ARCHIVISTS' TOOLKIT WORKSHOP

March 13, 2008 Christine de Catanzaro Jody Thompson

Agenda

- Brief overview of Archivists' Toolkit
- Names and Subjects module & exercise
- Accession module & exercise
- Resources module & exercises
- Exporting EAD/MARC
- Questions

ARCHIVISTS' TOOLKIT WORKSHOP

Names and Subjects Modules

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NAMES AND SUBJECTS – Chapter 11 (AT MANUAL)

- The "NAMES" and "SUBJECTS" modules provide:
 - A tool for recording persons, families, and corporate bodies associated with accessions or collections
 - A means to track the relationships between archival materials and all above entities
 - A way to manage name and subject authorities

NAMES MODULE - STANDARDS

- Designed to conform with ISAAR(CPF)
- Designed to support the emerging standard EAC (Encoded Archival Context)
- Allows formulation of names using AACR2, DACS rules

TECH PRACTICES FOR NAMES AND SUBJECTS

- Authorities in use:
 - LC name authority file, subject headings (LCNAF, LCSH)
 - Art and Architecture Thesaurus (AAT)
 - Digital Library of Georgia Name Authority Database (DLG)
 - Union List of Artists Names (ULAN)
 - Local Sources (using DACS rules)

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ELEMENTS REQUIRED FOR A NAME RECORD IN AT

- Name type (person, corporate body, family)
- Source or rules (at least one must be present)
- Sort name (if create sort name automatically is checked, this will be done)
- Primary name (for personal or corporate names); Family name (for a family)

NAMES MODULE – View All

- Click on "Names" on left sign of screen
- Click on "List All" icon at top of screen

Brooks, Christopher T.

Cane, Lawrence.

Chaikin, George.

Chesler, Phyllis

Chesnut, James

Coates, Vary T.

Colodny, Robert.

Cook, Edwin A.

Cogswell, Theodore.

Burroughs, John, 1837-1921

Carter, Edward A., --d. 1963.

Chesnut, James, General.

Cook, Edwin A. -- Archives

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Acker, Sylvia Boehm.	Person	ingest				
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Amery, Alfred	Person	ingest				
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Ball, Wilbur Allen, Dr., 1, President, 1928-	Person	Local Sources	Describing Archives: A Co			
Bazalgette, Leon	Person	Library of Congress Name Authority File	Describing Archives: A Co			
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Bellamy, Miles	Person	ingest				
Bellamy, Richard	Person	ingest				
Bessie, Alvah Cecil, 1904-	Person	ingest				
Birkby, Phyllis	Person	ingest				
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Blaine, Nell, 1922-	Person	ingest				
Blouet, Paul, 1848-1903	Person	ingest				
Boller, Robert	Person	Local Sources				
Bourdon, David	Person	ingest				
Bourdon, David Archives	Person	ingest				
Bradbury, E.E.	Person	ingest				
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Person

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EXERCISE 1

Creating a Basic NAME Record

EXERCISE 1 – INSTRUCTIONS (1)

- Enter the creator listed in your finding aid OR
- Enter your own name
- Make sure the "Names" module is highlighted (icons on the left)
- Click on "New Record" (top of screen)

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Person	
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EXERCISE 1 – INSTRUCTIONS (2)

- Select the appropriate name: Person, Corporate Body, or Family
- Click "OK"

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EXERCISE 1 – INSTRUCTIONS (3)

- Enter Primary name (for personal or corporate names); Family name (for a family) and Rest of Name (if needed)
- Enter Source (select from drop-down menu choose "Local Sources")
- Enter **Rules** (optional)
- Make sure Create Sort Name Automatically is checked
- Go to INSTRUCTIONS (OPTIONAL) or go directly to COMPLETION



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EXERCISE 1 – INSTRUCTIONS (OPTIONAL)

- Click on "Non-Preferred Names" tab
- Click on "Add Non-Preferred Names"
- Enter another version of your name/creator's name that is not the authorized version
- Click OK

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EXERCISE 1 – INSTRUCTIONS (OPTIONAL)

- Click on "Contact Info" tab
- Enter some minimal contact information

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EXERCISE 1 - COMPLETION

- IF YOU USED A CREATOR'S NAME, click "OK." This action will save your data.
- IF YOU USED YOUR OWN NAME, click "CANCEL." Your data will not be saved.

CUSTOMIZATIONS – NAMES MODULE (Chapter 15 of AT)

- Change the fields in the display screen
- Make additions/revisions to the drop-down menu
 - E.g., add a Name Source (Tech customized by adding DLG)
- You can also merge records
 E.g., "Dodd, Jim" and "Dodd, James B."

