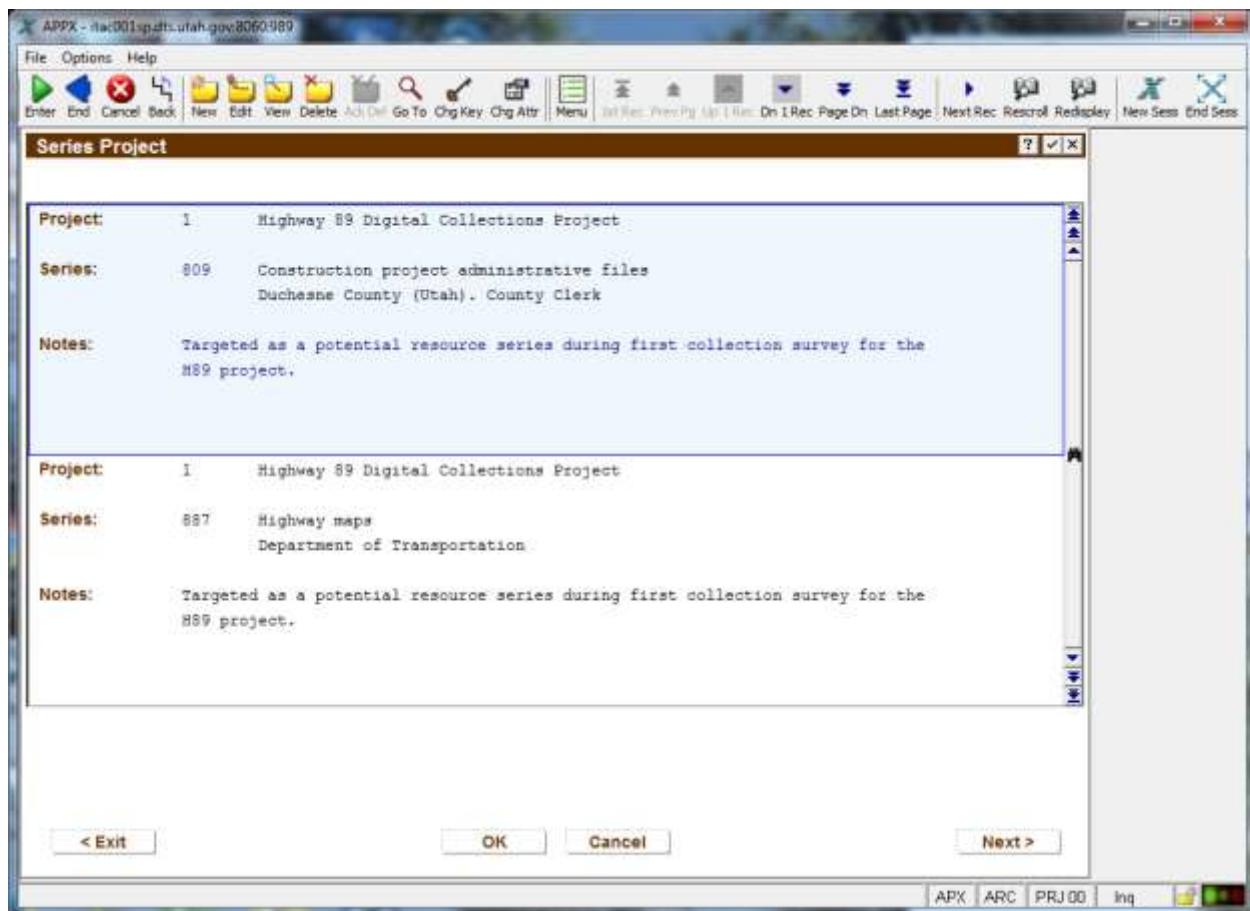
Click on the Projects option:



Provide a project key number and click OK to bring up a record:



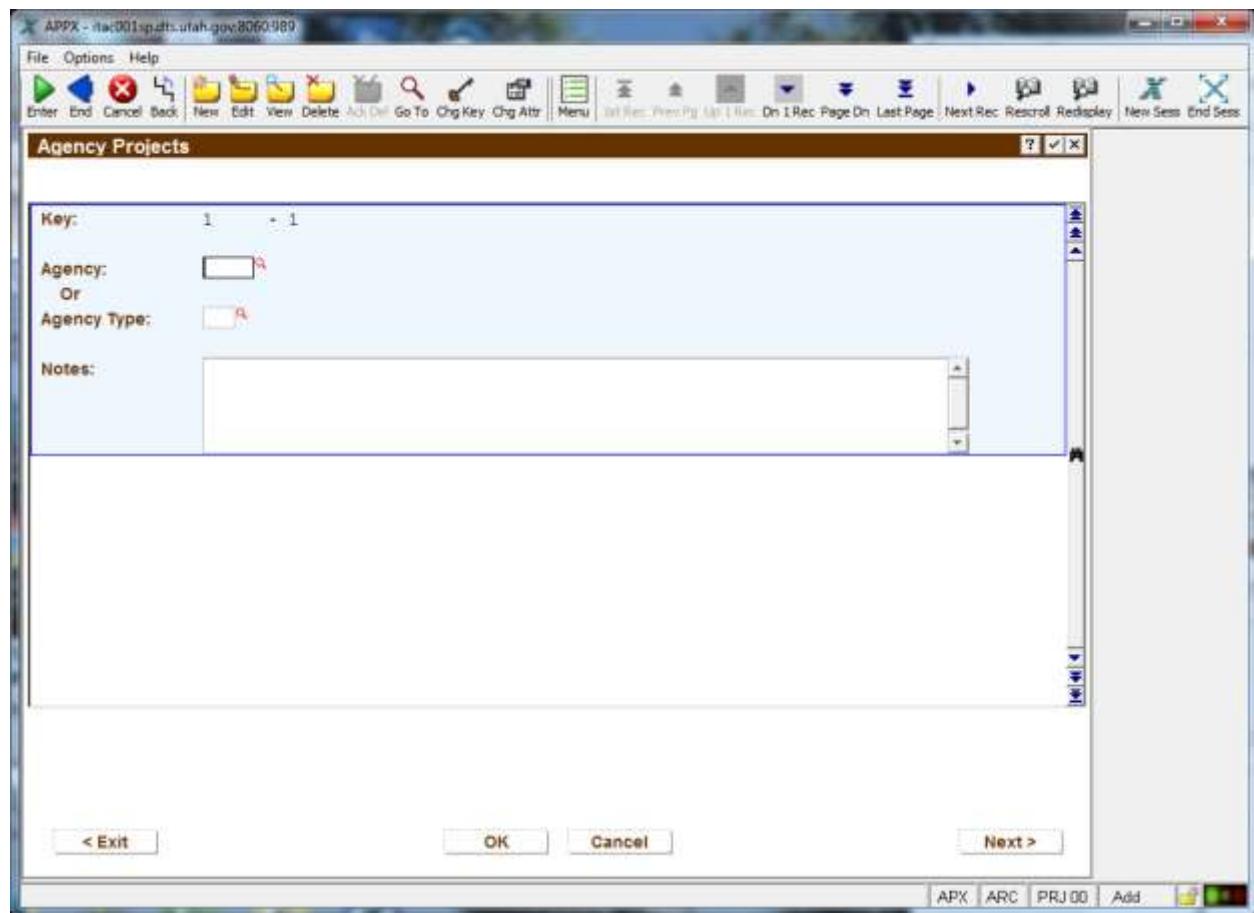
Describe the project in detail, including any due dates, plus who is the project leader. Click on the Related Series button:



For each series associated with this project, type the series number and explain in the notes field the relationship between the records and the project. Click OK to save your changes or Cancel to return to the Projects screen.

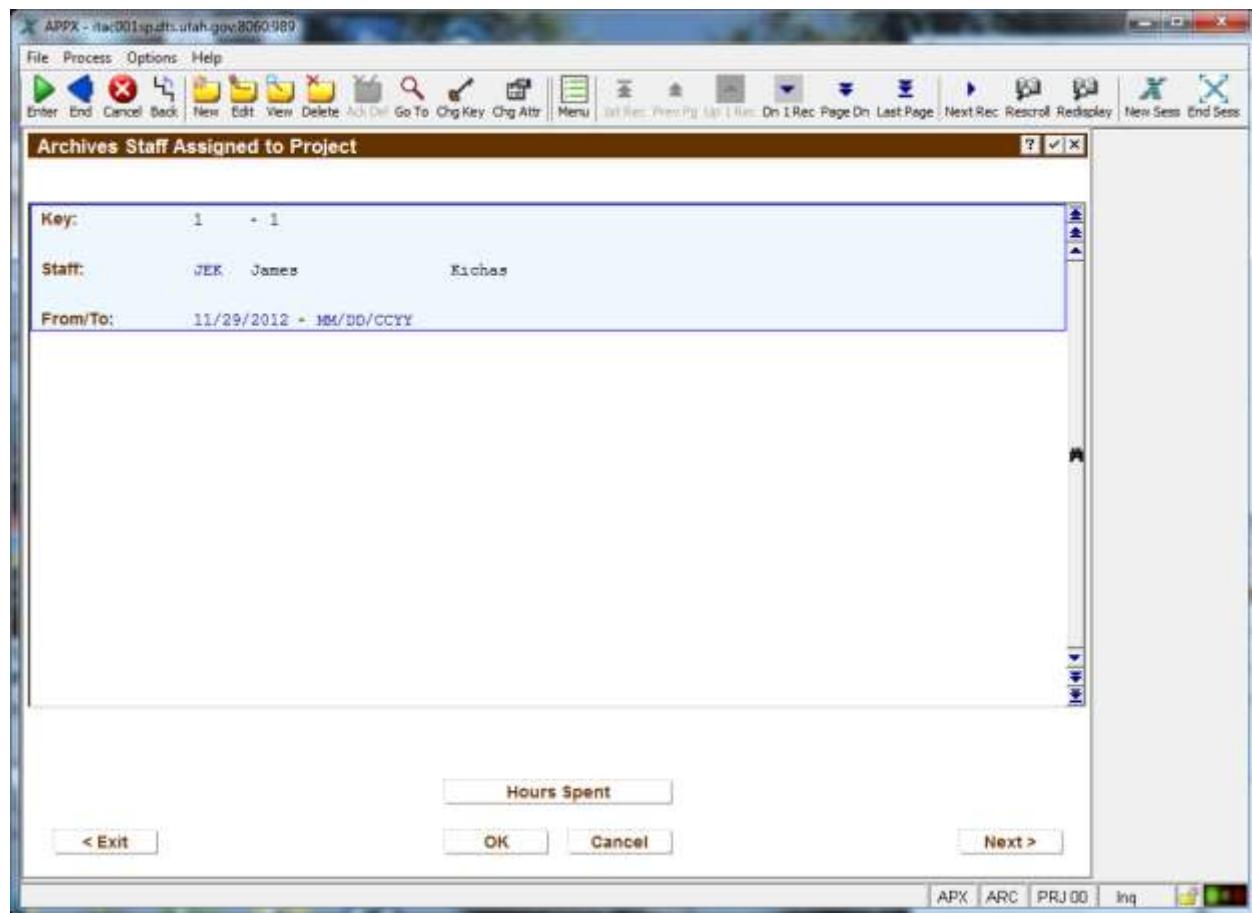
Click the Related Agencies button:

If the actual series record associated with the project is unknown or too fine a detail, then agencies that might create records associated with the project can be listed. Provide the agency key or the agency type (not both), plus any notes linking the agency to the project:

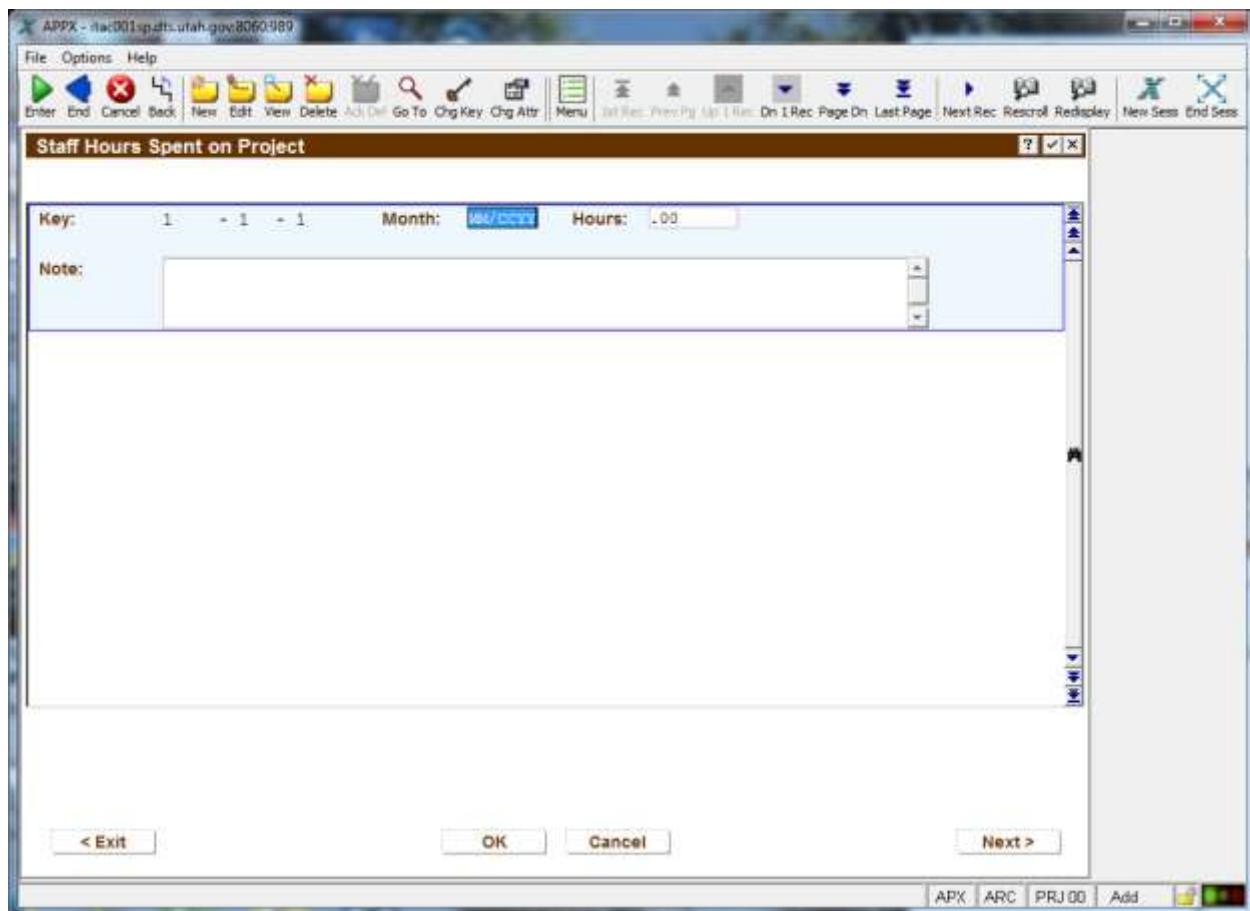


Click OK to save your changes or Cancel to return to the Projects screen.

Click the Staff Assigned button:



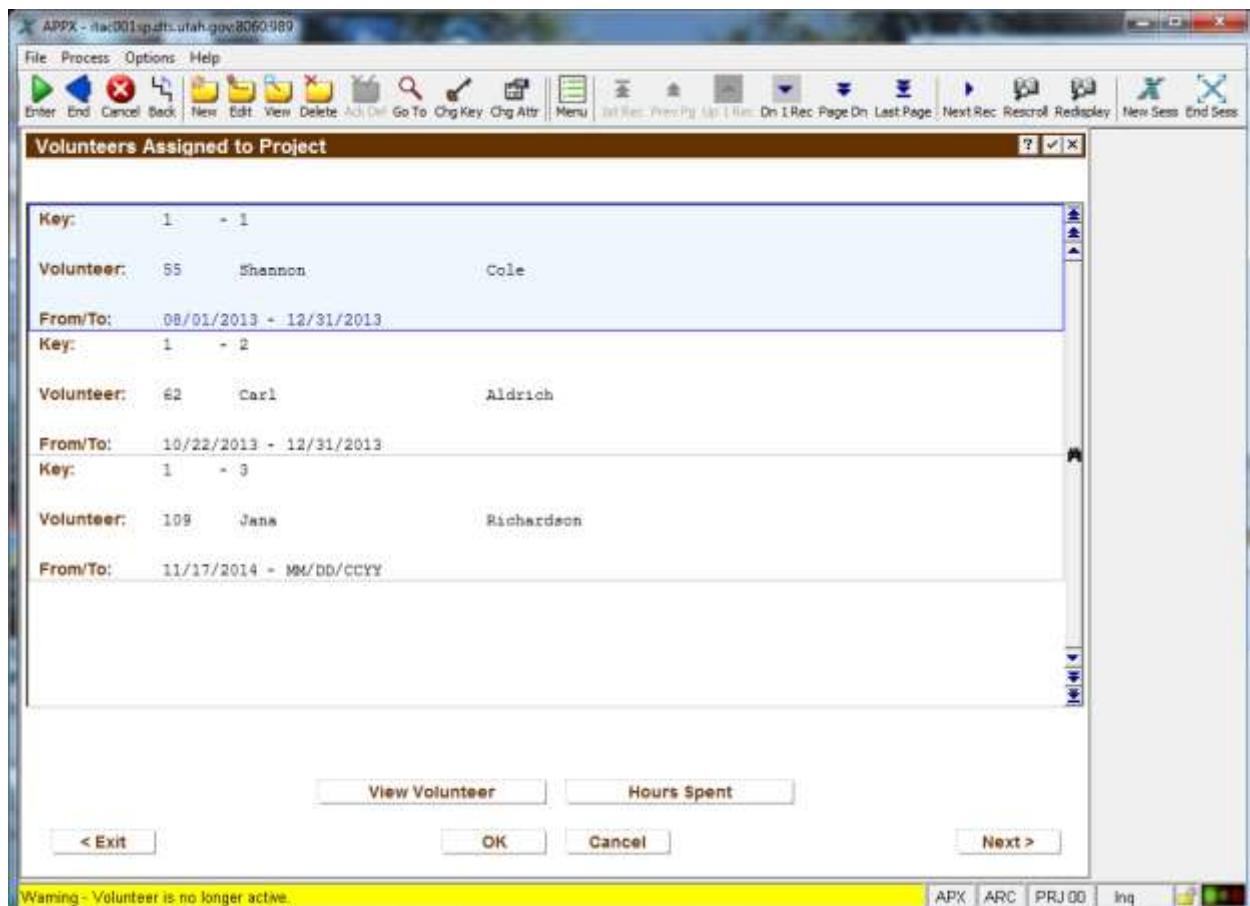
For each regular staff member who will be working on the project, provide that person's initials and date that they were assigned (or concluded their assignment). To track how many hours a person has spent on the project, click Hours Spent.



Provide the month of the hours being tracked as well as the total hours, plus any relevant notes. Tracking hours this way will alert management to the time investment being made on a particular project, if entered consistently. Click OK to save your record or Cancel to return to the previous screen.

Click Cancel to return to the Projects screen.

Click on Volunteers Assigned.



Provide the key value of the volunteer (which is a data lookup field, where you can search by name).

To view the volunteer's record, click View Volunteer:

APPX - itac001sp.dts.utah.gov:8060:989

File Process Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Volunteers

Key: 55 Dates: 08/12/2013 - MM/DD/CCYY
Current:

Last Name: Cole
First Name: Shannon
Middle Name:
Address:
City, State, Zip: Salt Lake City UT
Phone 1: 801 Phone 2: 0 Clear to Remove: /usr/local/appx/archstg1/vol
Type: Intern/class credit Birthday: / / Upload Photo
Email:

Supervisor: JEK James Kichas

Available

Monday AM: Tuesday AM: Wednesday AM: Thursday AM: Friday AM:
Monday PM: Tuesday PM: Wednesday PM: Thursday PM: Friday PM:

Interests and Qualifications

Interested in preservation. Will work Monday 10:00-2:00.

