

**The Archivists' Toolkit: Testing and Implementation at Georgia Tech**  
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The Georgia Tech Archives has been busy testing and implementing the Archivists' Toolkit, an open source application that supports management and description of archival collections. The Toolkit, according to official website at <http://www.archiviststoolkit.org>, is "the first open source archival data management system to provide integrated support for accessioning, description, donor tracking, name and subject authority work, and location management for archival materials." The Archivists' Toolkit is funded by a Mellon Foundation grant and was designed and created by a team of programmers and archivists from the University of California San Diego Libraries, New York University Libraries, and the Five Colleges Libraries. The project was developed and implemented in 2004 and was ready for beta testing in the summer of 2006.

Nineteen institutions, including Harvard University, the Brooklyn Museum, Nationaal Archief of the Netherlands, and Georgia Tech participated in the beta testing in the summer of 2006. During the testing, the institutions were given weekly assignments. Participants were asked to test all functions of the application, such as the creation of accession records with names and subjects, and the ingest and export of Encoded Archival Description (EAD). Their input helped shape the Toolkit into a refined tool for managing archives, developed by and for archivists. The community of institutions using, testing, and designing the Toolkit has grown by leaps and bounds since the initial beta testing, and has developed into a valuable resource for technical support. The Toolkit design team impressively responds in a timely manner to all questions and comments submitted to the Archivists' Toolkit User Group's listserv.

The Toolkit consists of two main modules: an accessions module for tracking accession records and inventory management, and a "resources" module for arrangement and description of processed collections. In addition, the Toolkit provides support for name and subject authority records, user management, and general repository information. It can export EAD, 2002, MARC XML, METS, MODS, and Dublin Core records and includes a variety of reporting options.

## **Accessions Module**

A common problem among archives, whether they are run by a lone arranger at a church archives or a large staff at a research institution, is the lack of a consistent method to track accessions. Left to figure out their own inventory management systems, many archives have yet to experience full advantage of an authority-controlled, standardized accessions database. The Archivists' Toolkit includes an accessions module that provides archives, large or small, a convenient and effective software solution for managing the accessions in their repository.

The Toolkit's accessions module offers support for managing the entire archival workflow, from the first acquisition through to final processing. The standard "out of

the box" configuration of the Archivists' Toolkit contains a basic metadata set for accession records, including name and subject authorities, rights and donor tracking, and shelf location. In addition, the fully customizable interface allows institutions to develop their own specific metadata to meet the specialized needs of their collections.

Importing legacy data is done via a batch import of a tab-delimited text file. Our accessions database at Georgia Tech consisted of a MySQL database and a PHP web interface, and it was easy to export all of our metadata into a file that could be manipulated with a spreadsheet editor such as Microsoft's Excel. The most time-consuming part of the import process was sorting through years of name records with no authority control. There will be fields that we will have to clean up by hand, but we lost no information in the transfer. We were aided in the import process by one of the application developers from the Systems Department, but we were able to set up a complete installation of the Toolkit, as well as import our records, on a laptop which we used for demonstrations without the aid of our IT personnel.

## **Resources Module**

In addition to the accessions module, the Archivists' Toolkit provides a straightforward way to create finding aids in its resources, or description, module. Processing archivists can easily maneuver between four sections to enter collection-level descriptive information. The "Basic Description" section provides fields for collection title, resource identifier, inclusive and bulk dates, and extent. Subject headings and corporate or personal names can be added or linked in the "Names and Subjects" section. The "Notes and Deaccessions" section allows entry of arrangement, biographical/historical note, scope and contents, restrictions, and other basic components of collection-level description. The fourth and final section, "Finding Aid Data," contains fields for metadata about the finding aid itself, such as unique identifier and location, processing date, and author of the finding aid.

Creating series, sub-series, and box/folder lists is similarly straightforward. The Toolkit uses the analogy of family generations with its child and sibling terminology to reflect the hierarchical nature of archival collections. At the collection level, for example, clicking on the "Add Child" button causes a new component screen to appear. Users can set the level to "series," "sub-series," "file," or "item," and enter the information appropriate to that level. Using the "Add Sibling" button allows for the creation of another component at the same level. For example, clicking on a series and selecting the "Add Sibling" button will cause a new series to appear. At all times, archivists can view the hierarchy of the collection at the left of the screen as they are creating it.

Perhaps the most anticipated feature of the Archivists' Toolkit is its ability to export EAD-encoded finding aids as well as MARC XML records with the push of a button. This feature is particularly beneficial for archives without the financial wherewithal and technical expertise to produce EAD or MARC from scratch. In addition, the Toolkit can

export METS, MODS, and Dublin Core records for the description of individual digital objects.

## **Other Features**

Other smaller but exceedingly useful features of the Archivists' Toolkit include source and donor tracking, rights management, and name and subject authority control. The Names and Subjects module enables even resource-strapped small archives to take advantage of an authority-controlled system. The Toolkit allows for on-the-fly entry of local name records, and includes detailed metadata for recording address and contact information for donors. In addition, the Toolkit is able to create several useful reports, including accession container lists, shelf listings, and restriction lists.

Another impressive feature of the Toolkit is the user management system. The Toolkit uses classes of user accounts, ranging from a super-user administration account to a beginning data entry staff account down to a read-only basic account. These classes allow student assistants to do some minimal data entry, without giving them full access to change everything in the description record. A read-only account can be used for reference desk staff, allowing them to reap the benefits of an integrated search of an Archives' holdings, without the danger of accidental losses of data.

At the time of writing this article, the staff at the Georgia Tech Archives are working with the Systems Department and the developers of the Toolkit to improve the EAD import function, to enable us to import 250 EAD finding aids without loss of data. We hope to be fully implementing the Toolkit at Tech when we have the EAD import and export function working smoothly. We have fully implemented the accession module, and believe that the benefits that it alone provides are worth the minor headaches that are caused when moving an entire operation to a new system.

Please contact the Georgia Tech Archives ([archives@library.gatech.edu](mailto:archives@library.gatech.edu) or 404-894-4579) for more information on using the Archivists' Toolkit.