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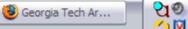


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Accession Module

Introduction

Creating a Basic Accession Record

- Click on Accession module
- Click on New Record
- Work on Basic Information Tab first
- Enter required fields:
 - Accession number
 - Accession date

- Enter other fields on Basic Information Tab
 - Title
 - Extent
 - Double check repository
 - Date expression
 - Locations

- Enter fields on Accession Notes tab
 - Acquisition type
 - Description
 - Disposition note

- Enter fields on Names & Subjects tab
 - Click on Add Name Link
 - Use filter function to search for name on Name Look up list
 - Click on appropriate name
 - Click on "OK" message and enter appropriate function: creator, source or subject
 - Double click on appropriate name
 - Close window

 Create donor contact information

 See Exercise 1-Creating a Basic Name Record

- Enter fields on Acknowledgements, Restrictions & Processing Tasks tab
 - Acknowledgements & Restrictions information
 - Check boxes and enter dates for paperwork
 - Note restrictions or access issues

- Enter fields on Acknowledgements, Restrictions & Processing Tasks tab
 - Processing Task information
 - Mark processing priority and processor(s)
 - Enter information about processing plan
 - Enter processing start date and status
 - Click OK to save record

ARCHIVISTS' TOOLKIT WORKSHOP

Resources Module (1)

ADVANTAGES OF AT FOR DESCRIBING ARCHIVAL MATERIALS

- A tool for writing finding aids (descriptions of archival resources)
- A way to export valid EAD and MARC records (in XML encoding)
- (See Chapter 9 of User Manual)
- A means to import existing EAD or MARC records (in XML encoding) (Chapter 6)

RESOURCES MODULE -STANDARDS

- Designed to conform to the new EAD Schema
- Creates valid EAD documents (if you're using the EAD DTD)
- Allows and encourages compliance with DACS rules
- Permits compliance with RLG BPGs (mostly)

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		Conditions Governing Use note		Restrictions: Use		Permission to publish materials from this o	
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		Series
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	Author	Revision Date
	Christine de Catanzaro	Revision Description
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DESCRIBING ARCHIVAL MATERIALS

Basic Description

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CREATING A BASIC RESOURCE RECORD IN AT – REQUIRED FIELDS

- Level
- Unique Resource Identifier
- Title
- Date Expression (and/or Begin Date, End Date)
- Extent Number and Extent Measurement
- Language Code

EXERCISE 3a

Creating a Basic Resource Record

EXERCISE 3a: INSTRUCTIONS (1)

- From the Main Screen, select "Resources"
- Click on the "New Record" icon at the top of the screen
- A blank Resource record should appear

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EXERCISE 3a – INSTRUCTIONS (2)

- 1. Select a **Level** from the drop-down menu for the record (in most cases, your level will be "Collection").
- 2. Enter a unique **Resource Identifier** (usually a manuscript number).
- 3. Enter a **Title**.
- 4. Enter a **Date Expression** and/or **Begin Date** and **End Date** for the materials.
- 5. Enter the **Extent Number** and **Extent Measurement** (cubic feet, linear feet etc. from the drop-down menu).
- 6. Select the Language Code for the language of the materials (in most cases, this will be "English (eng)".

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EXERCISE 3a – INSTRUCTIONS (3)

Click "OK"

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EXERCISE 3a (completion)

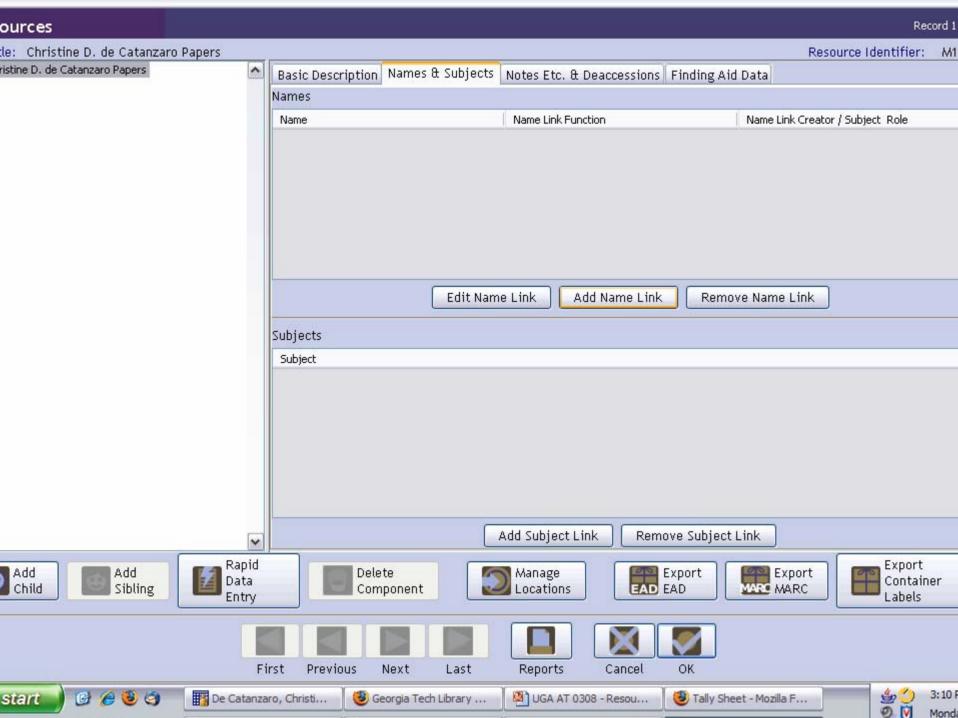
- Click "OK" to save your work
- Your collection should now appear in the List of Resources on your screen
- Double click on your record to open it back up