Notes

Interests

Processing/Prep: Scanning:
Records Management: Data Entry:
Research Room: Social:
Indexing: Work Alone:

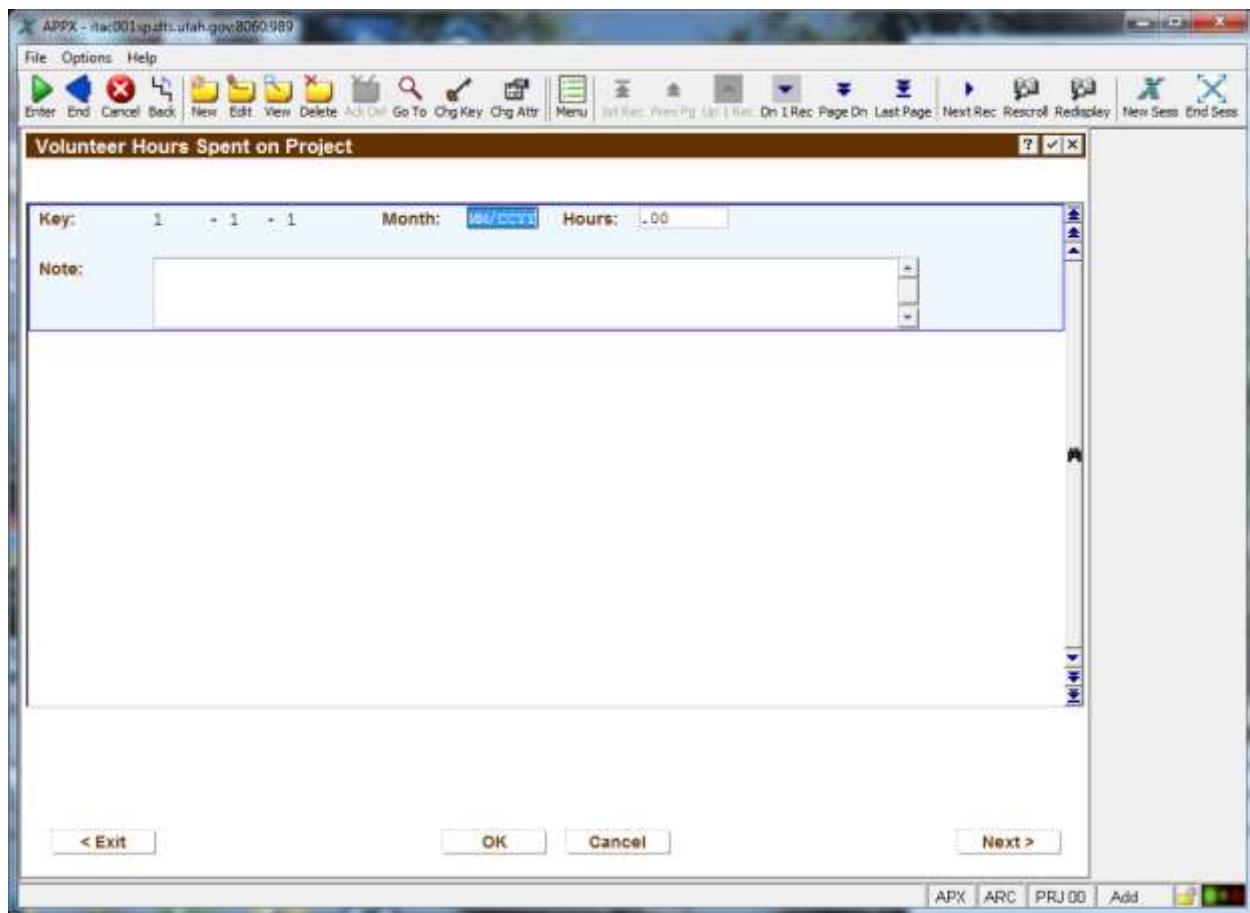
< Exit Additional Data OK Cancel Hours Worked Print Next >

APX ARC PRJ 00 Chg



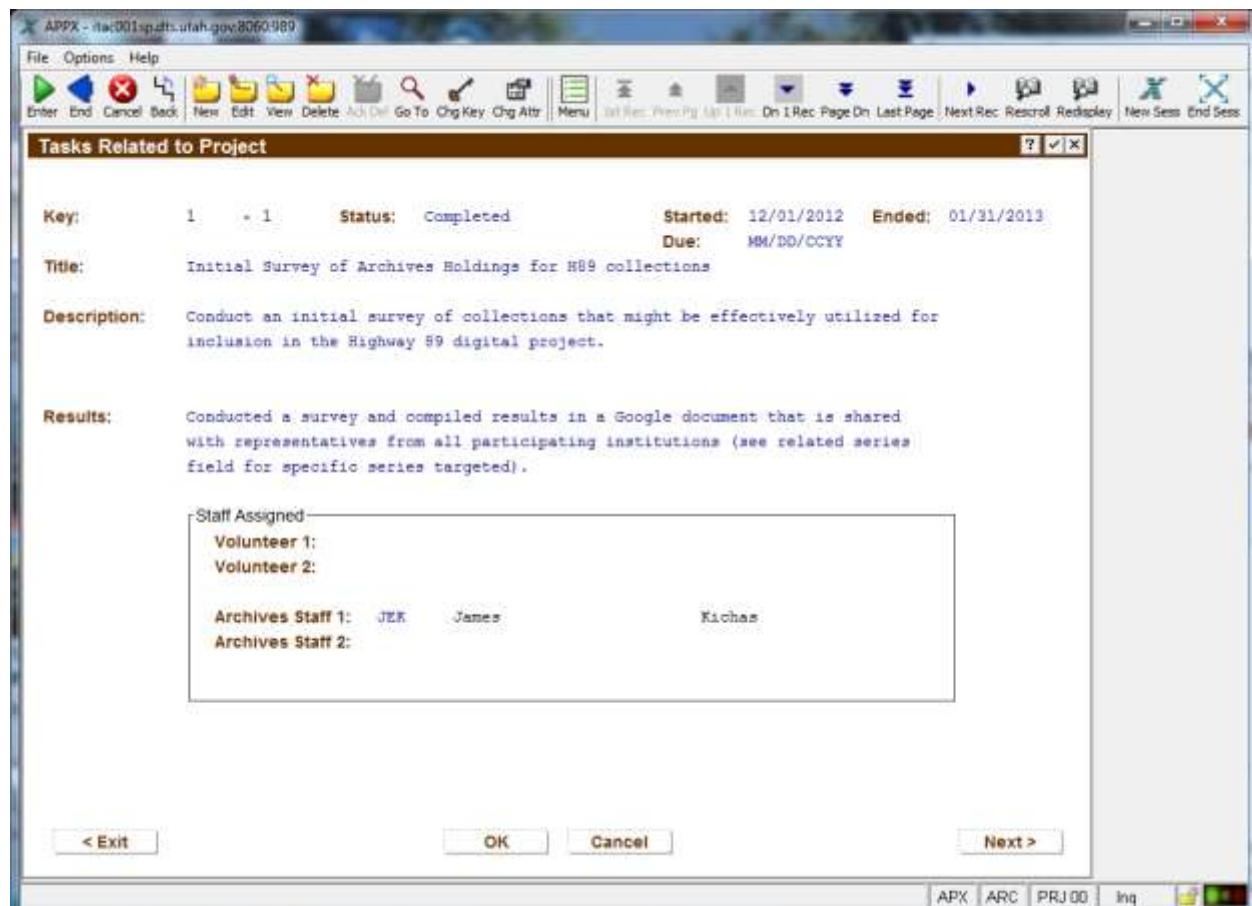
Click Cancel to return to the previous screen.

Click Hours Spent.



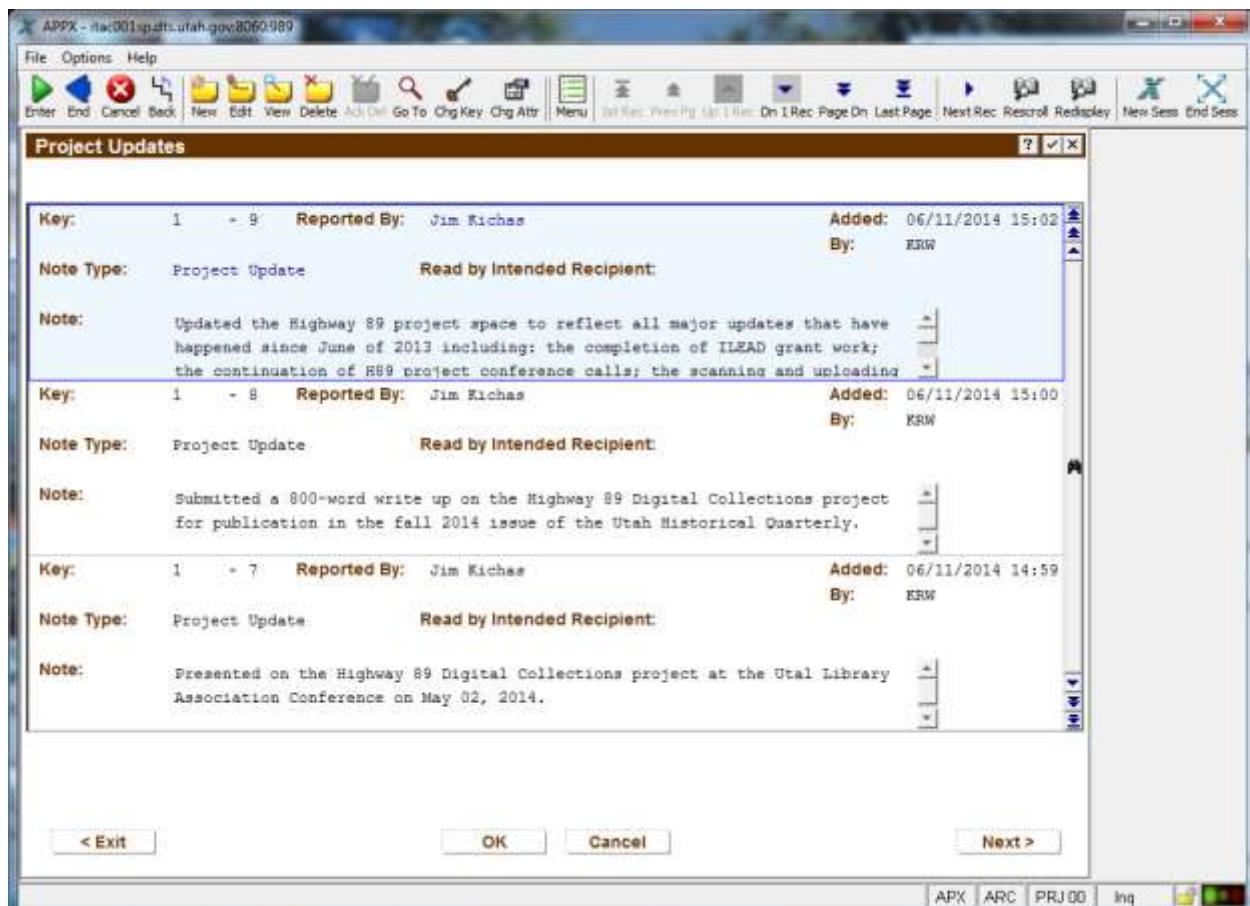
The number of hours that a volunteer spends on a particular project can be included here. Click OK to save your changes or Cancel to return to the previous screen. Click Cancel again to return to the Projects screen.

Click on Project Tasks.



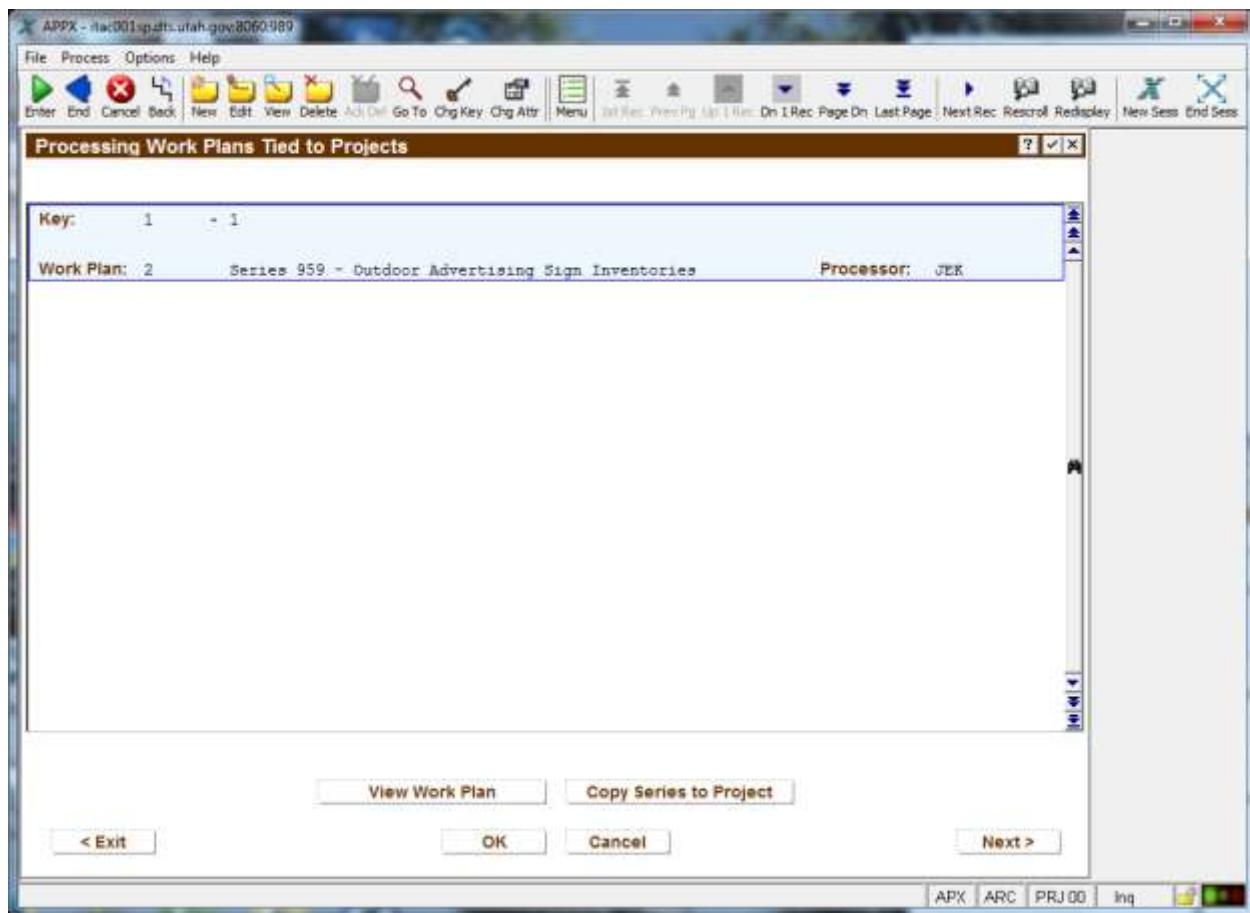
Identify each task associated with the project, and the people assigned to the particular task. Describe the results once the task is accomplished. Click OK to save your changes or Cancel to return to the Projects screen. Note that each task entered here is displayed on the main Projects screen as a table widget for quick access. While you may drill down to a task by double-clicking the row on the table widget, you can't delete a task through those means. Instead, you must access the Project Tasks button and navigate the data directly as described above.

Click on the Project Updates button.



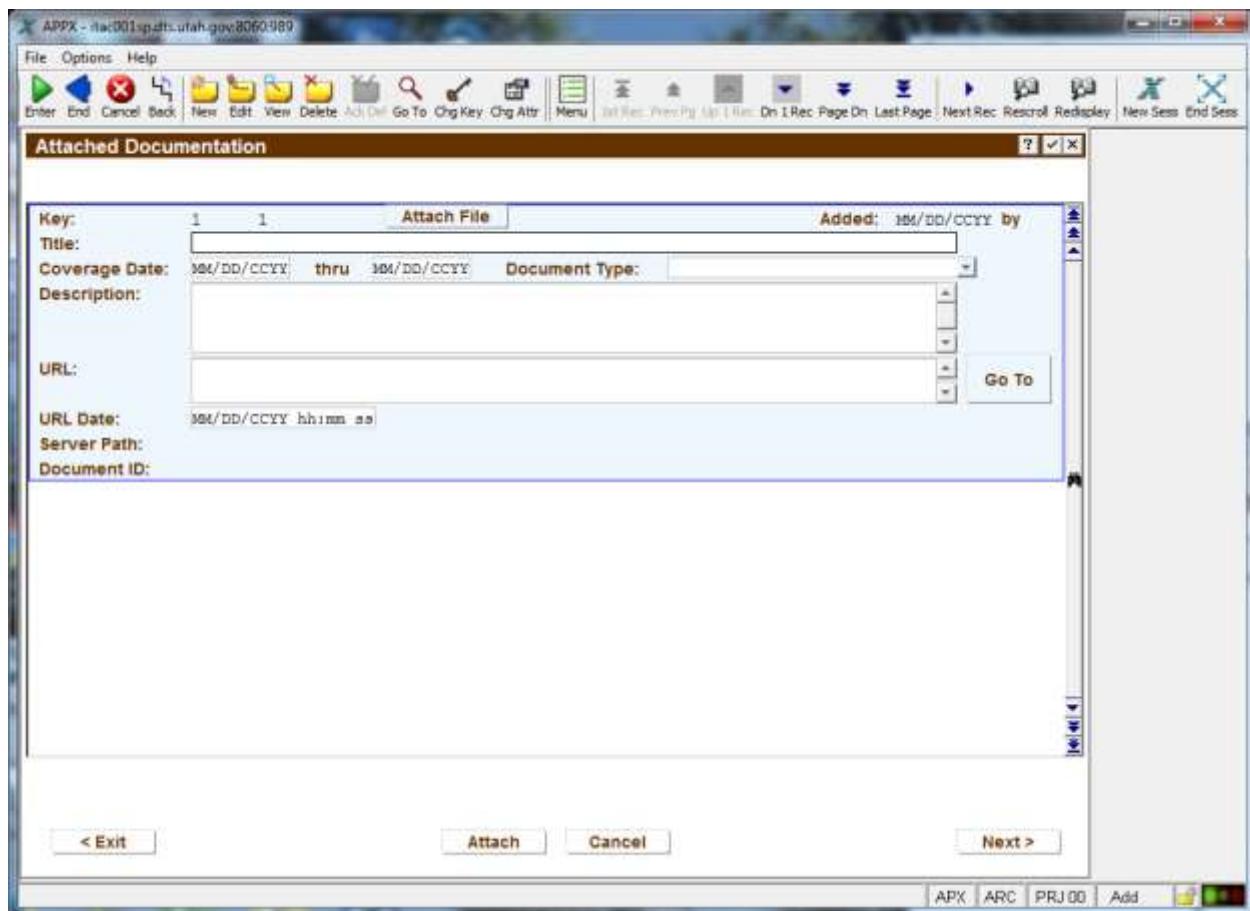
Every time something changes with regard to the project, write an Update regarding the event. The last update entered will auto-post to the main Projects screen. The Note Type field is for identifying whether the update is a Project Update or a Supervisor Response. If the update has been read by either the staff member assigned, or the project leader/supervisor, then the Read by Intended Recipient checkbox is checked to keep track of communication. Click OK to save your changes or Cancel to return to the Projects screen.

Click on Processing Plans.

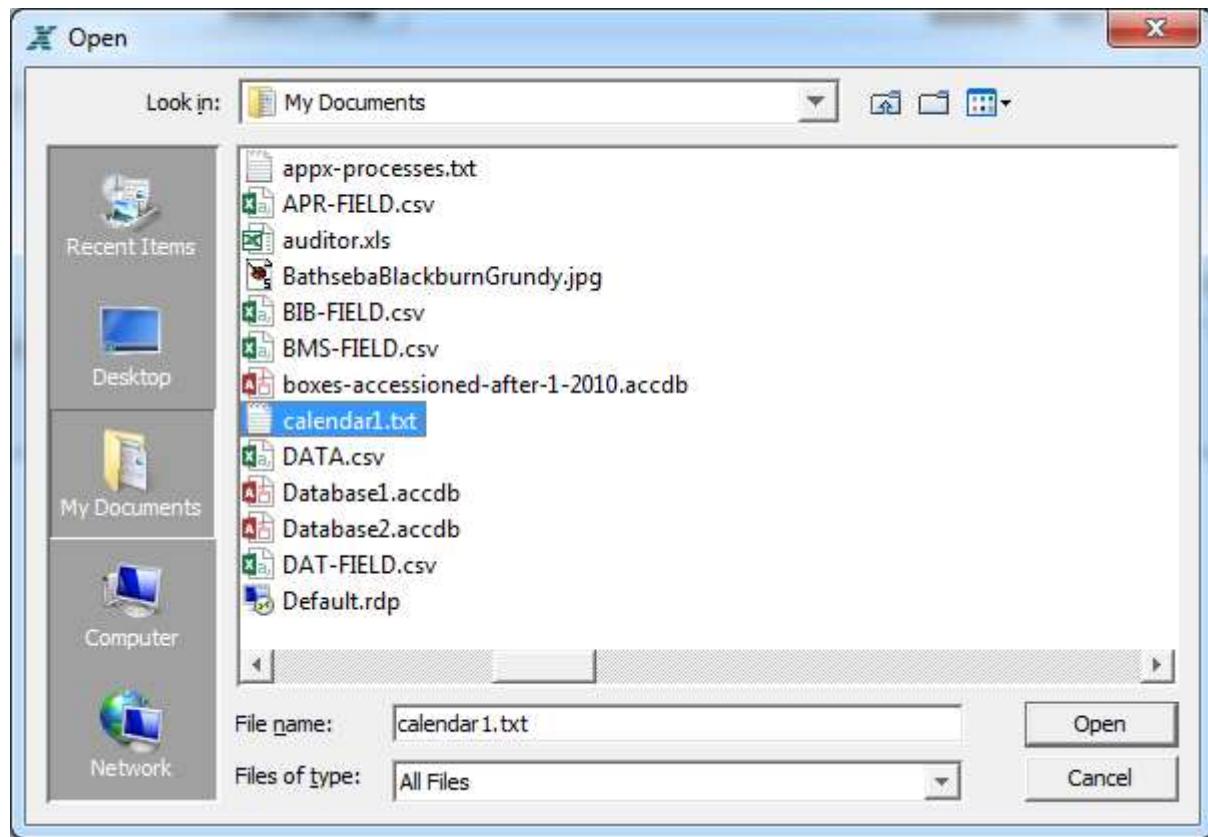


Identify the processing plan which is associated with this project. If a processing plan already has series associated with it, clicking on the Copy Series to Project button will auto-populate the Related Series data associated with the project, so it doesn't have to be entered twice. Clicking the View Work Plan will allow you to see the Processing Plan you just linked to the project. Click OK to save your changes or Cancel to return to the Projects screen.