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DESCRIBING ARCHIVAL MATERIALS – COLLECTION LEVEL

Names and Subjects



EXERCISE 3b

Adding a Creator to Resources -Names and Subjects

EXERCISE 3b – INSTRUCTIONS (1)

- Make sure you are in the "Resources" module, in the Resource record you've just created
- Click on "Names and Subjects" tab
- Click on "Add Name Link" button on the top half of your screen
- A "Name Lookup" list should appear
- Use the filter to type the first few letters of the Primary Name of your creator

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EXERCISE 3b – INSTRUCTIONS (2)

- Select the name of the creator
- IMPORTANT: At the bottom left of your screen, select the correct function from the drop-down menu (function is **Creator**)
- When a function is selected, you may OPTIONALLY assign a role to the Creator

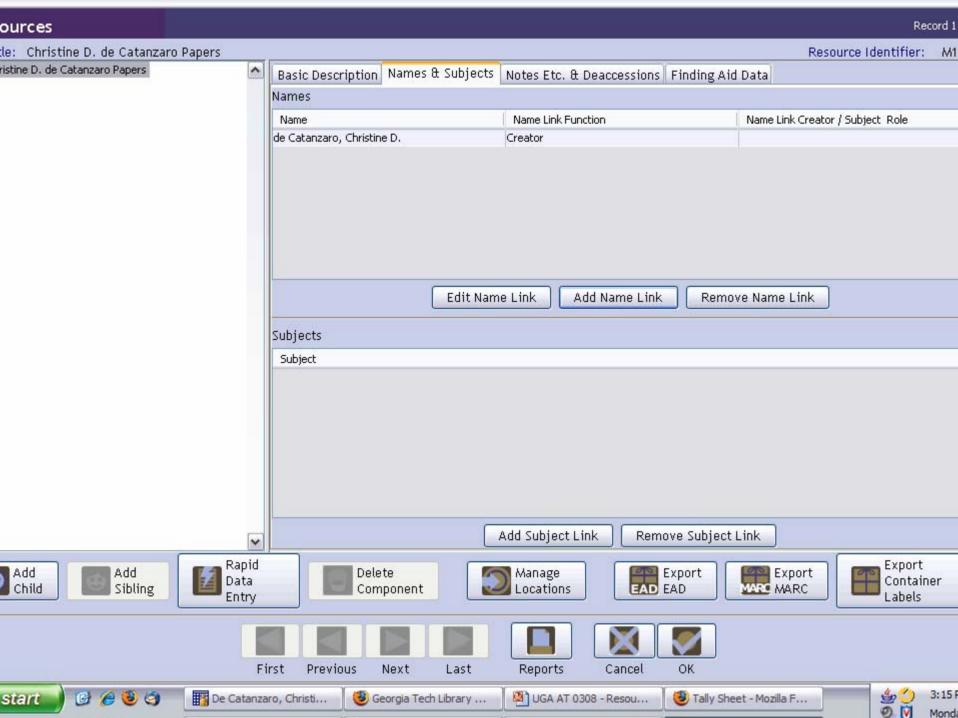
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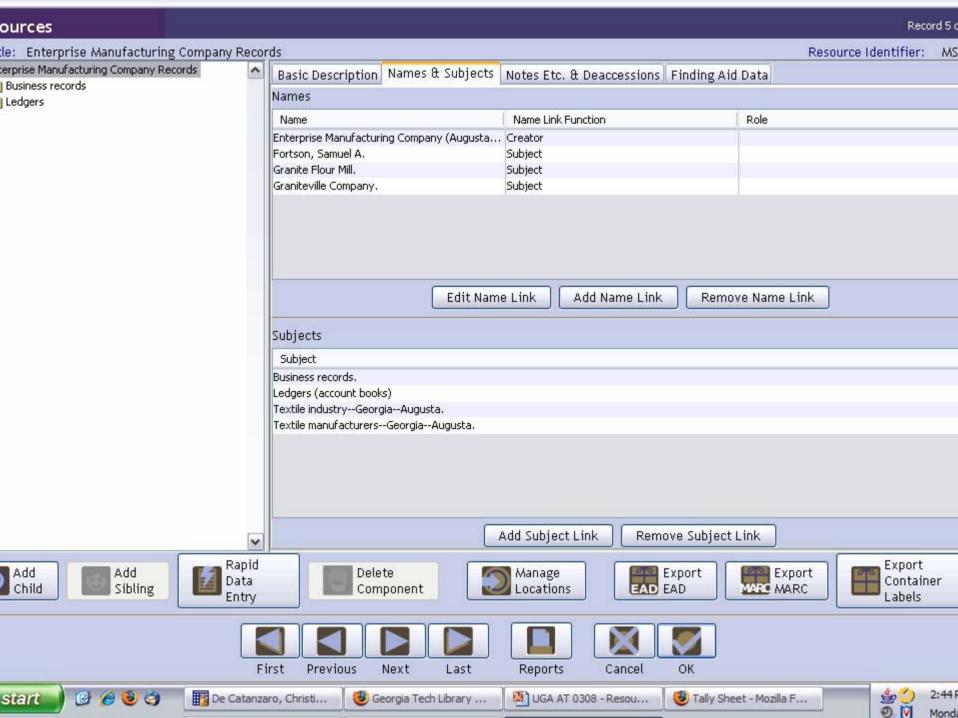
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EXERCISE 3b – INSTRUCTIONS (3)

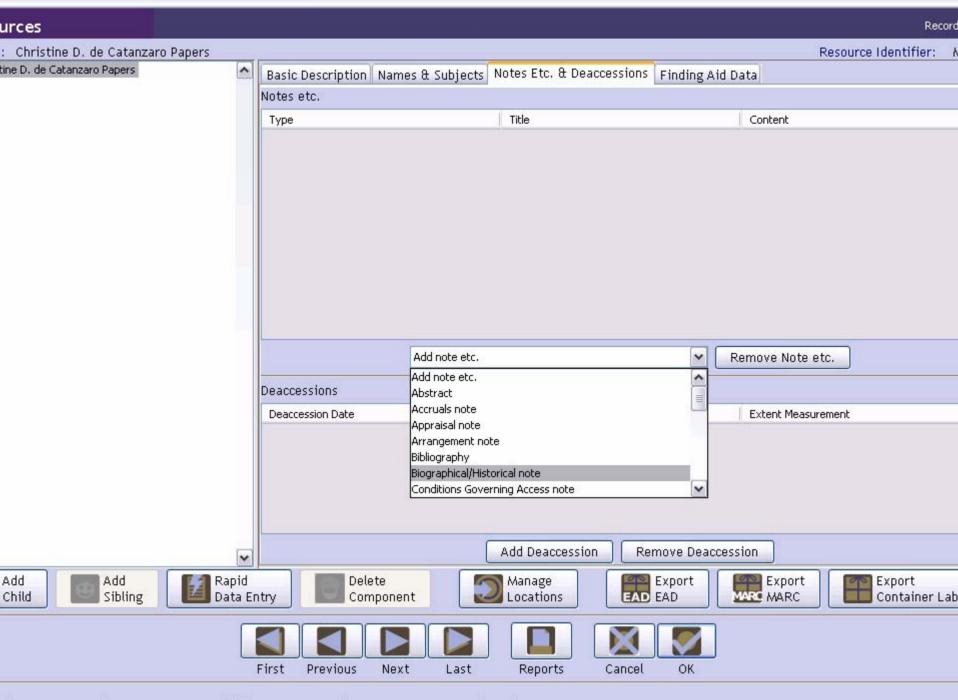
- Click on "Link" button
- Click "Close Window"
- You should see the Creator name appear in the Names section (the top half) of the screen



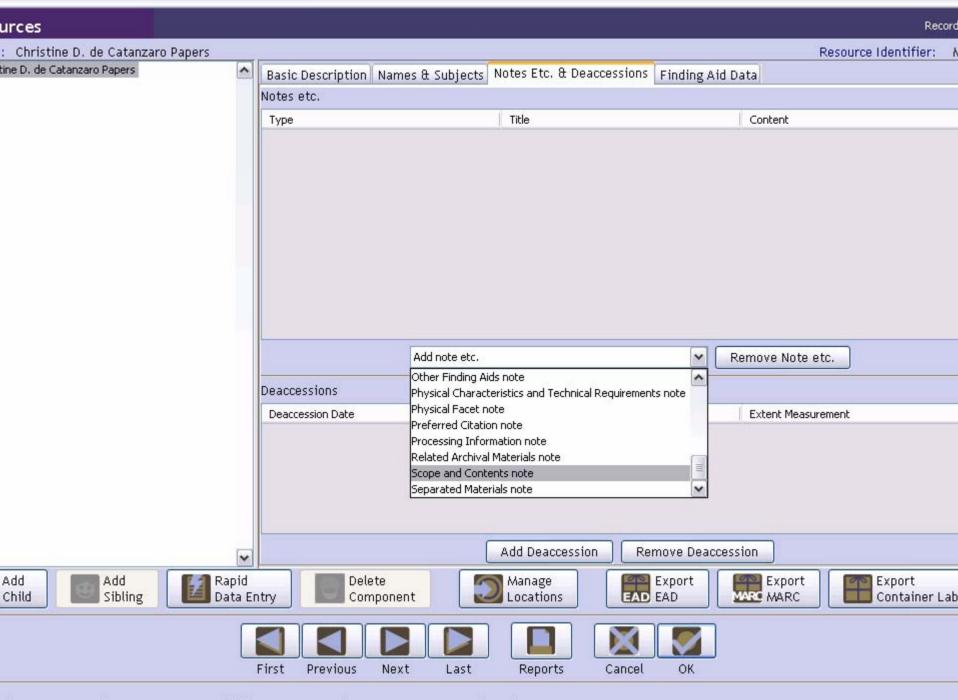


DESCRIBING ARCHIVAL MATERIALS – COLLECTION LEVEL

"Notes etc & Deaccessions" Tab



d: Mar 10, 2008 by repmanager | Modified: Mar 10, 2008 by repmanager | Record Number: 44



d: Mar 10, 2008 by repmanager | Modified: Mar 10, 2008 by repmanager | Record Number: 44