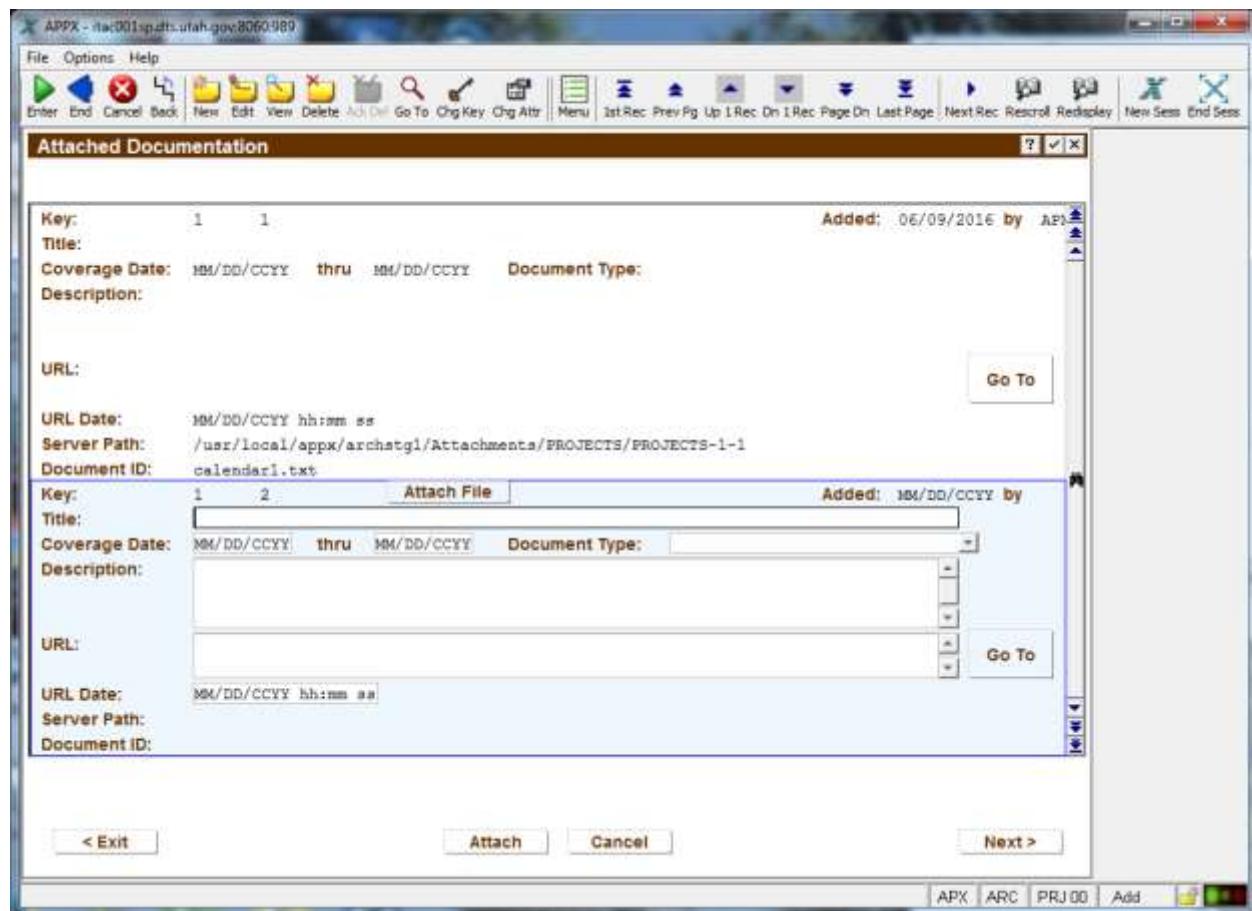
Click Attachments.



To add an attachment, click the New button in the toolbar, and then provide the metadata requested for describing the attached file. If the file is online and doesn't require attaching, provide that information. To view the URL in a browser, click the Go To button after the record has been saved. To attach a file, click Attach File.



Select a file and click Open.



The file will automatically upload to the server. If you delete the attachment record, the file will also be deleted from the server. Click cancel to return to the Projects screen.

Click Print Staff Hours.

This is a PDF report. There is no query, and it just prints the one record. If hours have been entered, they will be added up and totaled.

The screenshot shows a web-based application interface for managing projects. On the left, there's a main content area displaying project information. On the right, there's a sidebar with various tools and options.

Project Details:

- Project Num:** 1
- Date Begun:** 11/29/2012
- Date Ended:**
- Title:** Highway 89 Digital Collections Project
- Description:** This is an ongoing collaborative project between multiple Utah institutions working together to build an online digital exhibit documenting the history and various collections related to the historic Highway 89. Founding institutions include the Utah State Archives, Utah State University, Brigham Young University Special Collections, Southern Utah University, Salt Lake County Archives, and Northern Arizona University.

Hours Worked:
JEK Kichas, James

-- Staff hours on project Totals -->
.00

-- Staff assigned to project Totals -->
.00

-- Grand Totals -->
.00

Actions:

- Export PDF
- Online Export PDF
- Save PDF File
- Document ID
- Document Language
- Cancel
- Create PDF
- Edit PDF
- Comment
- Control Risks
- Fill & Sign
- Send for Signature
- Send & Track
- Show and share this in the Document Cloud

Click Continue to return to the Projects screen.

Click Print Project.

This is a PDF report. There is no query since it just prints the one record.

The screenshot shows a detailed view of a project record, likely a printout or a PDF report.

Project 1

Project Title: Highway 89 Digital Collections Project

Description: This is an ongoing collaborative project between multiple Utah institutions working together to build an online digital exhibit documenting the history and various collections related to the historic Highway 89. Founding institutions include the Utah State Archives, Utah State University, Brigham Young University Special Collections, Southern Utah University, Salt Lake County Archives, and Northern Arizona University.

Dates: 11/29/2012 -

Supervisor: Kichas, James

Related Series:

809	Construction project administrative	1512	Duchesne Co. Clerk
	Notes: Targeted as a potential resource series during first collection survey for the H89 project.		
887	Highway maps	1177	Transportation Department
	Notes: Targeted as a potential resource series during first collection survey for the H89 project.		
921	Photographs	831	Road Commission
	Notes: Targeted as a potential resource series during first collection survey for the H89 project.		
922	Publications	831	Road Commission
	Notes: Targeted as a potential resource series during first collection survey for the H89 project.		
959	Outdoor advertising sign inventory	520	Highway Department

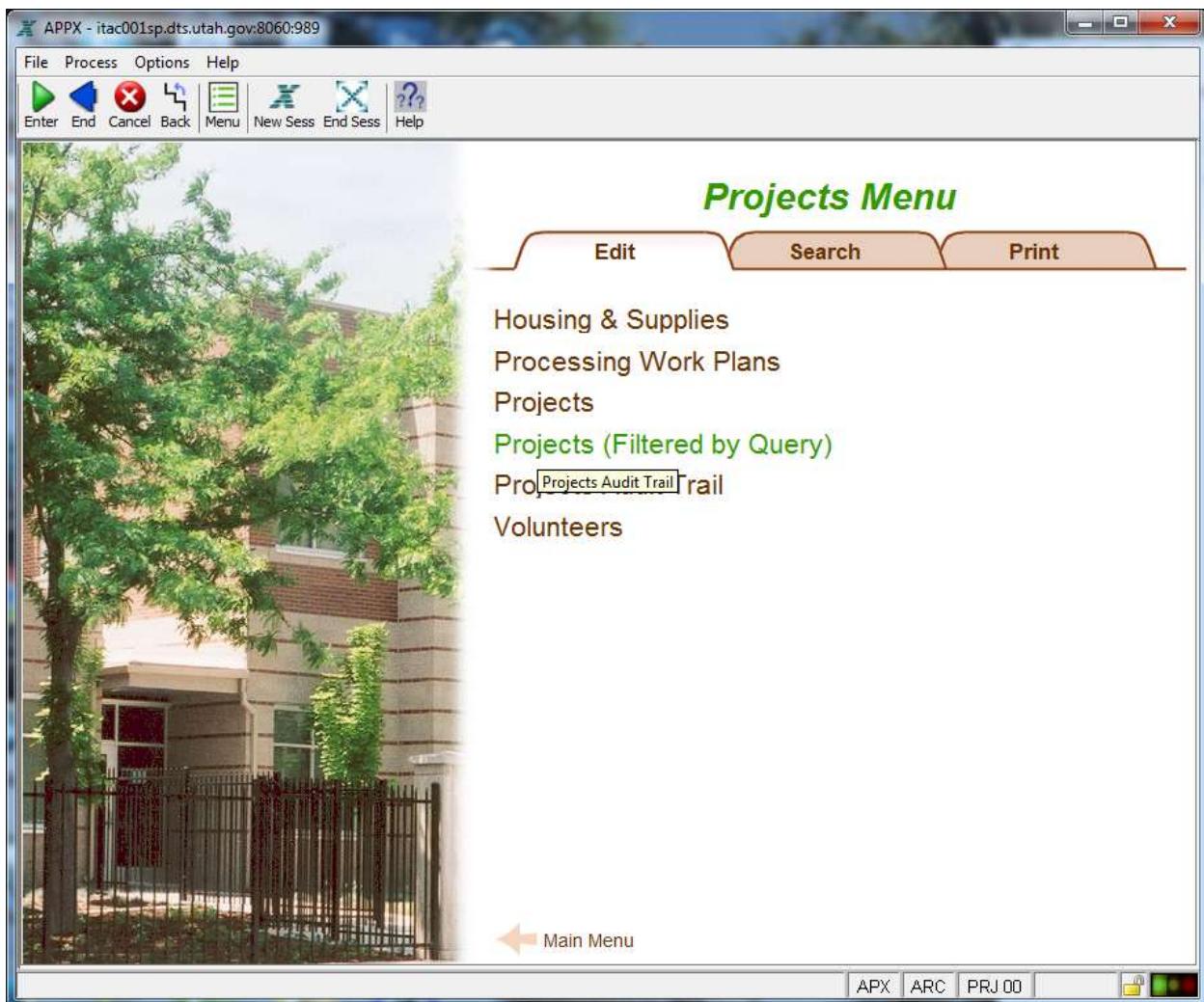
Actions:

- Export PDF
- Online Export PDF
- Save PDF File
- Document ID
- Document Language
- Cancel
- Create PDF
- Edit PDF
- Comment
- Control Risks
- Fill & Sign
- Send for Signature
- Send & Track
- Show and share this in the Document Cloud

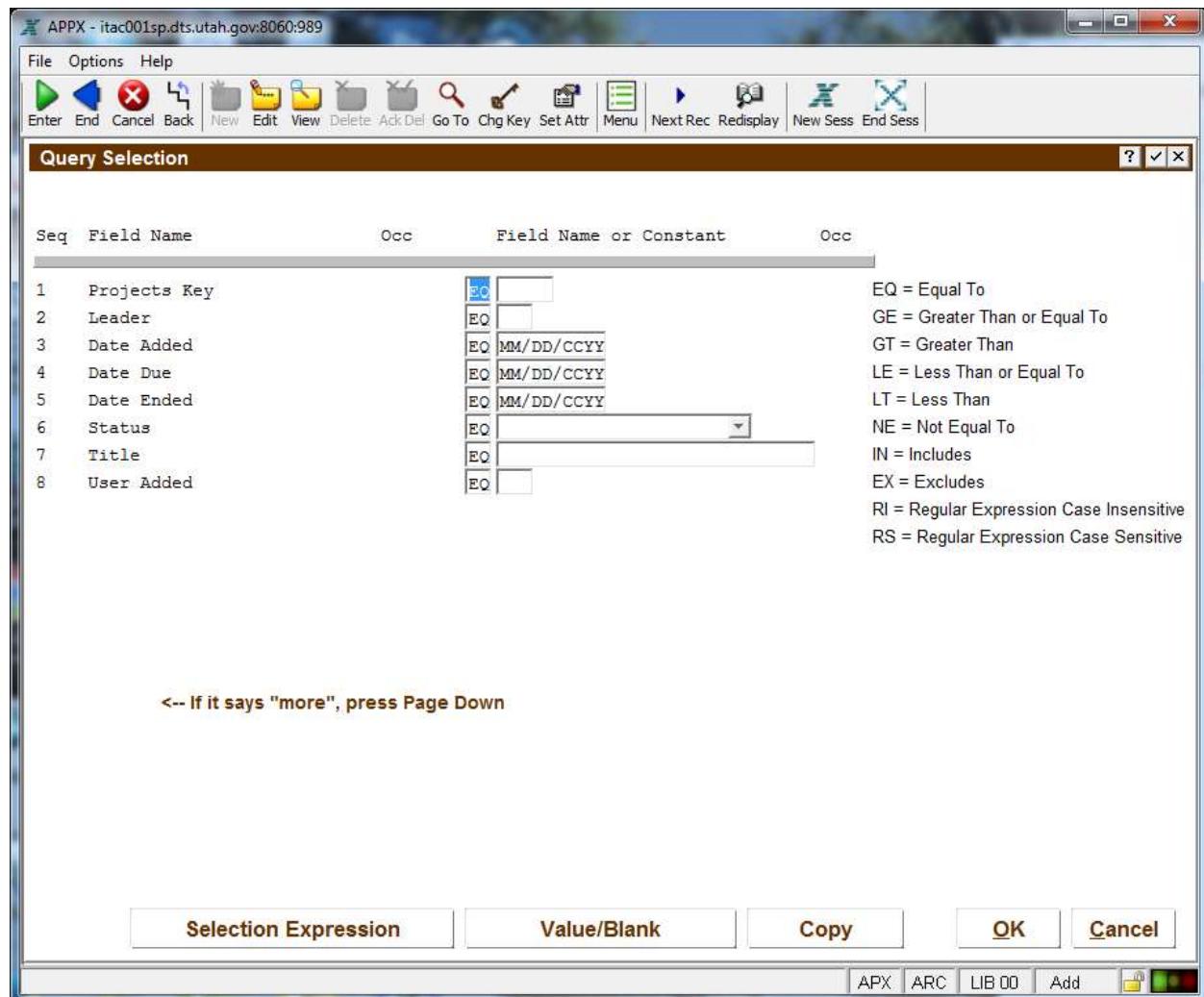
All aspects of the project are included here, such as related series, tasks, and updates.

Click Continue to return to the Projects screen. Click Cancel to return to the Projects Menu.

Click the Projects (Filtered by Query) option:



This brings up a query screen asking for a variety of details, including the project's key; who the project leader is; dates added, due or ended; status of the project, the title, and who added the project.



This brings up a table widget listing each project that matches the query:

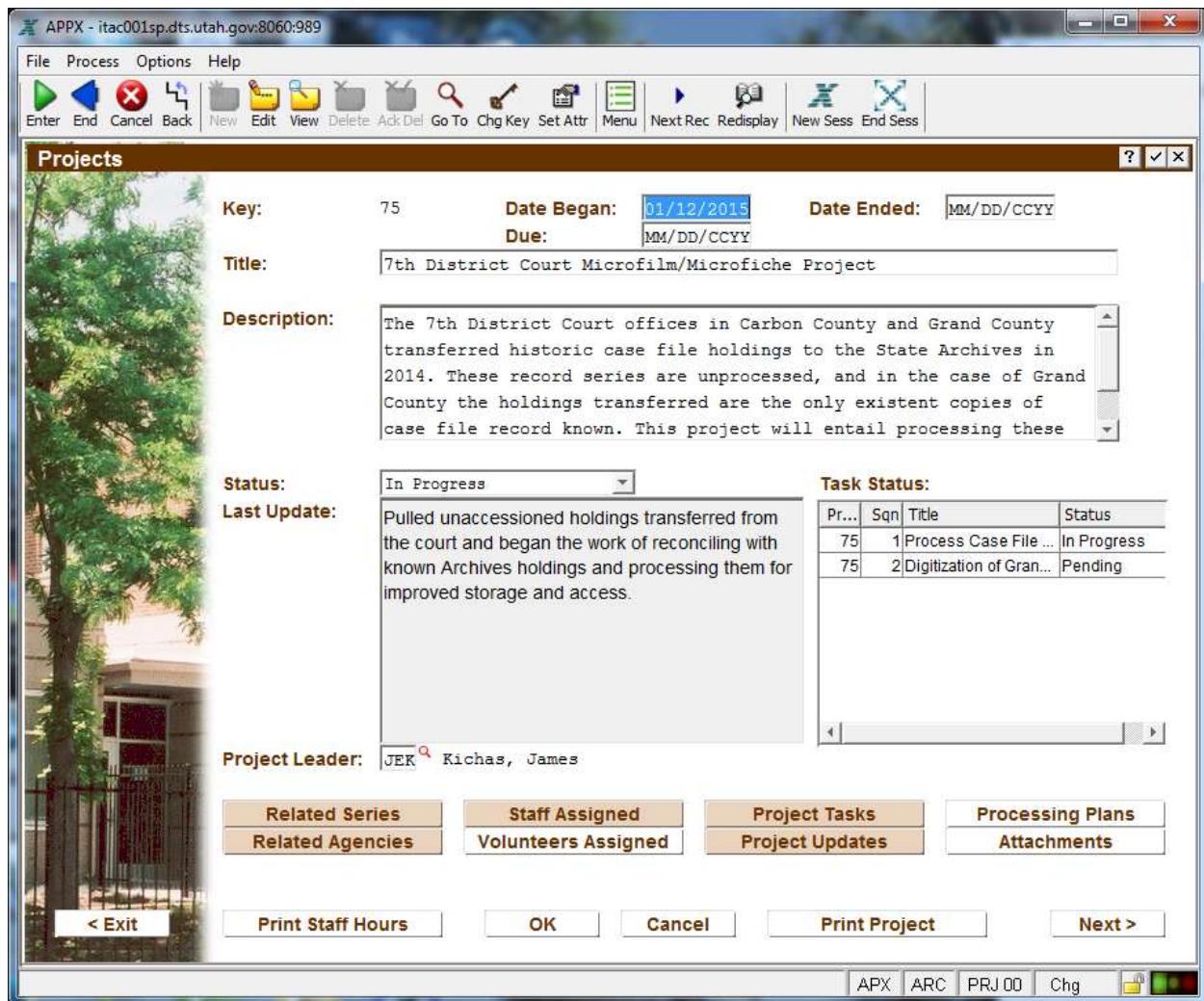
APPX - itac001sp.dts.utah.gov:8060:989

Projects Filtered by Query

Proj ...	Pr...	Date Added	Status	Title
1	JEK	2013-04-09	In Progress	Highway 89 Digital Collections Project
6	JEK	2013-06-03	Pending	Environmental Publications Sorting Project
34	JEK	2013-12-02	In Progress	Archives Month 2016
52	JEK	2014-06-11	Completed	State Engineer/Division of Water Rights Processing Project
53	JEK	2014-06-18	Completed	Archives Month 2014
54	JEK	2014-06-19	Stalled	Supreme Court Research Guide and Processing Priorities Project
64	JEK	2014-11-20	In Progress	Electronic Archives Initiative: Acquisition and Ingest
71	JEK	2014-12-18	In Progress	Ogden Police Department Mugshots Project
72	JEK	2014-12-18	Completed	Salt Lake City Fire Department Photographs
74	JEK	2015-01-06	In Progress	2nd District Court Davis County Microfilm Project
75	JEK	2015-01-13	In Progress	7th District Court Microfilm/Microfiche Project
77	JEK	2015-03-30	In Progress	AGRC Digital Orthophoto Quadrangles Imagery Records
86	JEK	2015-08-18	Completed	Archives Month 2015
88	JEK	2015-09-16	Completed	Joe Hill Digitization and Online Exhibit Project
96	JEK	2016-04-06	In Progress	John D. Lee Case File Digitization Project
97	JEK	2016-04-06	In Progress	Bingham and Copperton Photograph Digitization Project

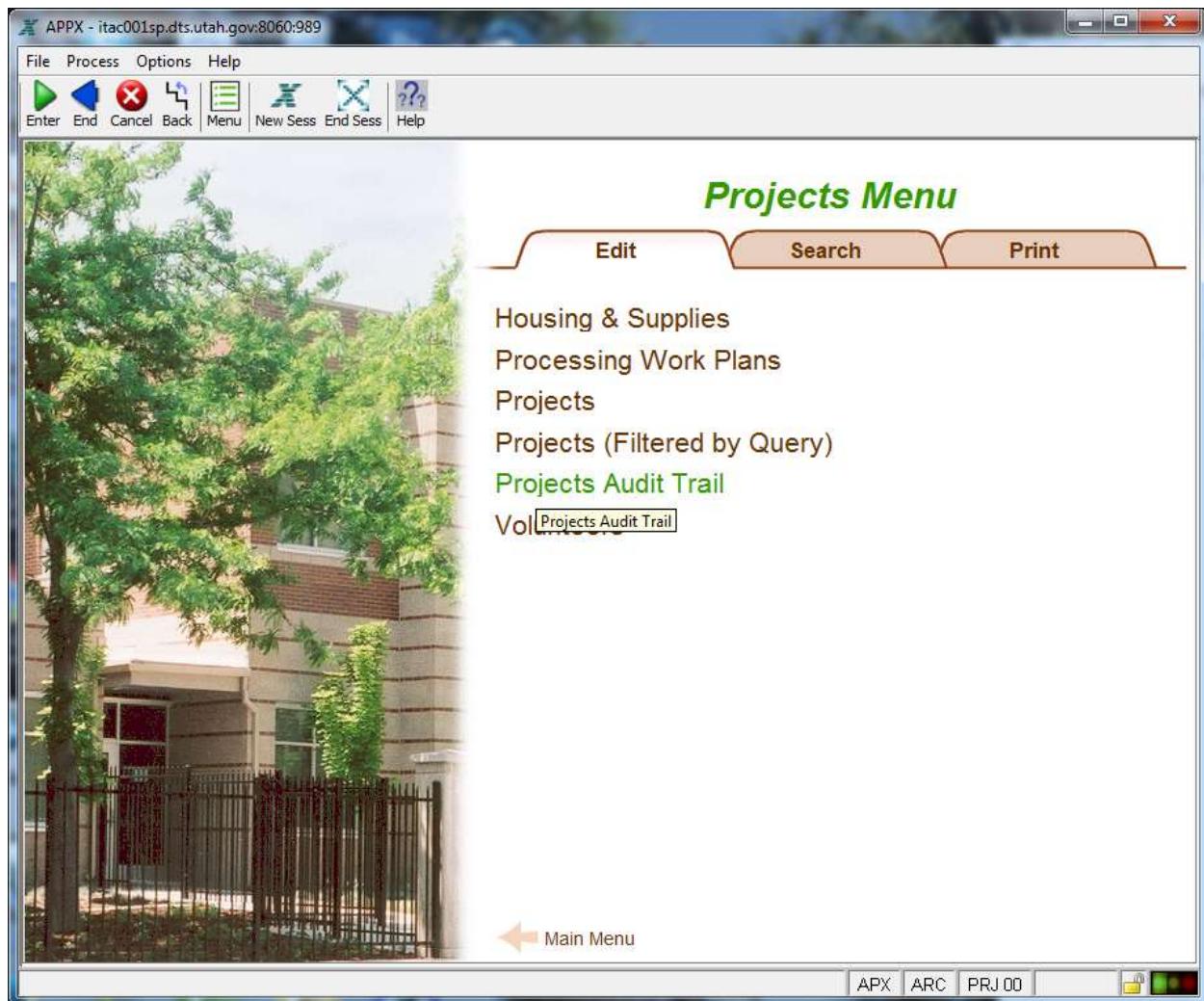
OK Cancel

To drill down to the project, double-click a row.



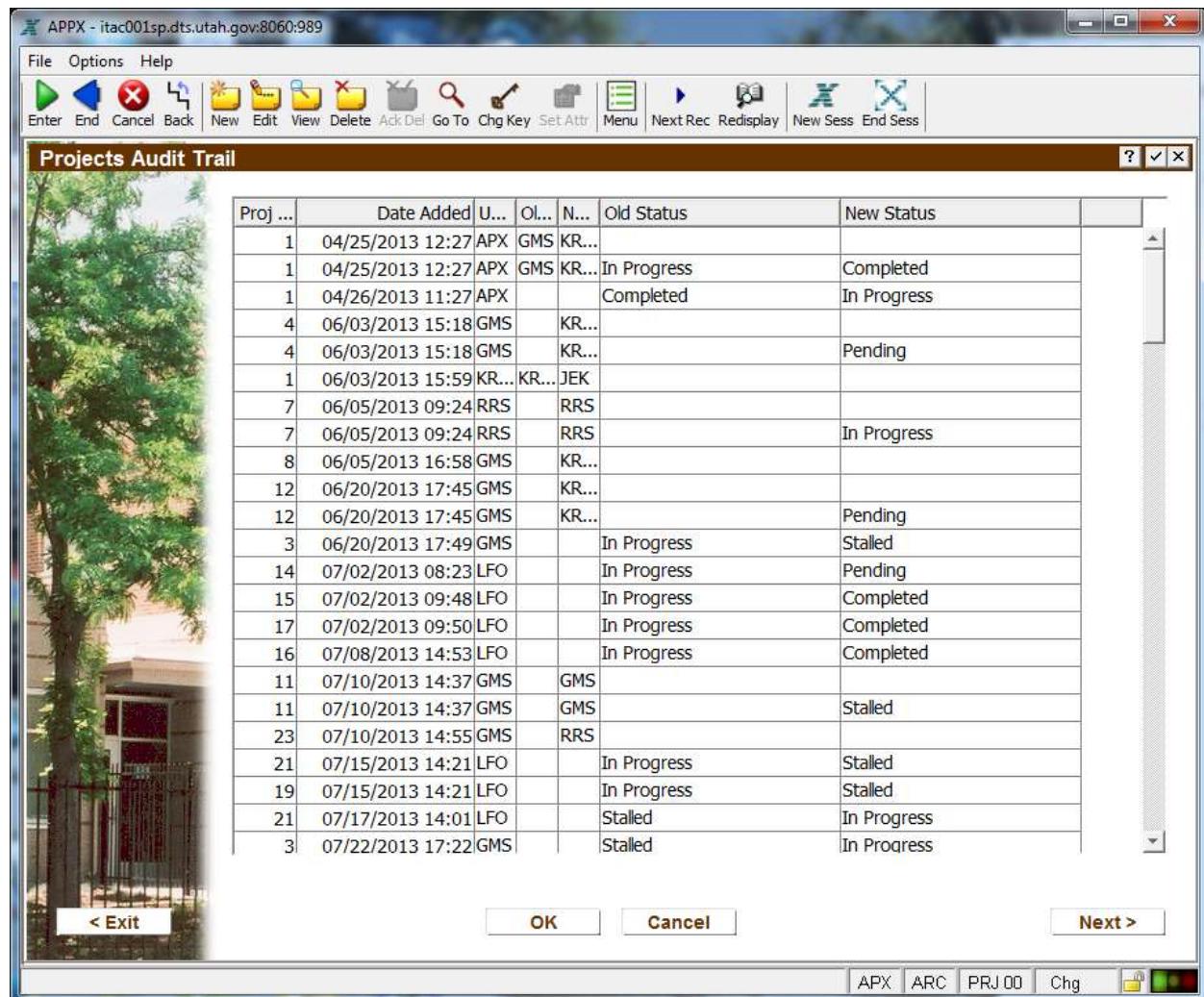
Click Cancel to return to the table widget. Click Cancel again to return to the Projects Menu.

Click Projects Audit Trail.



This brings up a table widget that lets you sort by column, such as New Status, so you can see at a glance how many projects are stalled, for instance.

APPX - itac001sp.dts.utah.gov:8060:989



The screenshot shows a Windows application window titled "APPX - itac001sp.dts.utah.gov:8060:989". The menu bar includes "File", "Options", and "Help". The toolbar contains icons for "Enter", "End", "Cancel", "Back", "New", "Edit", "View", "Delete", "Ack Del", "Go To", "Chg Key", "Set Attr", "Menu", "Next Rec", "Redisplay", "New Sess", and "End Sess". The main title bar says "Projects Audit Trail". The status bar at the bottom shows "APX | ARC | PRJ 00 | Chg".

Projects Audit Trail

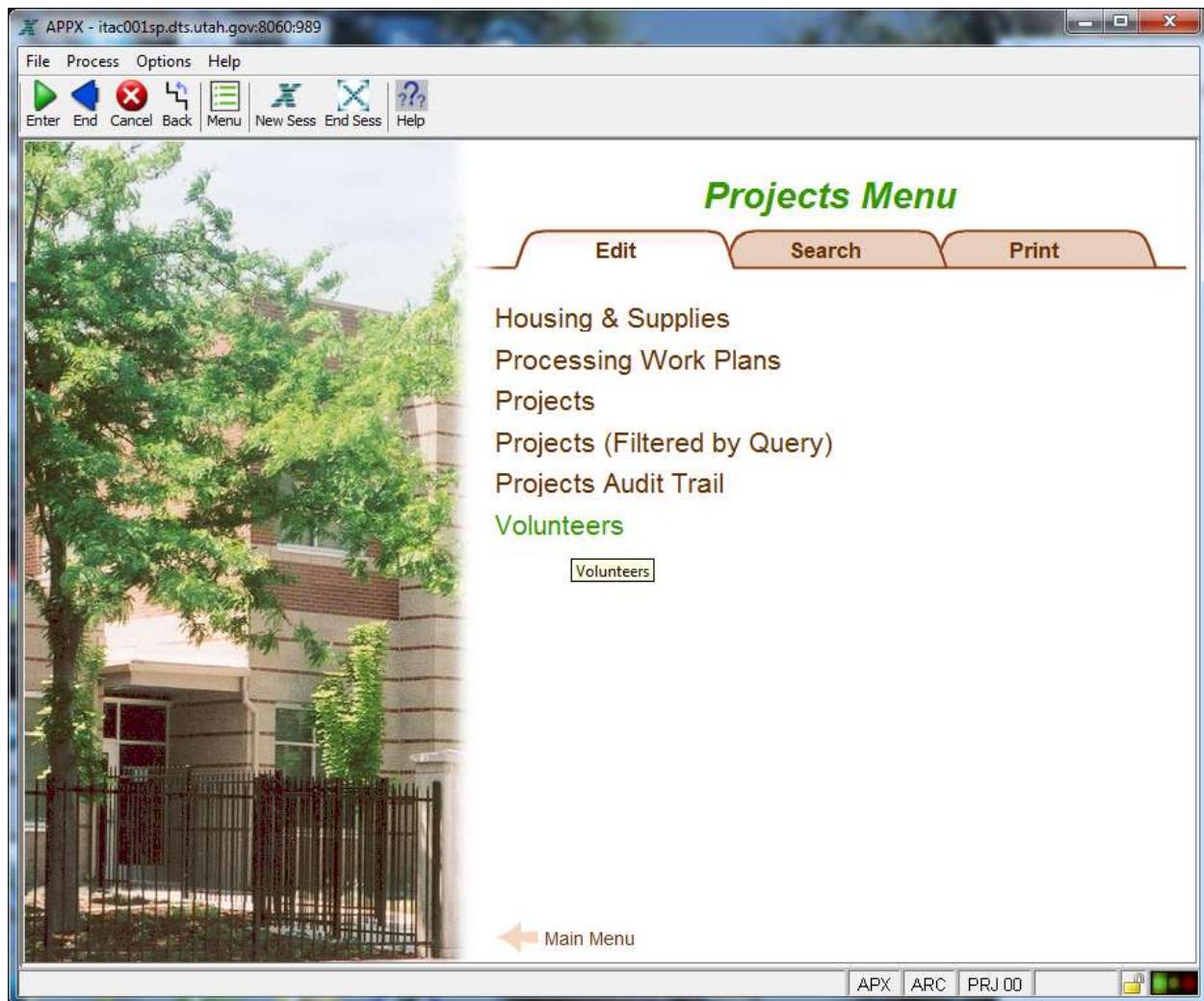
Proj ...	Date Added	U...	Ol...	N...	Old Status	New Status	
1	04/25/2013 12:27	APX	GMS	KR...			
1	04/25/2013 12:27	APX	GMS	KR...	In Progress	Completed	
1	04/26/2013 11:27	APX			Completed	In Progress	
4	06/03/2013 15:18	GMS		KR...			
4	06/03/2013 15:18	GMS		KR...		Pending	
1	06/03/2013 15:59	KR...	KR...	JEK			
7	06/05/2013 09:24	RRS		RRS			
7	06/05/2013 09:24	RRS		RRS		In Progress	
8	06/05/2013 16:58	GMS		KR...			
12	06/20/2013 17:45	GMS		KR...			
12	06/20/2013 17:45	GMS		KR...		Pending	
3	06/20/2013 17:49	GMS			In Progress	Stalled	
14	07/02/2013 08:23	LFO			In Progress	Pending	
15	07/02/2013 09:48	LFO			In Progress	Completed	
17	07/02/2013 09:50	LFO			In Progress	Completed	
16	07/08/2013 14:53	LFO			In Progress	Completed	
11	07/10/2013 14:37	GMS		GMS			
11	07/10/2013 14:37	GMS		GMS		Stalled	
23	07/10/2013 14:55	GMS		RRS			
21	07/15/2013 14:21	LFO			In Progress	Stalled	
19	07/15/2013 14:21	LFO			In Progress	Stalled	
21	07/17/2013 14:01	LFO			Stalled	In Progress	
3	07/22/2013 17:22	GMS			Stalled	In Progress	

< Exit OK Cancel Next >

[Bug report: there is no way to drill down and see the project record from this screen.]

Click Cancel to return to the Projects Menu.

Click on the Volunteers option. If you do not have security rights to the Volunteer file, some information will not be visible to you:



APPX - itac001sp.dts.utah.gov:8060:989

File Process Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Volunteers

Key: 9 Dates: 04/20/2010 - MM/DD/CCYY
Current:

Last Name: Johnson
First Name: Jeffery
Middle Name: Ogden
Address:
City, State, Zip: 801 [UT]
Phone 1: 801 Phone 2: 0
Type: Retiree/avocational Birthday: / /
Email:
Upload Photo
Clear to Remove: /usr/local/appx/archstg1/volunteers/jeffery_ogden.jpg

Supervisor: ABB Alan Barnett

Available

Monday AM: Tuesday AM: Wednesday AM: Thursday AM: Friday AM:
 Monday PM: Tuesday PM: Wednesday PM: Thursday PM: Friday PM:

Interests and Qualifications

Working with government records. I worked at BYU Library 3 years, LDS Church Archives 21 years, Utah State Archives 18 years.

Notes

Processing/Prep: Scanning:
 Records Management: Data Entry:
 Research Room: Social:
 Indexing: Work Alone:

< Exit Additional Data OK Cancel Hours Worked Print Next >

APX ARC PRJ 00 Chg

Provide the information requested regarding the volunteer. Note that the address, phone, and email are considered private information. To upload a photo, click Upload Photo, click the folder icon to navigate to your mapped drives, and choose an image. To remove a photo, delete the data in the Clear to Remove field.

This is the first of two screens for the one record. Click Additional Data for more information:

APPX - itac001sp.dts.utah.gov:8060:989

File Process Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Volunteers

Key: 9

Name: Johnson, Jeffery Ogden

Convicted of Crime:

References

Emergency Contact

LAN Login ID:
APPX Login ID:
APPX Password:

Intern/School Advisor

Name:
Phone:
Email:

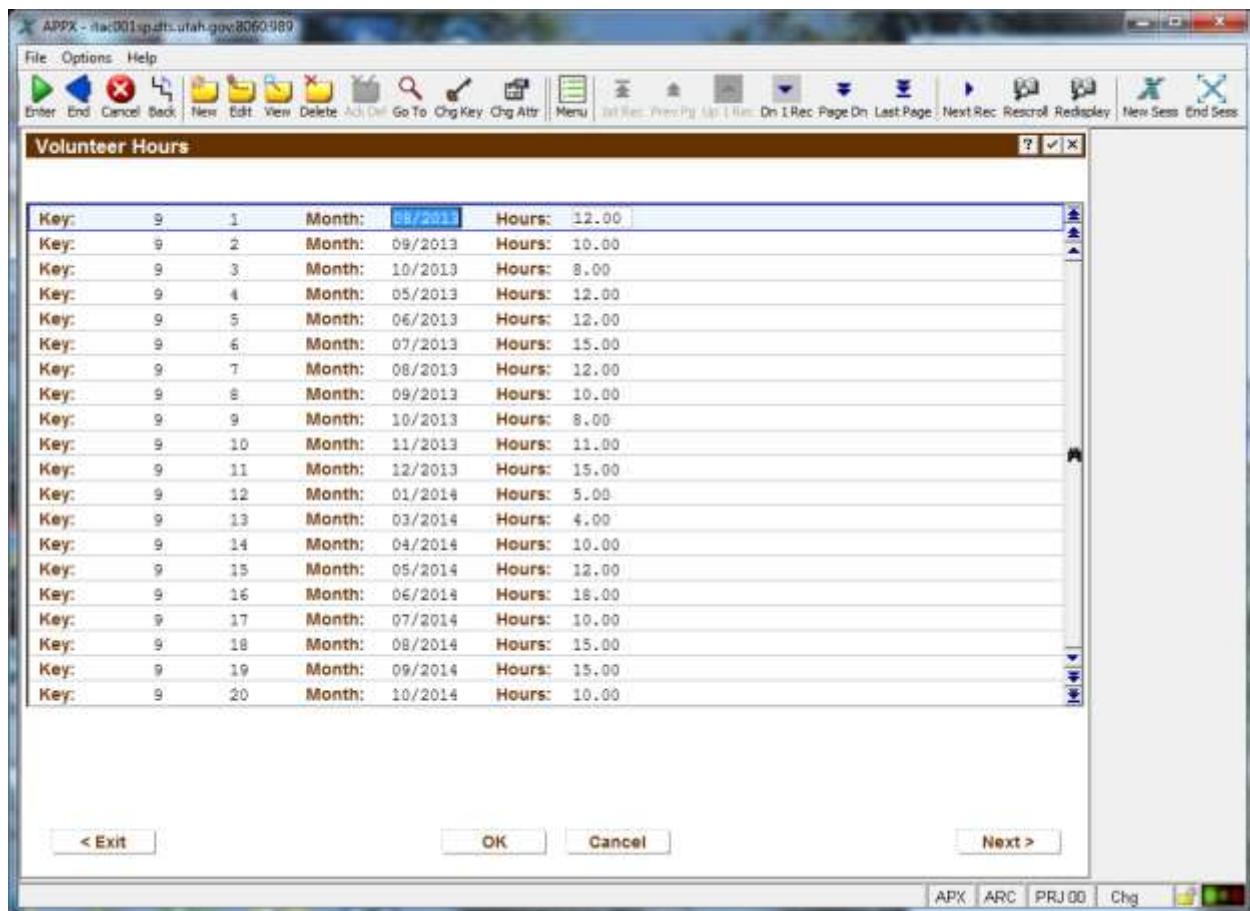
Attachments

< Exit OK Cancel APX ARC PRJ 00 Chg



The volunteer's resume or volunteer application may be attached using the Attachments option. Click OK to save your changes or Cancel to return to the Volunteer record.

Click Hours Worked.



For each month, total the number of hours the volunteer donated. Click OK to save your changes or Cancel to return to the Volunteer screen.

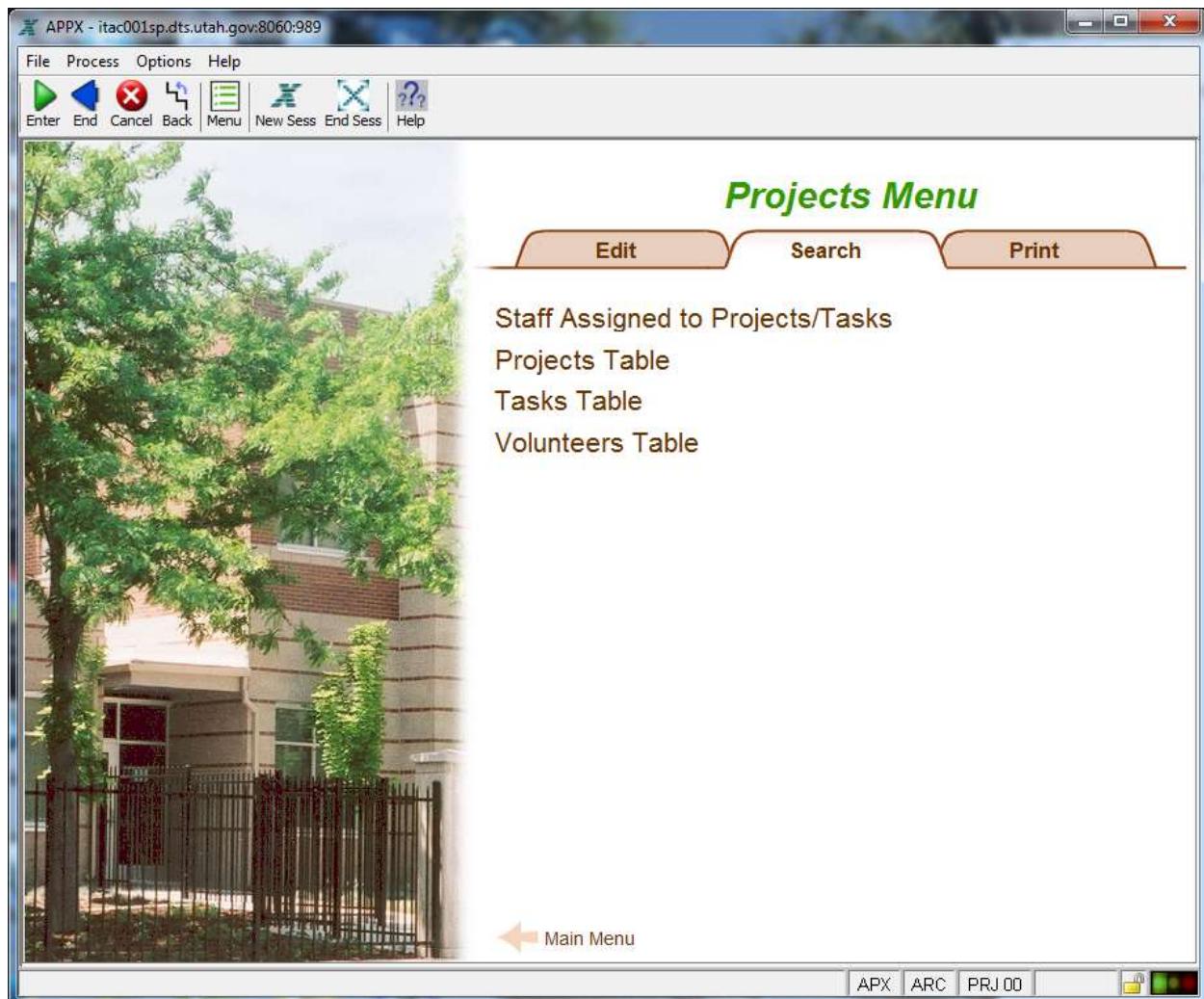
Click the Print button.

This is a PDF report. There is no query, as it just prints the one record.