EXERCISE 4a – INSTRUCTIONS

- Select Conditions Governing Access from the drop-down menu
- A new screen should appear with the note type **Conditions Governing Access** note
- Enter your title for this note (many repositories use **Restrictions on Access**)
- Enter any restrictions listed in your finding aid. If there are none (or none are indicated in your finding aid), type "No restrictions."
- Click "OK."

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EXERCISE 4b - INSTRUCTIONS

- Select Processing Information from the drop-down menu
- A new screen should appear with the note type **Processing Information** note
- Enter your title for this note (many repositories use **Processing Information**)
- Enter the processing information listed in your finding aid (if any).
- Click "OK."

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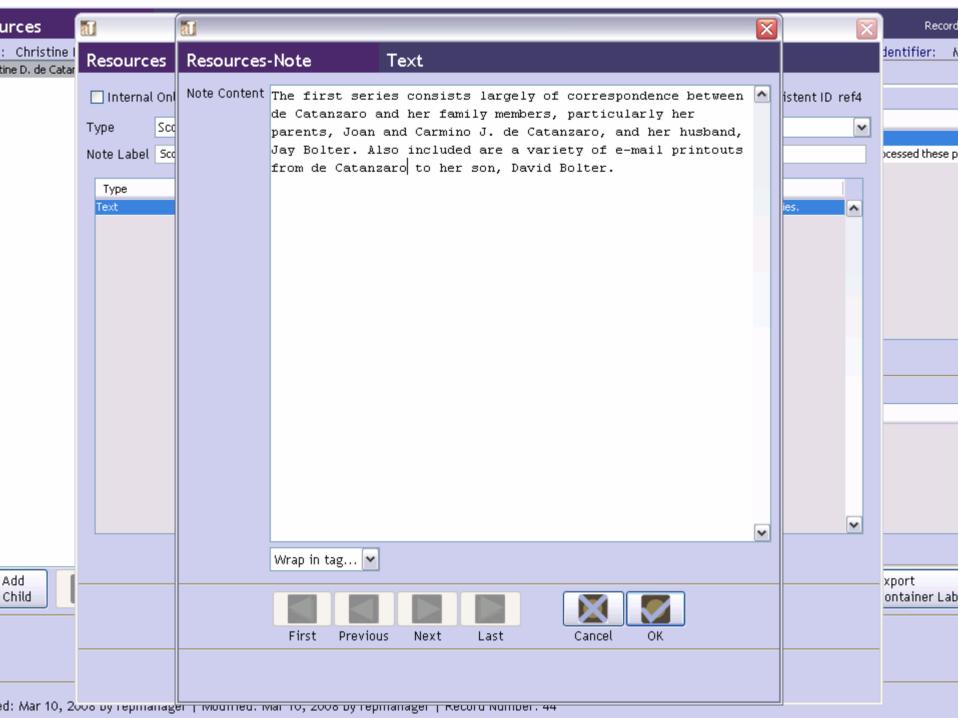
EXERCISE 4c – INSTRUCTIONS (1)

- Select Scope and Contents from the drop-down menu
- A new screen should appear with the note type Scope and Contents note
- In the check box at the top of your screen, select Multi-part.
- In the "Add part" drop-down menu on the bottom of the screen, select **Text.**

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EXERCISE 4c – INSTRUCTIONS (2)

- A new text screen will appear. Enter the first paragraph of the "Scope and Contents" text in your finding aid.
- Click "OK."
- Select "Text" from the "Add part" dropdown menu and add a second paragraph.
- Click "OK."
- Your paragraphs should be listed in order on your screen.



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Corresponden Sheet music		l Only 🔽 Multi-part					Persistent ID r	ef4		
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EXERCISE 4c – INSTRUCTIONS (Completion)

- Click "OK."
- If you have completed Exercises 4a through 4c, your "Notes" list should have "Conditions Governing Access," "Processing Information," and "Scope and Contents."

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DESCRIBING ARCHIVAL MATERIALS – COLLECTION LEVEL

"Finding Aid Data" Tab

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tine D. de Catanzaro Papers		Basic Description Names	& Subjects Notes Etc. & D	eaccessio	ons Finding Aid Data		
		EAD FA Unique Identifier	M1000.xml		Sponsor Note		
		EAD FA Location					
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		Inventory of the Christine	D. de Catanzaro Papers	~			
					Edition Statement		
				~			
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					Series		
		Finding Aid Date			-		
		Author			Revision Date		
					Revision Description		
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		Describing Archives:arc	d (dacs) 💌		Finding Aid Status		
		Language of Finding Aid			Finding Aid Note		
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		First Previous Next	Last Reports	Canc	el OK		

d: Mar 10, 2008 by repmanager | Modified: Mar 10, 2008 by repmanager | Record Number: 44

COLLECTION LEVEL - Completion

- Enter data in selected fields on the "Finding Aids Data" screen.
- At the bottom right of your screen, click "OK."