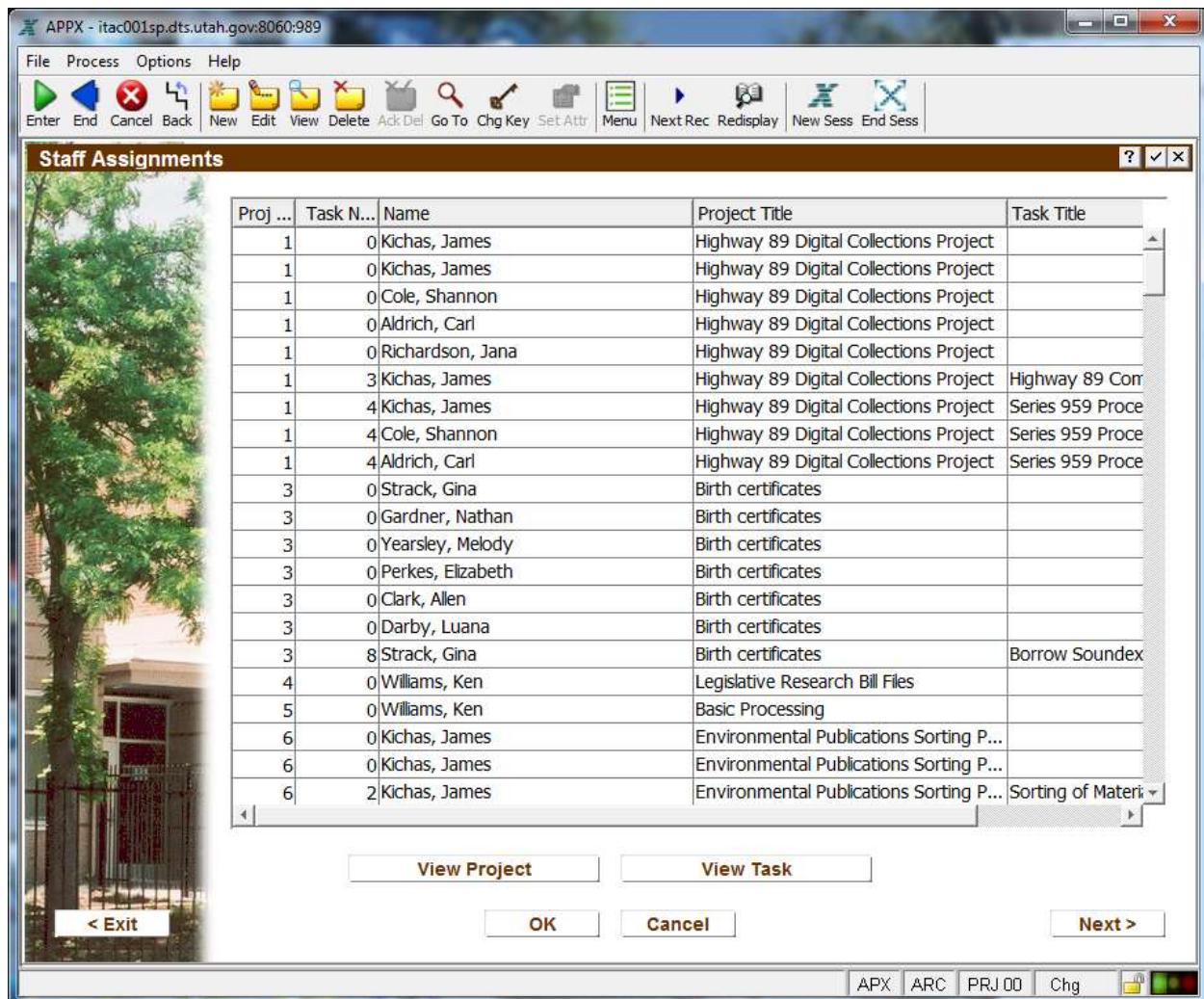
Since the print file contains private information, it will not be displayed here.

Click Continue to return to the Volunteer screen, and then click Cancel to return to the Projects Menu.

Click on the Search Tab of the Projects Menu:

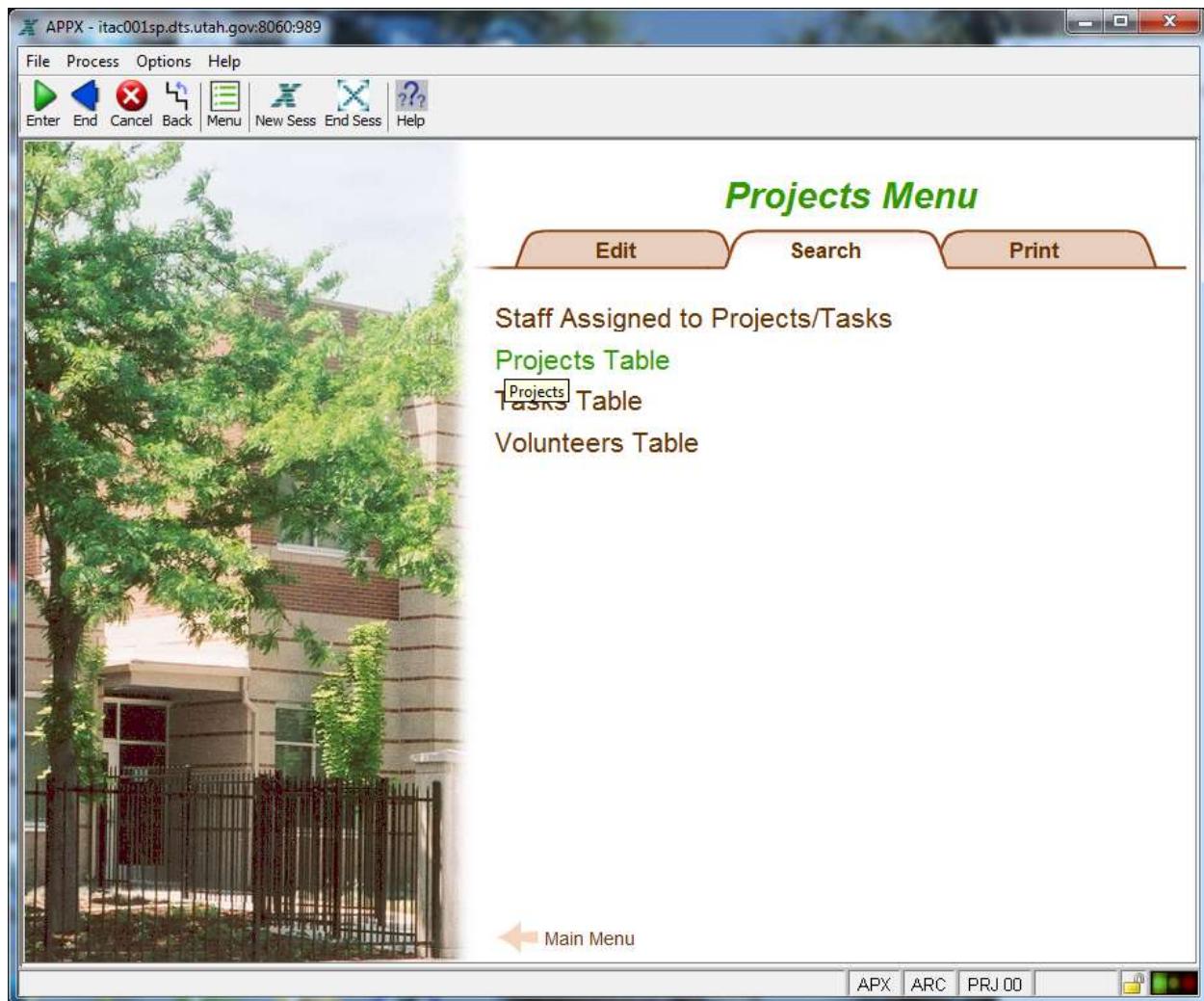


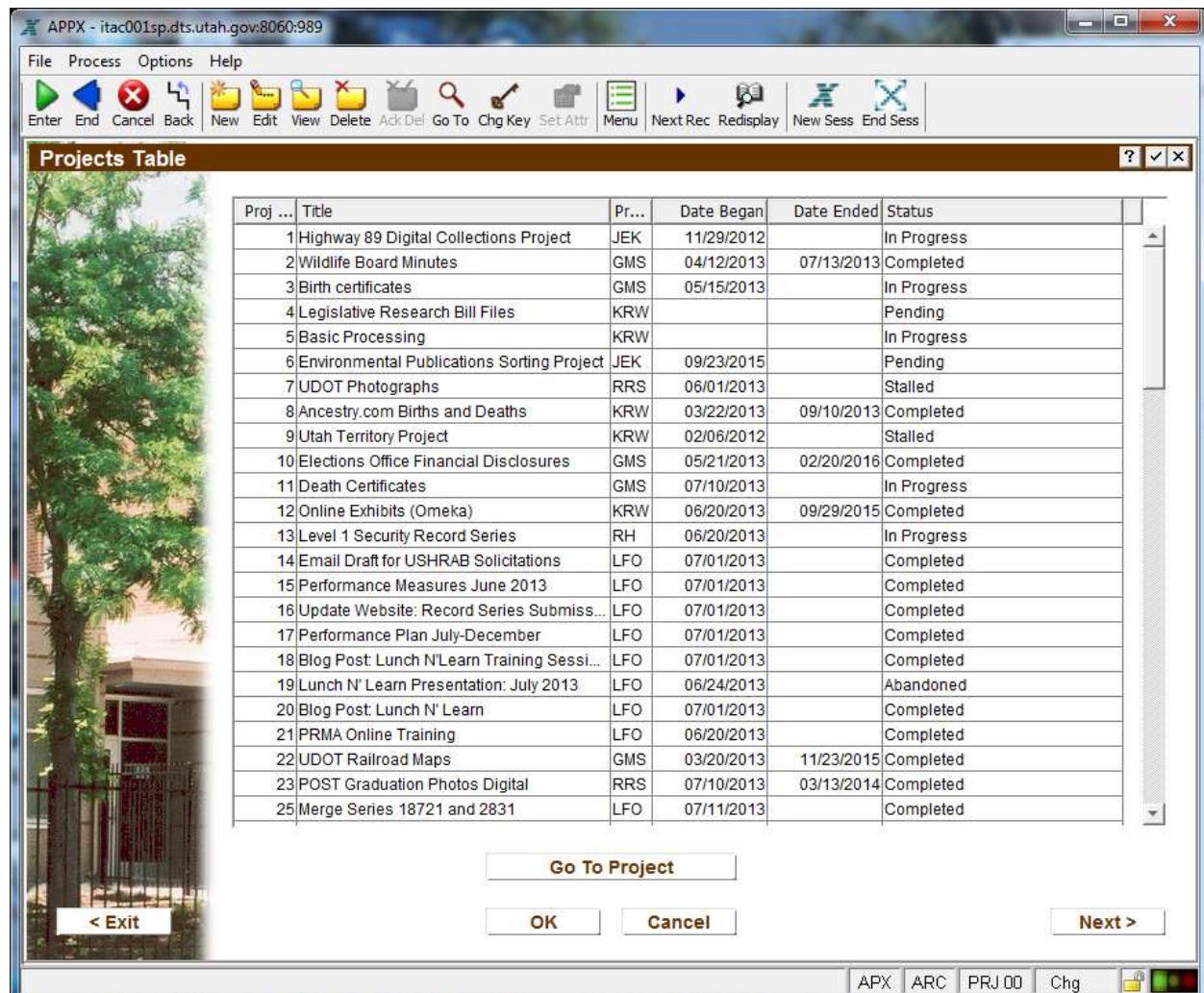
Select Staff Assigned to Projects/Tasks.



Each project or task that has been assigned to someone will be found in this table. If the Task Number is zero, that means the entry represents the project as a whole. If the Task Number has another value, it represents a specific task. To find the projects and tasks you are assigned to, sort the Name column. Double-click a row to go to that project, or single click the row and then click on View Project to drill down to the project, or View Task to view the task. Click Cancel to return to the Search tab of the Projects Menu.

Click on the Projects Table option:

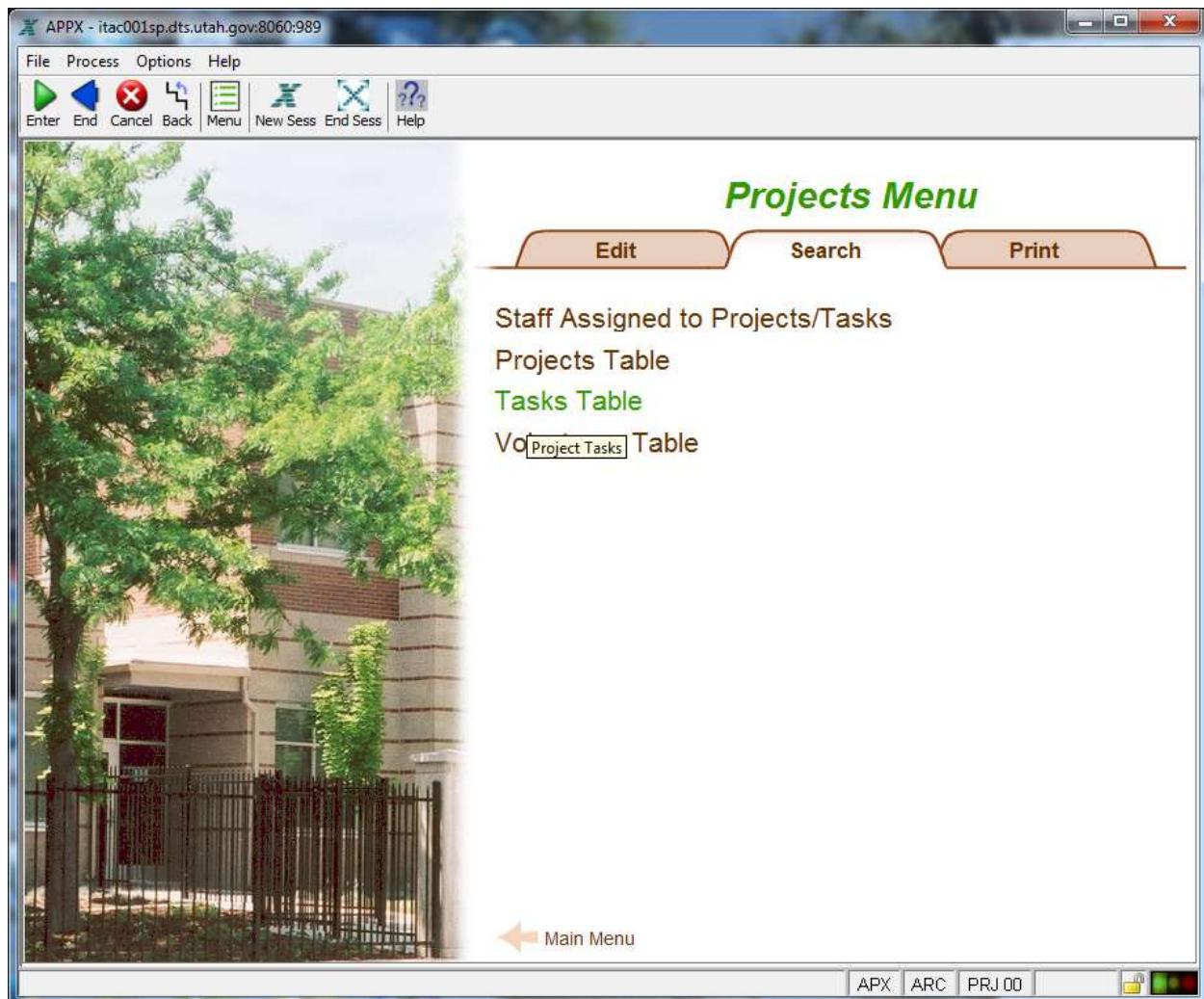


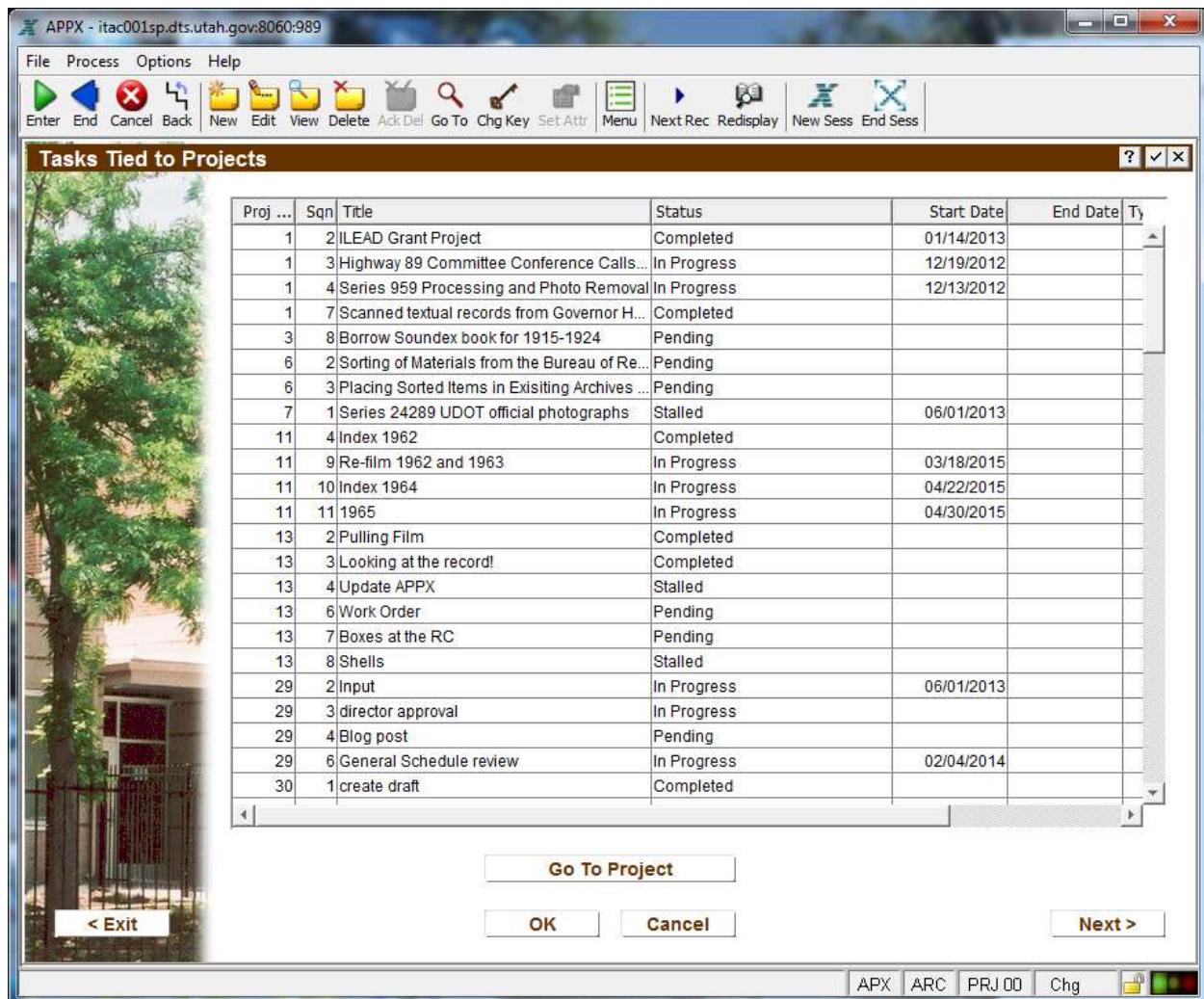


This lists all projects in a table widget which can be sorted by column. Double-click on a row to select a project, or single-click and then click the Go To Project button.

Click Cancel to return to the Search tab of the Projects Menu.

Click the Tasks Table option:

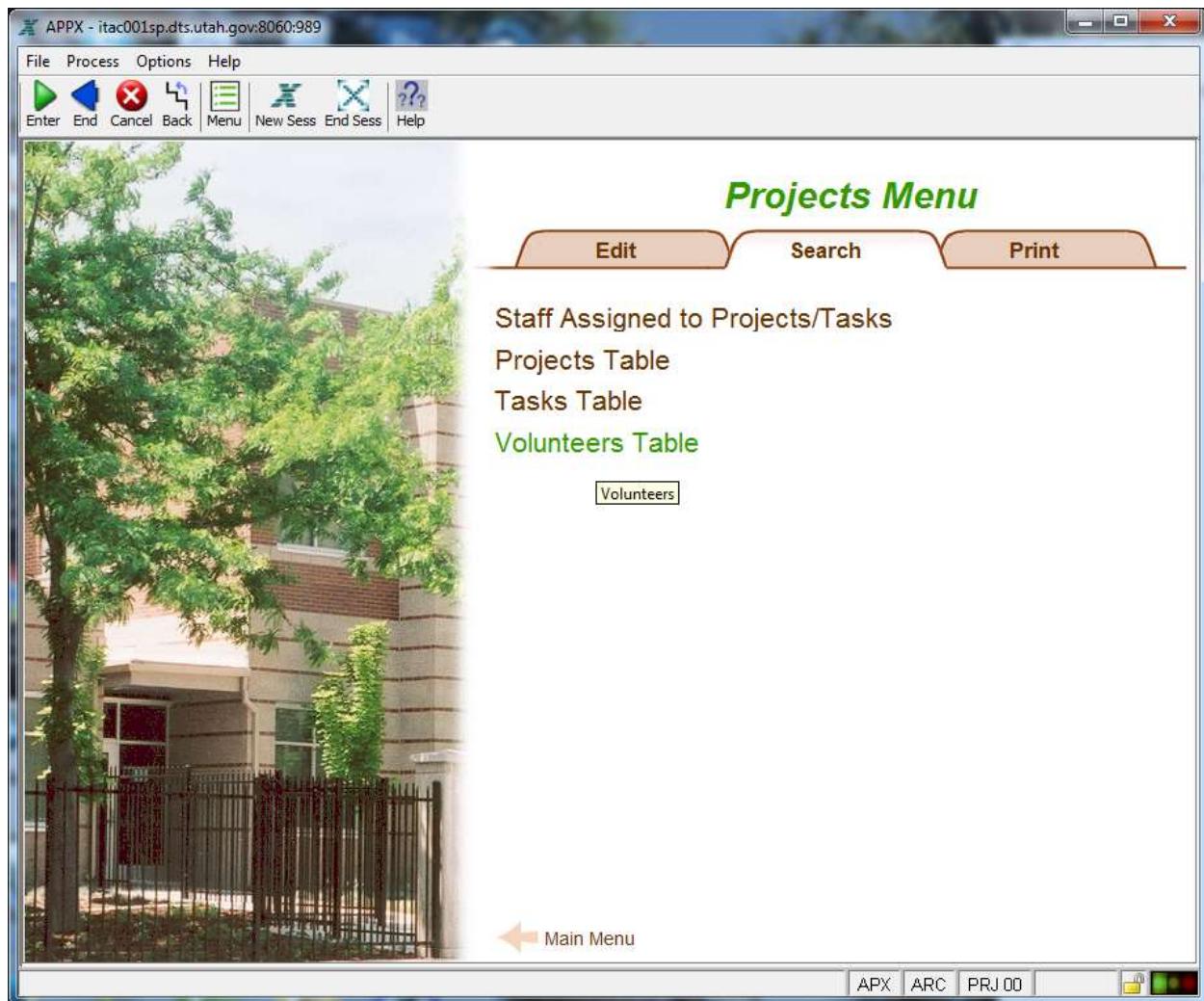


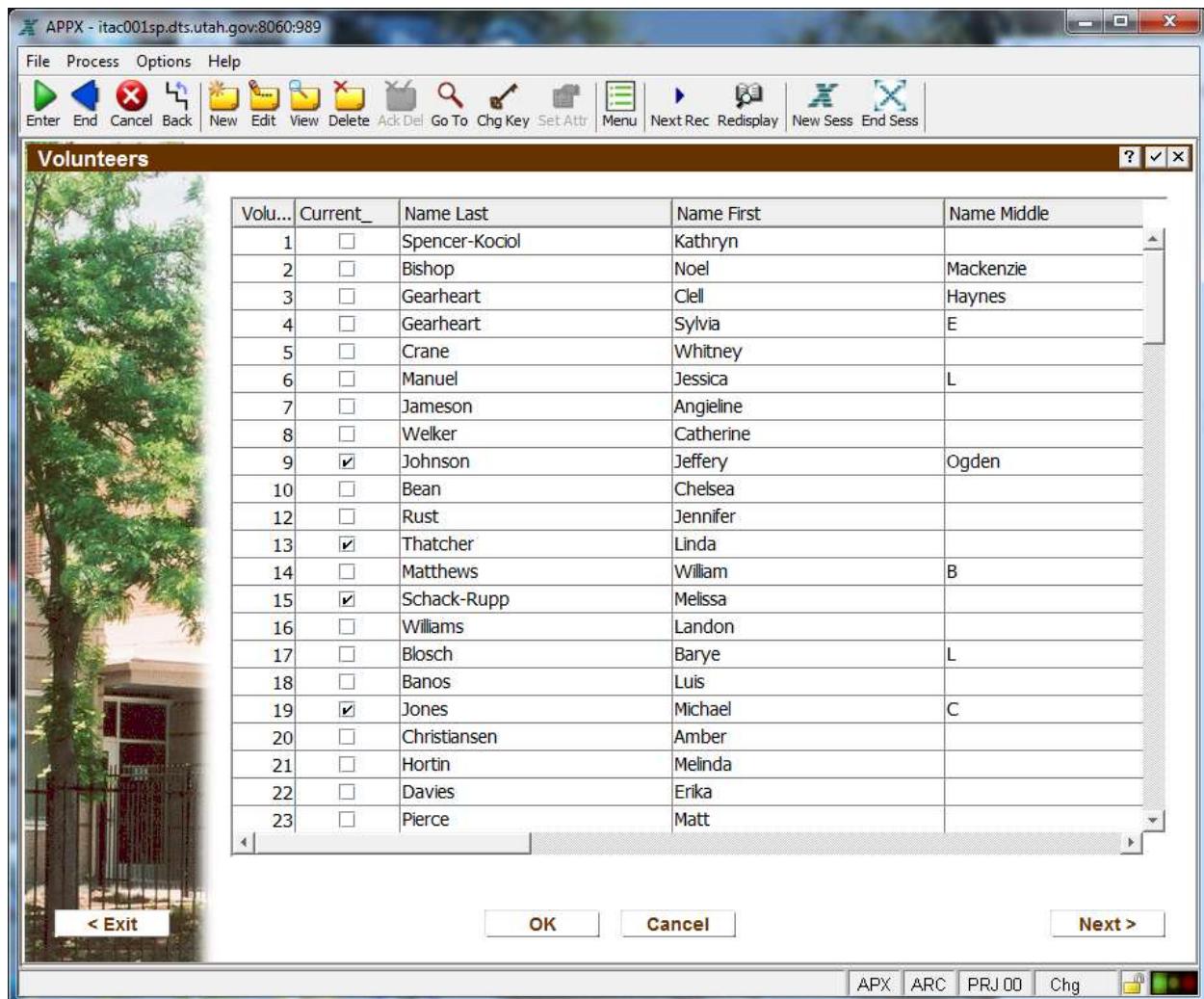


This table lists all tasks, and can be sorted by column. To view a project associated with the task, double-click a row, or single-click and then click Go To Project. [Bug report: there is no way from this screen to drill down directly to a task's record. Instead, the user has to go to the project first, and then find the task they originally selected in the table.]

Click Cancel to return to the Search tab of the Projects Menu.

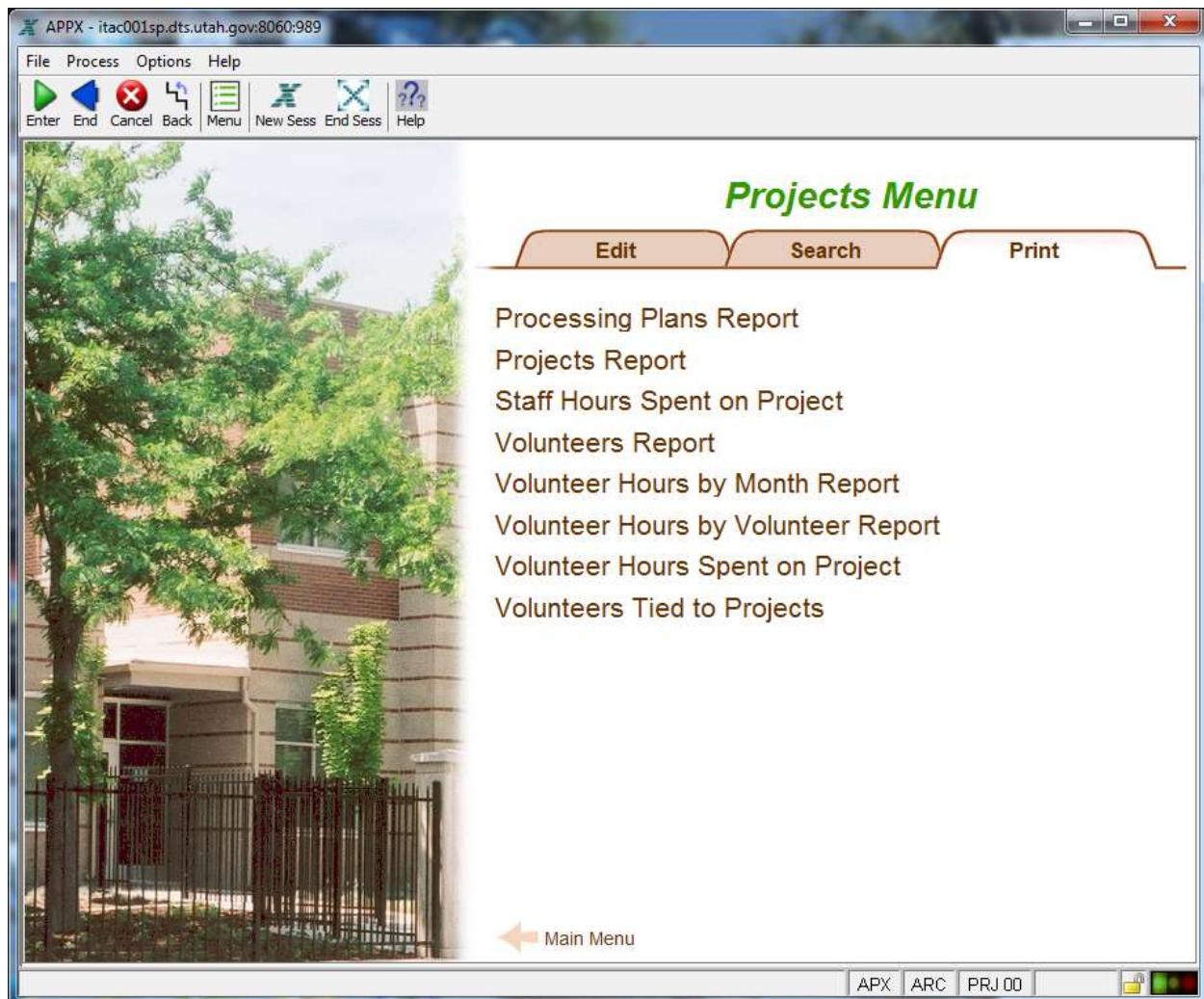
Click on the Volunteers Table option:



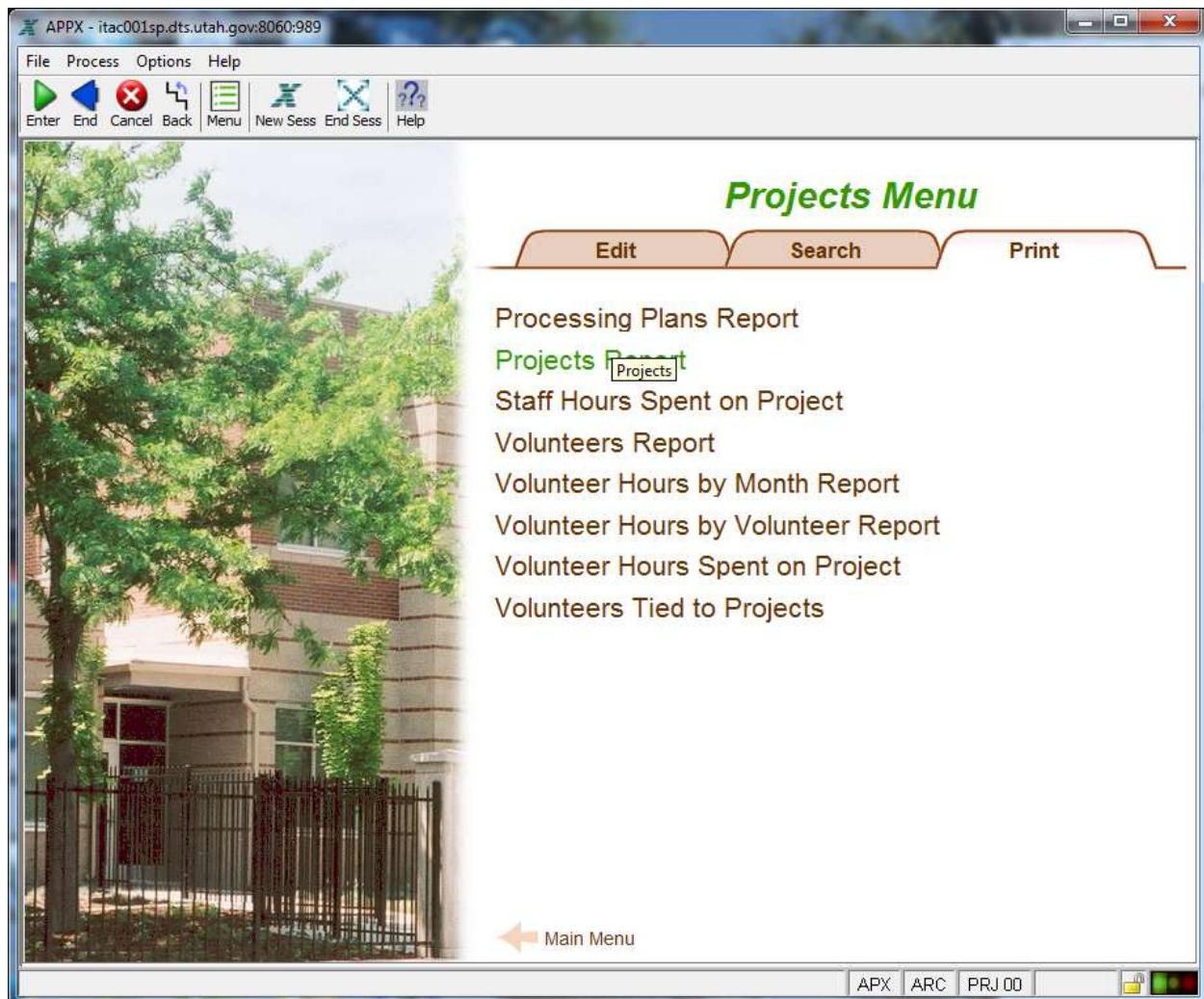


This provides a list of volunteers, an indication of whether or not they are still acting as a volunteer, their contact information, and their schedules. This allows you to sort by all volunteers who are available on Thursday afternoons, for instance. To view the detail record about the volunteer, double-click a row to drill down. Click Cancel to return to the Search tab of the Projects Menu.

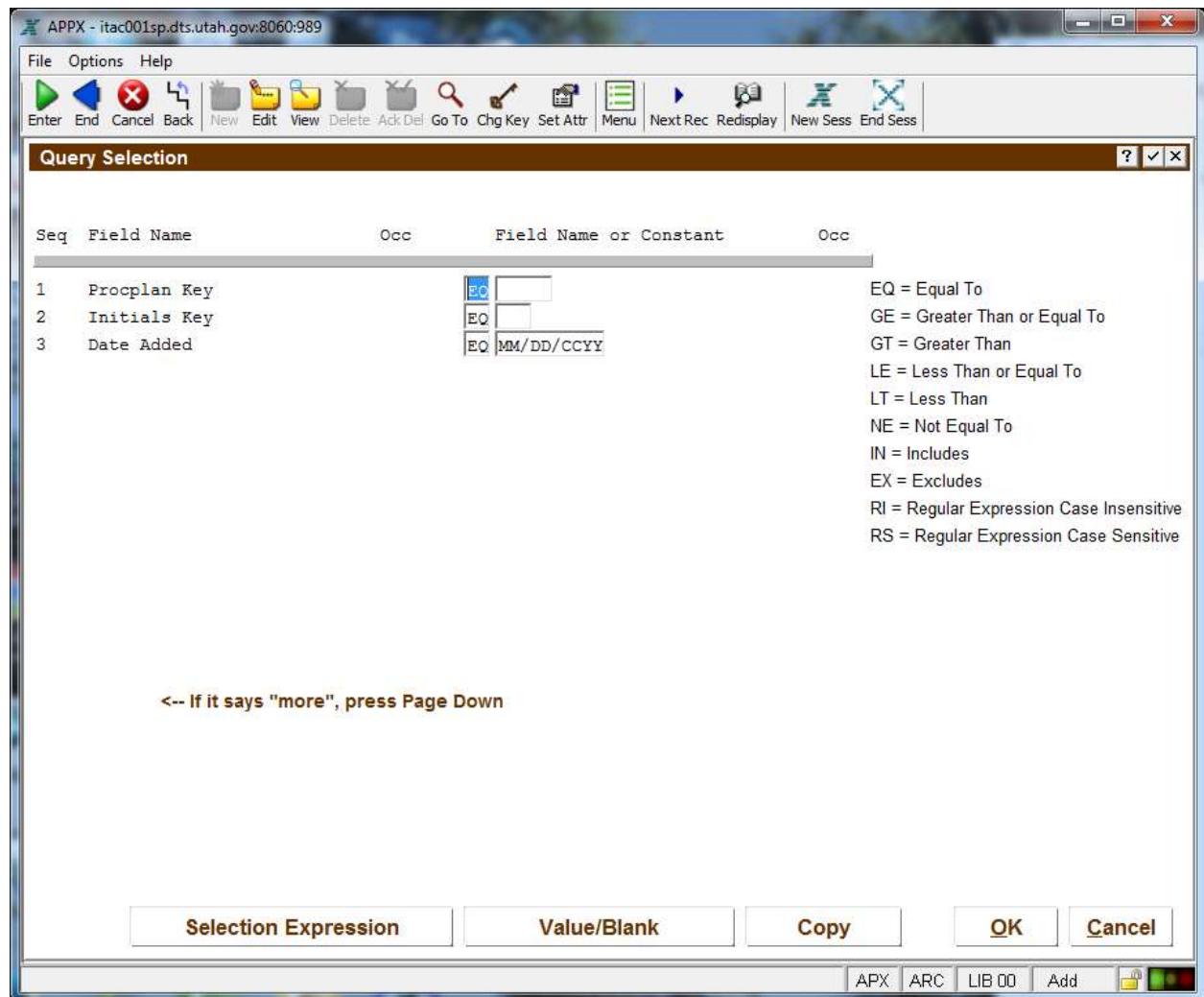
Click on the Print tab of the Projects Menu:



Click on Processing Plans Report.



This is a PDF report. The query asks for the processing plan key, the initials of the person whose processing plan it is, or date added:



Screenshot of a software interface showing a processing work plan. The main window displays project details and a list of existing and new series. A sidebar on the right provides document management options like Export PDF, Edit PDF, and Sign.

Processing Work Plan: 1 **Added By:** APX 04/15/2013

Title: testing

Processor: Strack, Gina

Existing Series:

Series ID	Series Description	Count	cf	0	rl		
25232	Photographs	446	Governor Herbert	0	cf	0	rl
13373	Press releases	11	Archives and Records Service	0	cf	0	rl
26002	Programs of the First Lady	446	Governor Herbert	0	cf	0	rl

New Series: Daily journal, 2002-2004; Declarations and proclamations, 1995-2003; Governor's Olympic collection; Governor's Report on the Worker's Compensation Fund, 2003. See preliminary survey of folder arrangement by Michael Smith ca. 2005

Appraisal: Governor's records are largely historical. Some weeding may occur for exact duplicates, blank forms, and "housekeeping" documents.

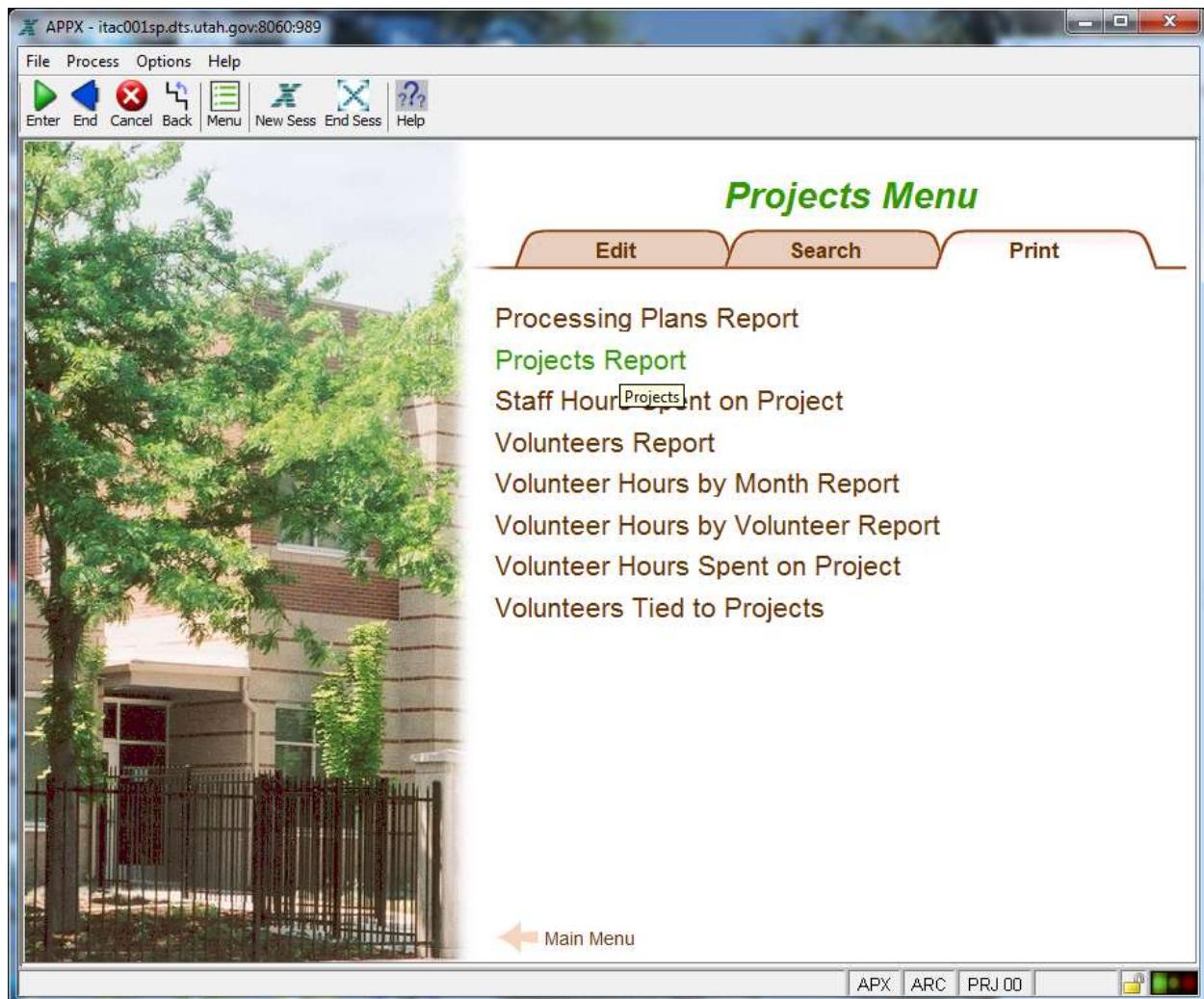
Holdings: Project is focused on electronic records copied from Governor's office (as such, no real official transfer).