ARCHIVISTS' TOOLKIT WORKSHOP

Resources Module (2)

WORKING AT THE COMPONENT LEVEL

- Collections can be divided into series, subseries, files, items etc.
- AT allows description of each of these levels and offers the possibility of very detailed description
- AT uses the "Child" and "Sibling" metaphors to add components to a finding aid

EXERCISE 5a

Adding Child/Sibling Components

EXERCISE 5a – INSTRUCTIONS (1)

- Open the Collection Level description that you created in Exercises 3 and 4
- On the left side of the screen, click on the collection title
- NB: You are at the **Collection** level
- At the bottom left of your screen, click on the "Add Child" icon
- A new screen will appear with 3 tabs at the top

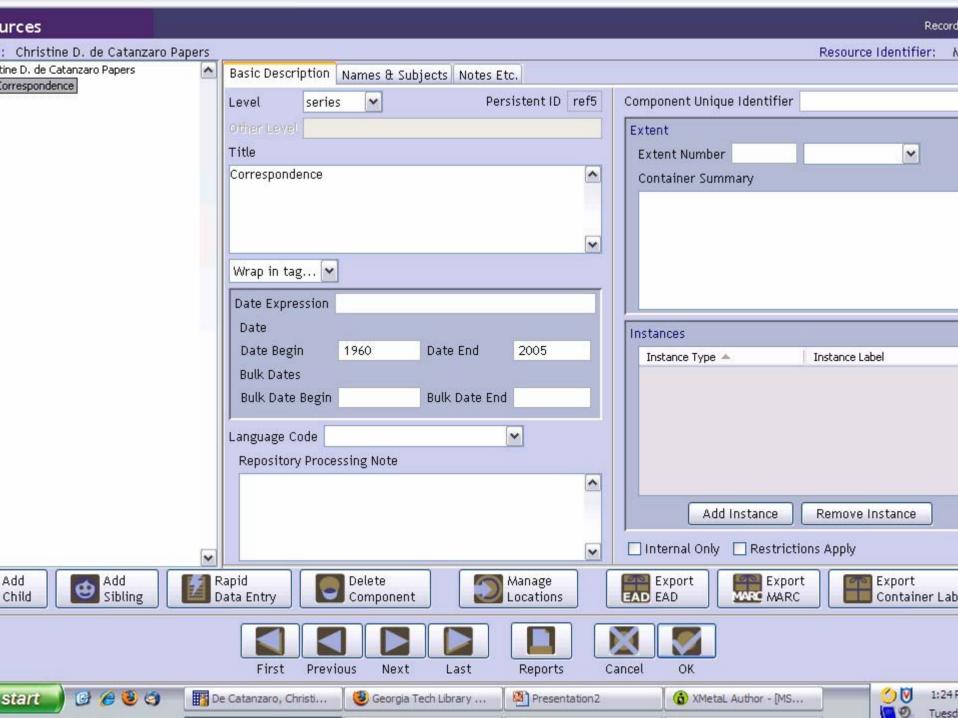
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	Other Level	Accessions linked to this Resource ID:						
	Title	Accession Number 🔺 Accession Title						
	Christine D. de Catanzaro Papers							
	Wrap in tag 💌	Extent						
	Date Expression	Extent Number 2.5 linear ft. 💌						
	Inclusive Dates	Container Summary						
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	Language English (eng)	Instance Type 🔺 Instance Label						
	Repository Processing Note							
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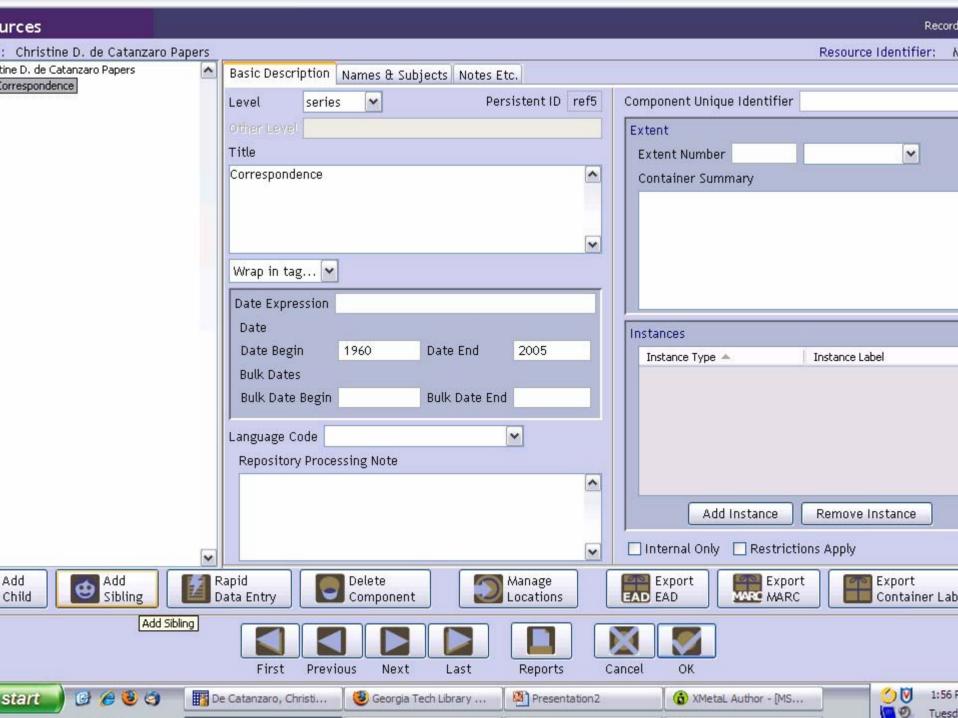
EXERCISE 5a – INSTRUCTIONS (2)

- Select a Level from the drop-down menu for the record. (Your level will probably be: Series, File, or Item, depending on your collection.)
- Enter a **Title** for the component (Series Title/File Title, Item Title).
- Enter either a Date Expression or a Begin Date and End Date.



EXERCISE 5a – INSTRUCTIONS (3)

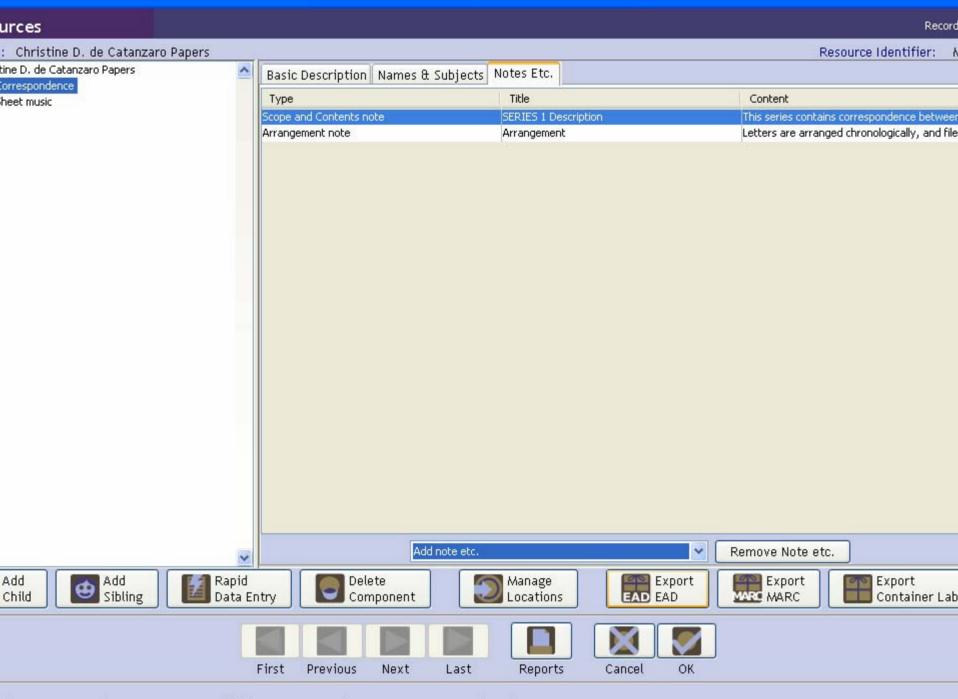
- Enter a second component (either a second series, file, or item) at the same level as the first component:
 - On the left side of the screen, click on the title of the first series, file, or item. Make sure it is highlighted
 - Click on the "Add Sibling" icon



EXERCISE 5a – INSTRUCTIONS (4)

- For the second component level:
 - Select a Level for the record
 - Enter a **Title**
 - Enter a Date Expression or a Begin Date and End Date

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: Christine D. de Catanzaro Papers		Resource Identifier: A							
ine D. de Catanzaro Papers	Basic Description Names & Subjects Notes Etc.								
orrespondence	Level series 💌 Persistent ID ref6 Component Unique Ide	entifier							
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	First Previous Next Last Reports Cancel OK								



EXERCISE 5a – INSTRUCTIONS (5)

Click "OK"

EXERCISE 5b – INSTRUCTIONS (1)

- Add a Child record to one of the components:
 - On the left side of the screen, click on the component you want to select
 - Click on the "Add Child" button
 - A new screen should appear for you to enter the Level, Title, and Date Expression/Begin and End Date

urces Record Resource Identifier: M Christine D. de Catanzaro Papers tine D. de Catanzaro Papers Basic Description Names & Subjects Notes Etc. orrespondence file v Persistent ID ref7 Component Unique Identifier Level heet music Extent Title v Extent Number Correspondence - Carmino J. de Catanzaro ~ Container Summary v Wrap in tag... 💙 Date Expression Date Instances 1983 Date Begin 1960 Date End Instance Type 🔺 Instance Label Bulk Dates Bulk Date End Bulk Date Begin Language Code ¥ **Repository Processing Note** ^ Add Instance Remove Instance 📃 Internal Only Restrictions Apply × Add Add Rapid Delete Manage Export Export E Export EAD EAD 5 ۲ Sibling Child Data Entry Component Locations MARC MARC Container Lab

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Previous

Next

Last

Reports

Cancel

OK.