Document Actions:

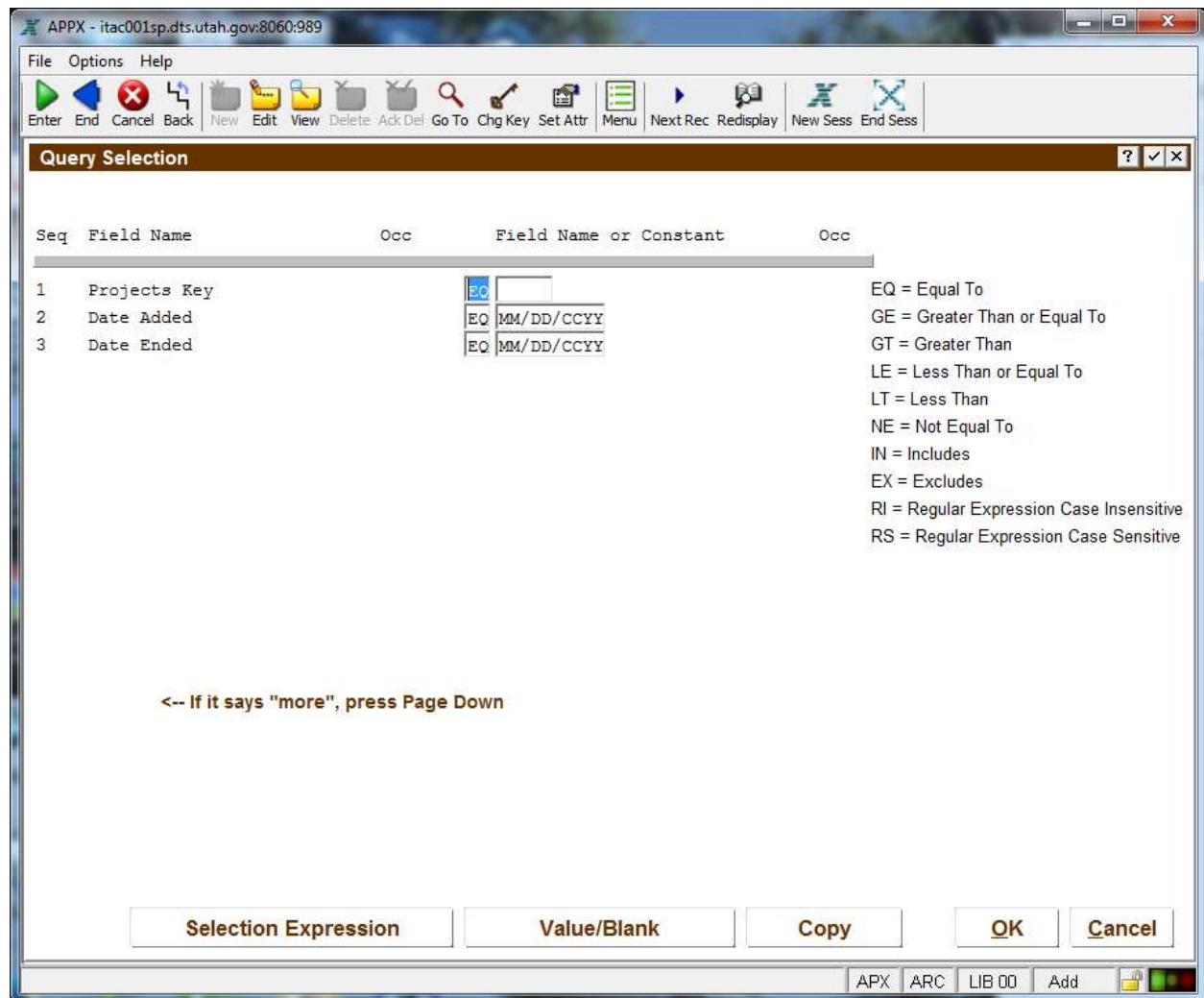
- Export PDF
- Archive Export PDF
- Document Title: 01100001-01101200
- Document To: [Inbox \(0\)](#) [Recent \(0\)](#)
- Document Language: English (US) - Change
- Download:**
- Create PDF
- Edit PDF
- Comment
- Control Risks
- Fill & Sign
- Send for Signature
- Send to Task
- Show and download in the Document Cloud

This lists each processing plan matching the terms of the query. Click Continue to return to the Print tab of the Projects Menu.

Click on Projects Report.



This is a PDF report. The query asks for the projects key or date added/ended.



The screenshot shows a digital exhibit interface. On the left, a project summary for "Project 1" is displayed:

Project 1

Project Title: Highway 89 Digital Collections Project
Description: This is an ongoing collaborative project between multiple Utah institutions working together to build an online digital exhibit documenting the history and various collections related to the historic Highway 89. Founding institutions include the Utah State Archives, Utah State University, Brigham Young University Special Collections, Southern Utah University, Salt Lake County Archives, and Northern Arizona University.
Dates: 11/29/2012 -
Supervisor: Kichas, James

Related Series:

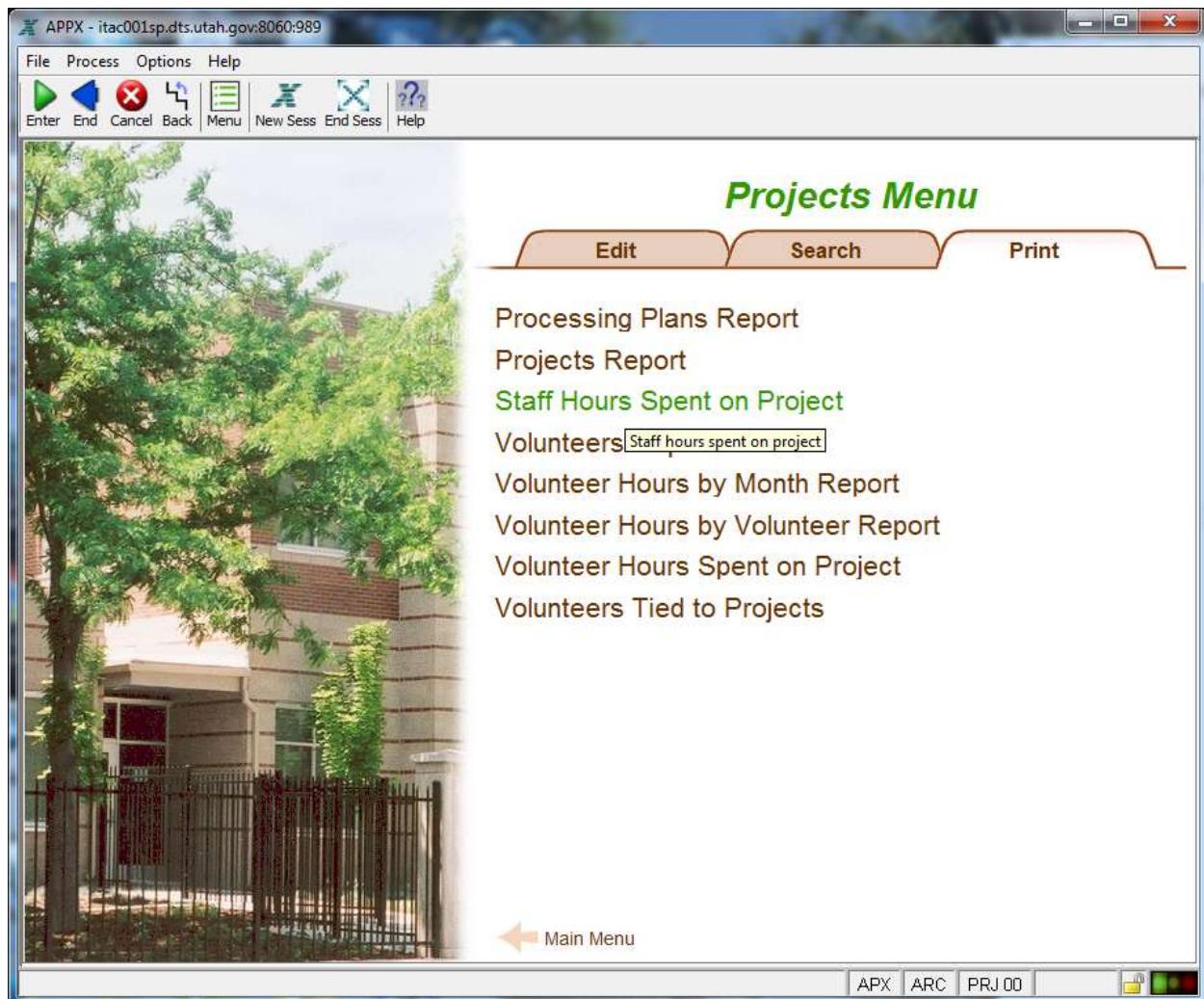
809 Construction project administrative	1512 Duchesne Co. Clerk
Notes: Targeted as a potential resource series during first collection survey for the H89 project.	
887 Highway maps	1177 Transportation Department
Notes: Targeted as a potential resource series during first collection survey for the H89 project.	
921 Photographs	831 Road Commission
Notes: Targeted as a potential resource series during first collection survey for the H89 project.	
922 Publications	831 Road Commission
Notes: Targeted as a potential resource series during first collection survey for the H89 project.	
959 Outdoor advertising sign inventorie	520 Highway Department

On the right, a sidebar menu is visible:

- Export PDF
- Archive Export PDF
- Document PDF File to Word or Excel Online
- Selected PDF Title: 0110000148105... .pdf
- Document to: Microsoft Word (Word)
- Document Language: English (US) - Change
- Download**
- Create PDF
- Edit PDF
- Comment
- Control Risks
- Fill & Sign
- Send for Signature
- Send by Email
- Show and download in the Document Cloud

The resulting report lists all the projects contained within the query parameters. Click Continue to return to the Print tab of the Projects Menu.

Click Staff Hours Spent on Project.



This is a PDF report. For the report to be valuable, actual staff hours spent on projects first needs to be entered. The query asks for the project's key, status, and date began or ended.

APPX - itac001sp.dts.utah.gov:8060:989

File Options Help

Enter End Cancel Back | New Edit View Delete Ack Del Go To Chg Key Set Attr Menu | Next Rec Redisplay New Sess End Sess

Query Selection

?

Seq	Field Name	Occ	Field Name or Constant	Occ
1	Projects Key	EQ		EQ = Equal To GE = Greater Than or Equal To GT = Greater Than LE = Less Than or Equal To LT = Less Than NE = Not Equal To IN = Includes EX = Excludes RI = Regular Expression Case Insensitive RS = Regular Expression Case Sensitive
2	Status	EQ		
3	Date Began	EQ	MM/DD/CCYY	
4	Date Ended	EQ	MM/DD/CCYY	

<- If it says "more", press Page Down

Selection Expression Value/Blank Copy OK Cancel APX ARC LIB 00 Add

Project Num: 1 Date Began: 11/19/2012 Date Ended:
Title: Highway 89 Digital Collections Project
Description: This is an ongoing collaborative project between multiple Utah institutions working together to build an online digital exhibit documenting the history and various collections related to the historic Highway 89. Founding institutions include the Utah State Archives, Utah State University, Brigham Young University Special Collections, Southern Utah University, Salt Lake County Archives, and Northern Arizona University.

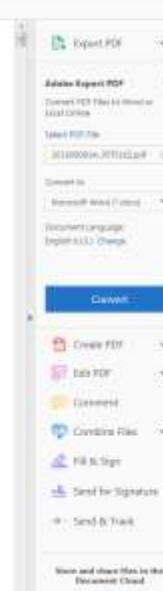
Hours Worked:
JEK Kichas, James

-- Staff hours on project Totals -->
.00

-- Staff assigned to project Totals -->
.00

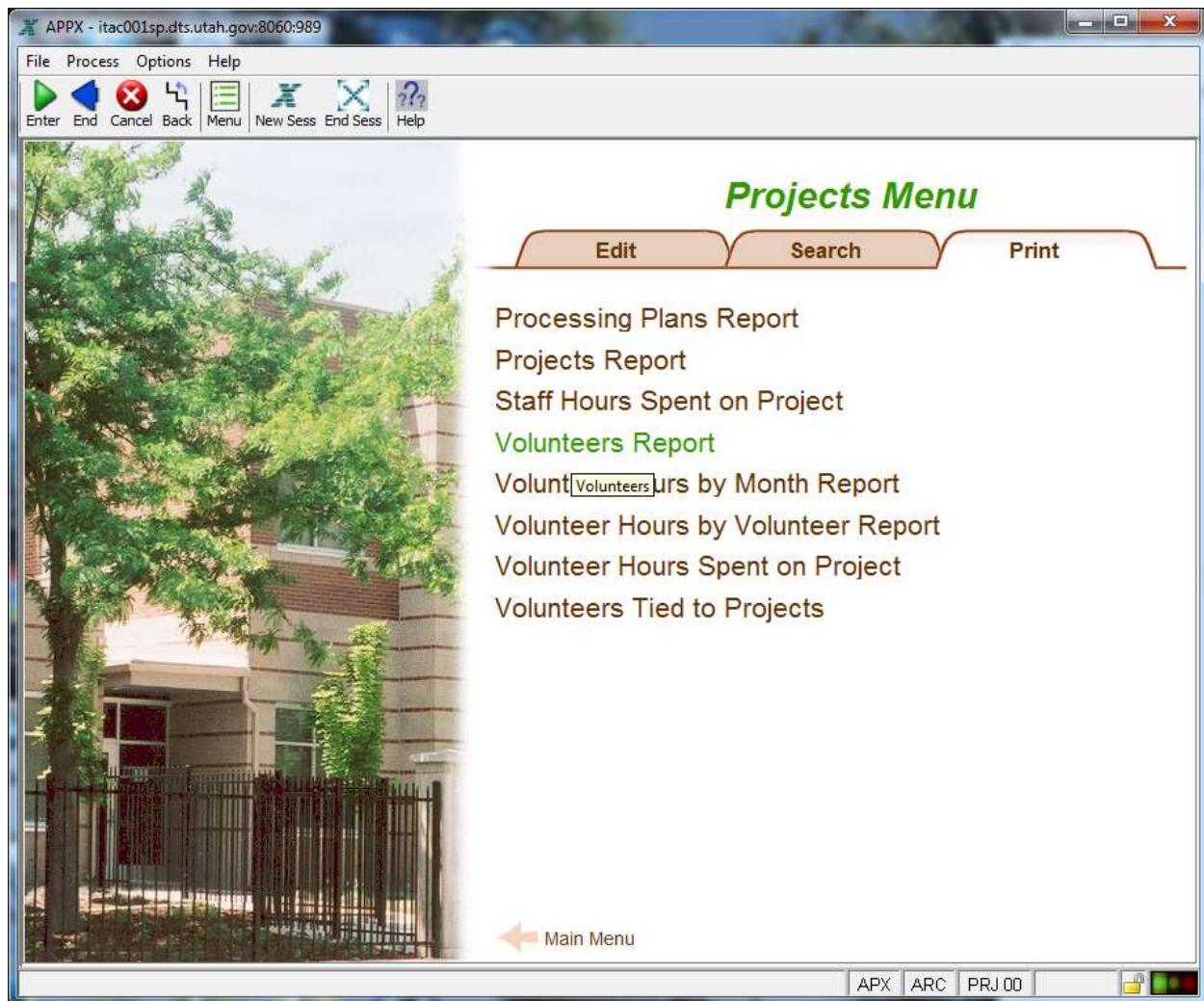
Project Num: 2 Date Began: 04/12/2013 Date Ended: 07/13/2013
Title: Wildlife Board Minutes
Description: Recordings not accessible to patron in original format/media.

Hours Worked:

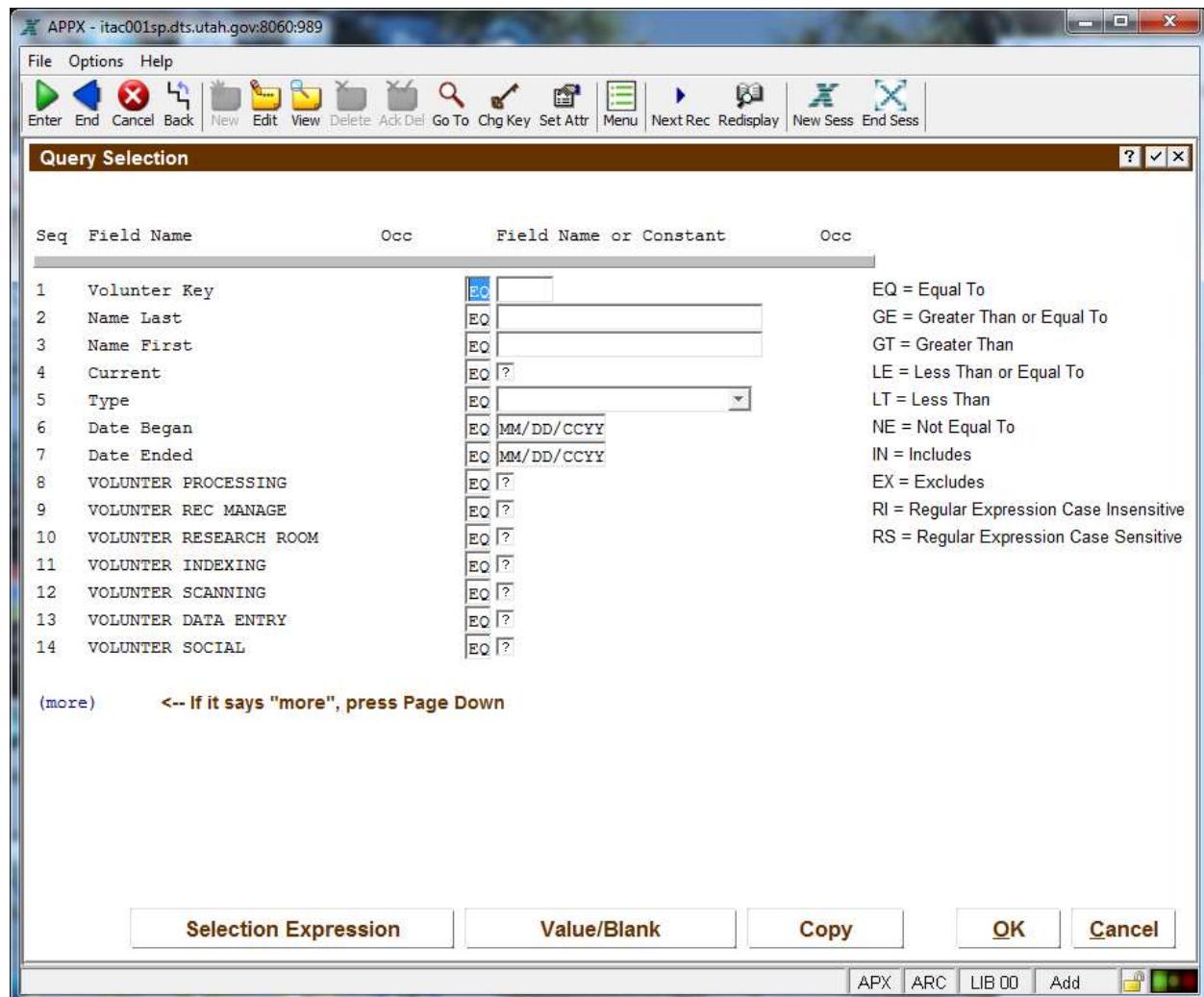


Click Continue to return to the Print tab of the Projects Menu.

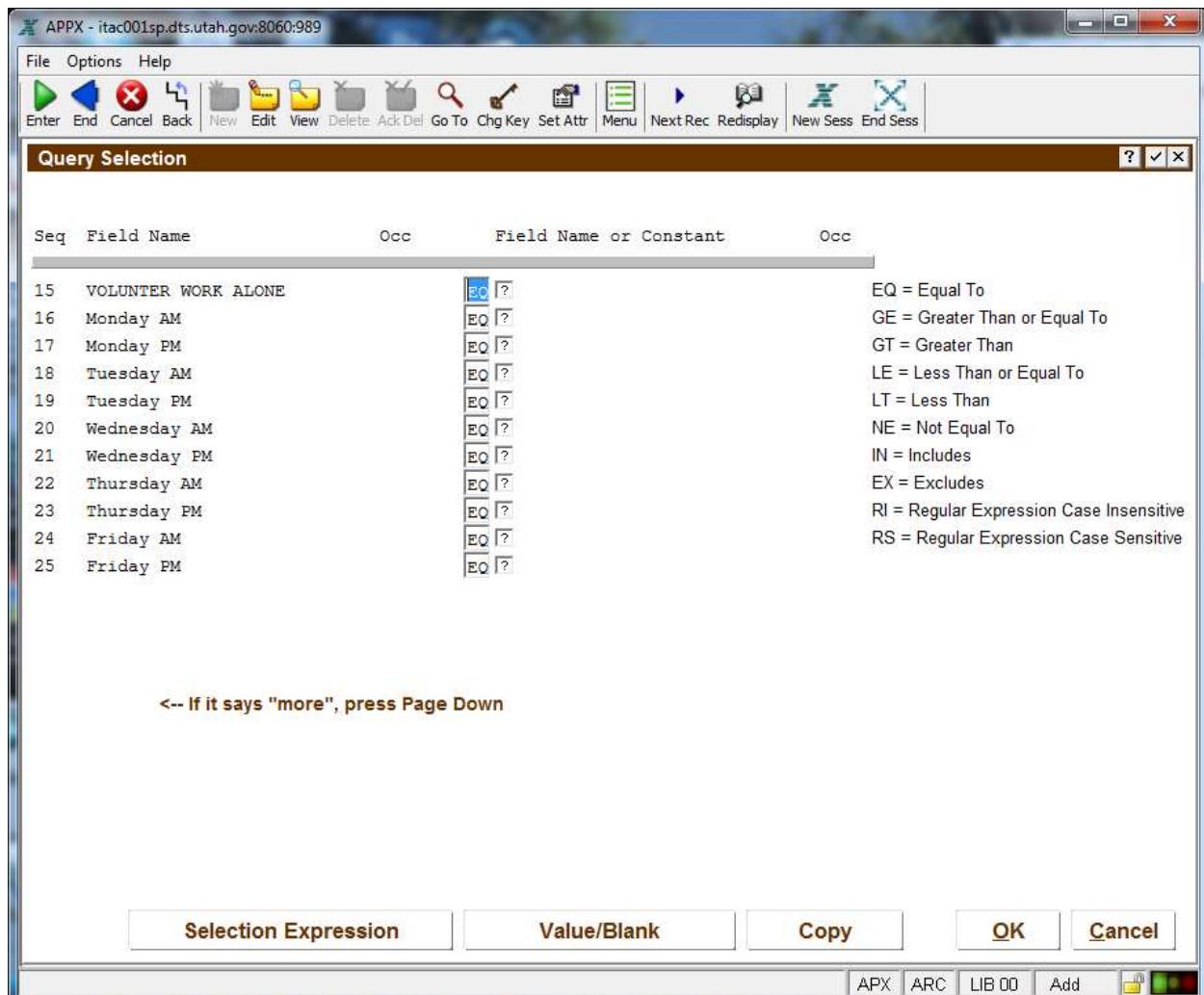
Click Volunteers Report:



This is a PDF report. The query asks for several data elements about volunteers, enough so that to see the full list, you must use your Page Down key on the keyboard. Here's the first page:



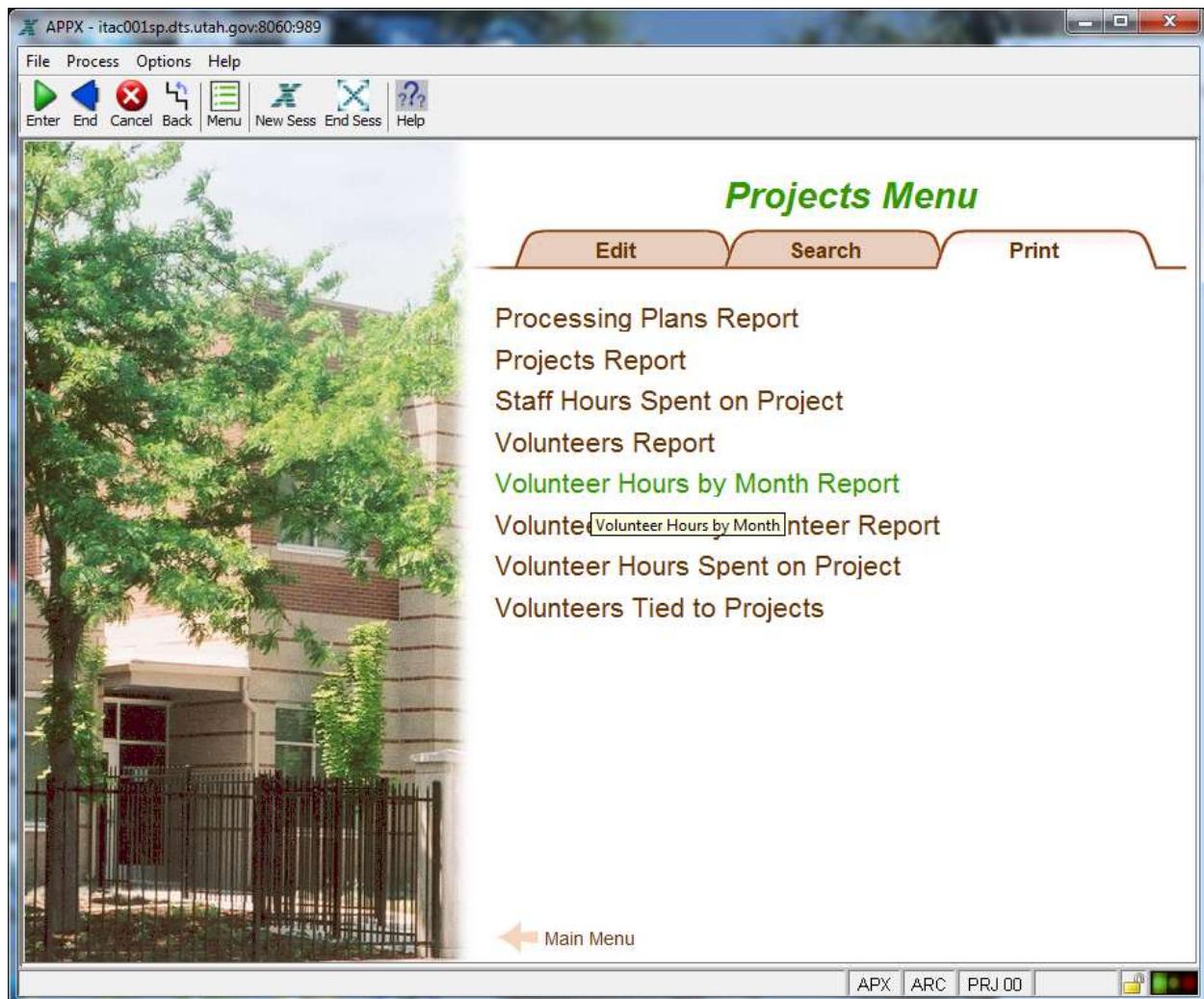
And here's the second page:



The resulting report lists each volunteer that met the parameters of the query. Since the information contains private data, it will not be displayed here.

Click Continue to return to the Print tab of the Projects Menu.

Click Volunteer Hours by Month Report:



This is a PDF report. The query asks for month range as well as volunteer name.

APPX - itac001sp.dts.utah.gov:8060:989

File Options Help

Enter End Cancel Back | New Edit View Delete Ack Del Go To Chg Key Set Attr Menu | Next Rec Redisplay New Sess End Sess

Query Selection

?

Seq	Field Name	Occ	Field Name or Constant	Occ
1	Month		EQ MM/CCYY	EQ = Equal To
2	Month		LE MM/CCYY	GE = Greater Than or Equal To
3	Name Last		EQ	GT = Greater Than
4	Name First		EQ	LE = Less Than or Equal To
5	Name Middle		EQ	LT = Less Than

NE = Not Equal To
IN = Includes
EX = Excludes
RI = Regular Expression Case Insensitive
RS = Regular Expression Case Sensitive

<- If it says "more", press Page Down

Selection Expression Value/Blank Copy OK Cancel

APX ARC LIB 00 Add

Archives
Volunteer Hours by Month

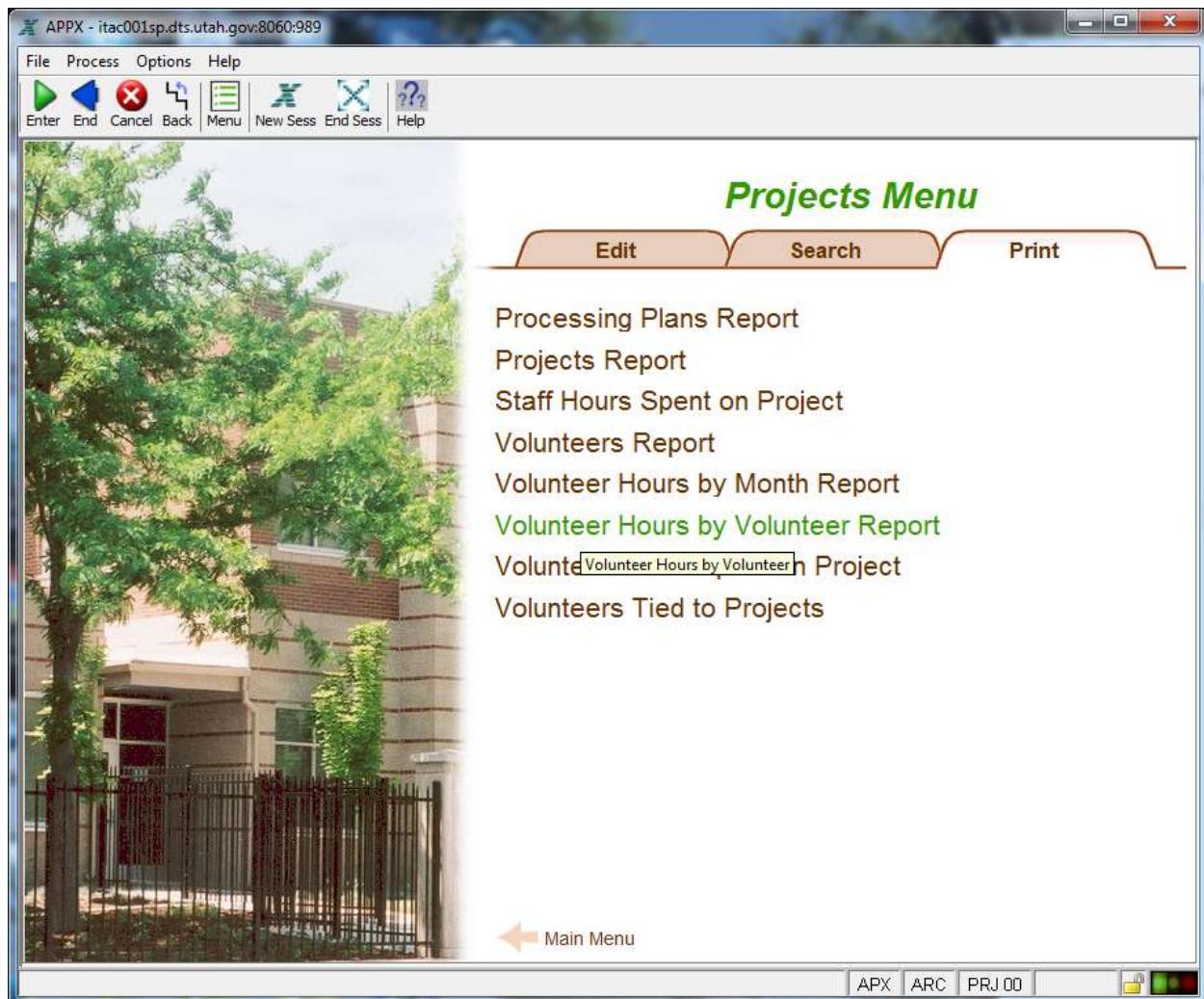
Page: 1
06/09/16 14:26
APX

Month	Hours	Volun	Key	Name Last
Month: April 2016	Hours: 4.00	Volunteer:	13	Thatcher Linda
Month: April 2016	Hours: 10.00	Volunteer:	15	Schack-Rupp Melissa
Month: April 2016	Hours: 4.00	Volunteer:	19	Jones Michael
Month: April 2016	Hours: 4.00	Volunteer:	31	Edison Carol
Month: April 2016	Hours: 62.00	Volunteer:	42	Clark Allen
Month: April 2016	Hours: 10.00	Volunteer:	54	Armstrong Michelle
Month: April 2016	Hours: 12.00	Volunteer:	151	Wassmer Mike
Month: April 2016	Hours: 24.00	Volunteer:	153	Martinez Luis
Month: April 2016	Hours: 2.00	Volunteer:	155	Brimhall

This report provides a list of hours per volunteer and a grand total for the query set at the bottom of the last page.

Click Continue to return to the Print tab of the Projects Menu.

Click on the Volunteer Hours by Volunteer Report.



This is a PDF report. The query asks for the volunteer key or name, plus a month range.

APPX - itac001sp.dts.utah.gov:8060:989

File Options Help

Enter End Cancel Back | New Edit View Delete Ack Del Go To Chg Key Set Attr Menu | Next Rec Redisplay New Sess End Sess

Query Selection

?

Seq	Field Name	Occ	Field Name or Constant	Occ
1	Volunter Key	EQ		EQ = Equal To
2	Name Last	EQ		GE = Greater Than or Equal To
3	Name First	EQ		GT = Greater Than
4	Name Middle	EQ		LE = Less Than or Equal To
5	Month	GE	MM/CCYY	LT = Less Than
6	Month	LE	MM/CCYY	NE = Not Equal To

IN = Includes
EX = Excludes
RI = Regular Expression Case Insensitive
RS = Regular Expression Case Sensitive

<- If it says "more", press Page Down

Selection Expression Value/Blank Copy OK Cancel

APX ARC LIB 00 Add

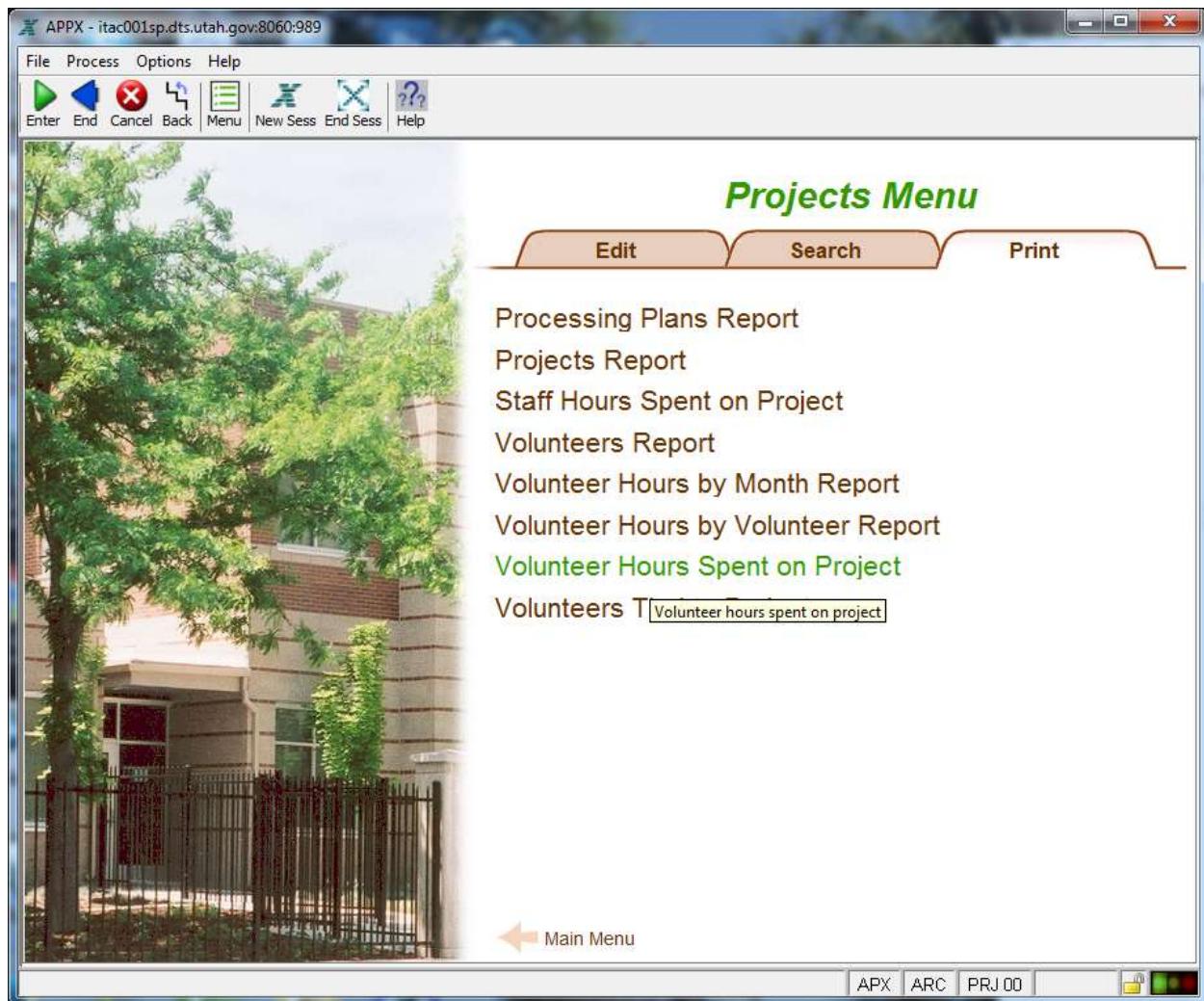
The screenshot shows a Microsoft Word document titled "Archives Volunteer Hours". The title is centered at the top. On the right side, there is a status bar with "Page: 1", "06/09/16 14:29", and "APX". A ribbon menu is visible at the top with tabs like Home, Tools, etc. On the far right, there is a ribbon-like sidebar with various options: "Expert PDF", "Archive Expert PDF", "Selected PDF File", "Document", "Document Language", "Create", "Create PDF", "Edit PDF", "Comment", "Control Risks", "Fill & Sign", "Send for Signature", "Send by Email", and "Show and share this in the Document Cloud".

Volun Key	Volunteer Name	Month	Hours
	Thatcher, Linda		
		Month: August 2013	Hours: 4.00
		Month: September 2013	Hours: 3.00
		Month: October 2013	Hours: 4.00
		Month: March 2013	Hours: 3.00
		Month: November 2013	Hours: 2.00
		Month: December 2013	Hours: 4.00
		Month: January 2014	Hours: 4.00
		Month: March 2014	Hours: 4.00

This provides a list of the hours spent by month for a particular volunteer, with a grand total at the bottom of the last page.

Click Continue to return to the Print tab of the Projects Menu.

Click Volunteer Hours Spent on Project.



This is a PDF report. The query asks for the project's key, status, and date began/ended. For data in this report to be meaningful, hours spent by volunteers on projects must first be recorded.

Project Num: 1 Date Began: 11/19/2012 Date Ended:

Title: Highway 89 Digital Collections Project

Description: This is an ongoing collaborative project between multiple Utah institutions working together to build an online digital exhibit documenting the history and various collections related to the historic Highway 89. Founding institutions include the Utah State Archives, Utah State University, Brigham Young University Special Collections, Southern Utah University, Salt Lake County Archives, and Northern Arizona University.

Hours Worked:
Cole, Shannon

Aldrich, Carl

Richardson, Jana

-- Volunteer hours on project Totals -->
.00

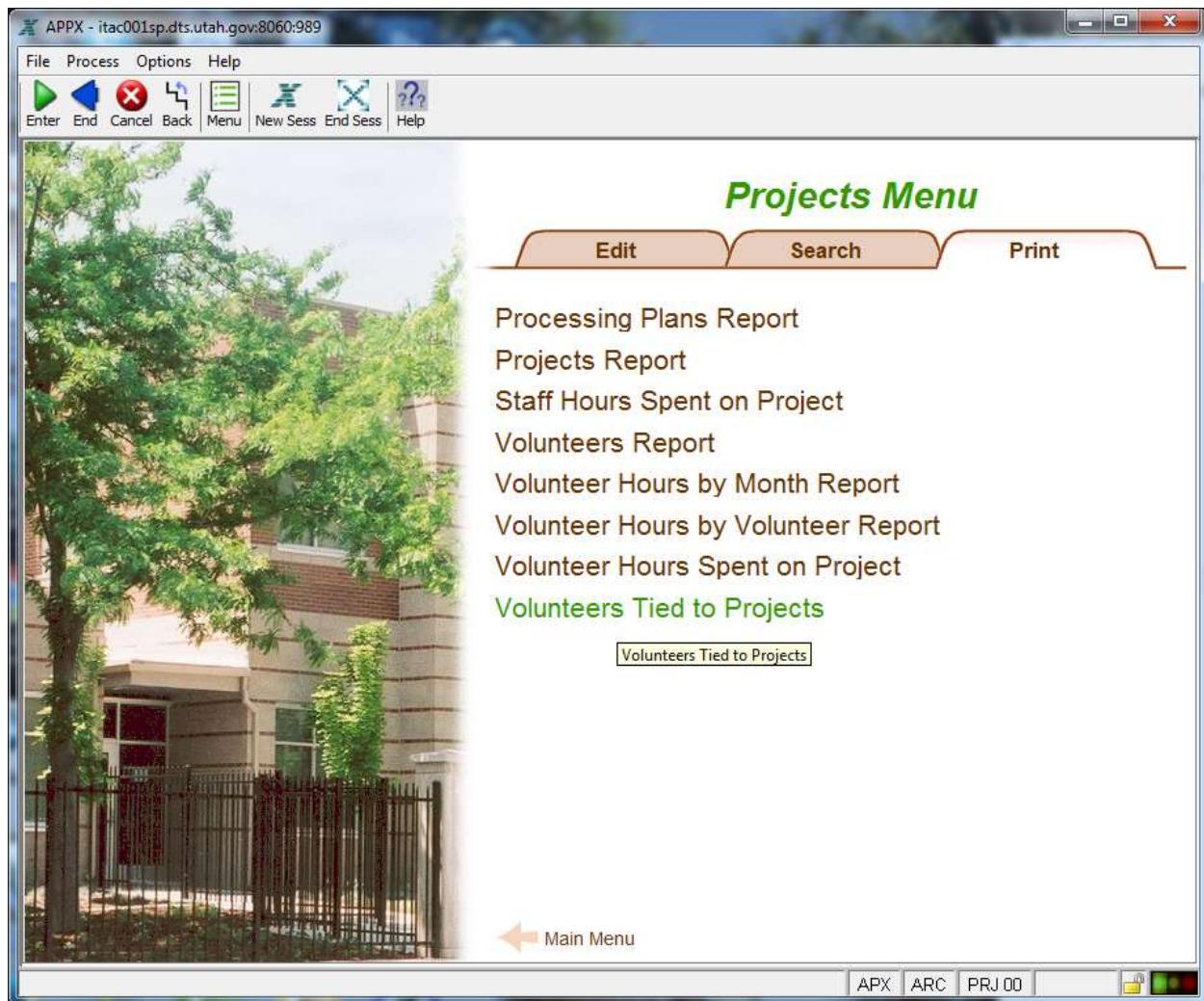
-- Volunteer hours on project Totals -->
.00

-- Volunteer hours on project Totals -->
.00

Sign and share this in the Document Cloud (optional)

Click Continue to return to the Print tab of the Projects Menu.

Click on Volunteers Tied to Projects.



This is a PDF report. The query asks for the initials of the volunteer's supervisor, or name of the volunteer.

APPX - itac001sp.dts.utah.gov:8060:989

File Options Help

Enter End Cancel Back | New Edit View Delete Ack Del Go To Chg Key Set Attr Menu | Next Rec Redisplay New Sess End Sess

Query Selection

?

Seq	Field Name	Occ	Field Name or Constant	Occ
1	Volunteer Supervisor	EQ	<input type="text"/>	EQ = Equal To GE = Greater Than or Equal To GT = Greater Than LE = Less Than or Equal To LT = Less Than NE = Not Equal To IN = Includes EX = Excludes RI = Regular Expression Case Insensitive RS = Regular Expression Case Sensitive
2	Name Last	EQ	<input type="text"/>	
3	Name First	EQ	<input type="text"/>	
4	Name Middle	EQ	<input type="text"/>	
5	Current	EQ	<input checked="" type="checkbox"/>	

<- If it says "more", press Page Down

Selection Expression Value/Blank Copy OK Cancel

APX ARC LIB 00 Add

File Edit View Insert Tools Help 081600001470294... #

Home Tools 081600001470294...

Utah State Archives Volunteer Summary

Current volunteers as of: June 9, 2016

Supervisor Name:	JEK Kichas, James	
Volunteer:	Besendorfer, Shanna	Intern/class credit
Project:	Court Indexes Transcription	
Project Leader:	GMS	
Tasks:	Prepared Mugshot Books w/ Photos for Enhanced Preservation Digitization of Mugshot Photographs Capture Metadata Elements from Mugshot Books for Index	
Volunteer:	Martinez, Luis	Intern/class credit
Volunteer:	Wassmer, Mike	Professional/needs job

Save & Close

Export PDF

Jobline Export PDF

Convert PDF File to Word or Excel Online

Selected PDF File: 081600001470294...

Document to: Microsoft Word (Normal)

Document Language: English (U.S.) - Change

Save

Create PDF

Edit PDF

Comment

Convert File

Fill & Sign

Send for Signature

Send by Email

Show and download in the Document Cloud

Click Continue to return to the Print tab of the Projects Menu.