First

EXERCISE 5b – INSTRUCTIONS (2)

- Adding an instance
 - The file created on the previous slide is in a folder numbered Box 1, folder 1
 - To record this information click the "Add Instance" button (at right of screen, toward the bottom)
 - A screen will appear asking what type of instance you want to create
 - For a folder, select "Mixed materials"

urces

: Christine D. de Catanzaro A	apers	6						Resource Identifier:
tine D. de Catanzaro Papers Correspondence	^	Basic Descri	iption Name	s & Subjects	Notes Etc.			
•		Level	file	/	Persistent ID	ref7	Component Unique Identifier	
heet music		Other Level					Extent	10
		Title					Extent Number	~
		Corresponde	ence - Carmi	no J. de Catar	nzaro	^	Container Summary	
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EXERCISE 5b – INSTRUCTIONS (3)

- A new screen will appear
- Enter box/folder information on this screen
- Click "OK"

urces

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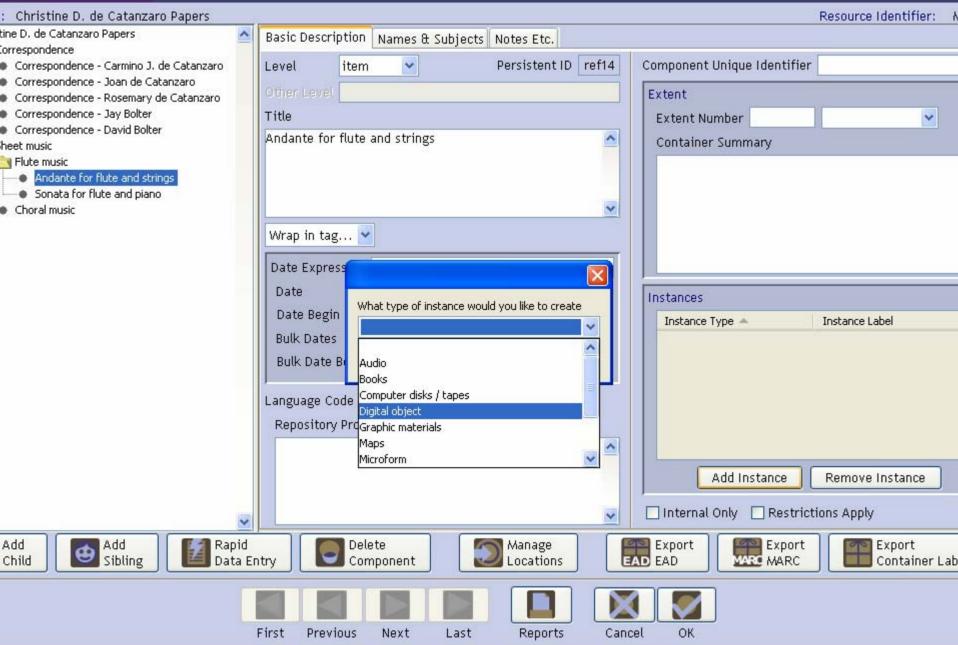
OK

First

EXERCISE 5c – INSTRUCTIONS (1)

- Adding a digital object
 - Click the "Add Instance" button at the right toward the bottom of the screen
 - A screen will appear asking what type of instance you want to create
 - For a digital object, select "Digital object"

urces



EXERCISE 5c – INSTRUCTIONS (2)

- A new screen will appear on which you can record the data you need for your export
- Note that you can export METS and MODS for digital object records

esources	Digital Object		
ource Title: Christine D. de C			urce ID: M1
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OTHER FEATURES OF AT RESOURCE MODULE

- Rapid data entry is available to enter all data, including Box/folder information, on one screen
- A "Delete Component" button is available
- Managing locations is also available from the Resource Module

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	Component Unique	e Identifier	
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	Note 2	▼	
	Note 3		
	Instance Type		
	Container 1 Type	🖌 Container 1 Numeric Indicator	
Add Child	Container 2 Type	Container 2 Numeric Indicator Container 2 Alphanumeric Indicator	
	Container Barcode		
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QUESTIONS?

Jody Thompson (jody.thompson@library.gatech.edu)

> Christine de Catanzaro (decatanzaro@gatech.edu)

THANK YOU FOR COMING!

Jody Thompson (jody.thompson@library.gatech.edu)

> Christine de Catanzaro (decatanzaro@gatech.edu)