Chapter 1

Introduction to the Archivists' Toolkit

The Archivists' Toolkit is an open source database application that supports description and management of archival materials, including accessioning, registering source information for archival resources, providing topical and name access points for subjects and creators of resources, tracking locations of archival resources, and producing finding aids, collection guides, METS digital objects, and various administrative reports. The Toolkit is customizable to local work settings, and can be implemented as a stand-alone desktop application, a multi-user networked application, or a multi-repository networked application.

Initial funding for the development of the Archivists' Toolkit was provided by The Andrew W. Mellon Foundation.

System requirements

These are the systems requirements for the client application, which runs the interface to the Toolkit database. For information about the system requirements for the Toolkit's MySQL database, see the database installation instructions, available at: http://www.archiviststoolkit.org/dbinstall.html, or the MySQL documentation at http://dev.mysql.com/doc/refman/5.0/en/mysql-cluster-multi-hardware-software-network.html and http://dev.mysql.com/doc/refman/5.0/en/faqs-mysql-cluster.html#qandaitem-26-10-7.

Minimum System Requirements

PC

- Operating System: Windows 2000 or Windows XP
- Java 5 JRE or JDK
- CPU: Pentium 3, 500Mhz
- System Memory (RAM): 128MB
- Hard Disk: 100MB free space
- Screen: 1024x768

Mac

- Operating System: Mac OS X 10.3.9
- Java 5 JRE or JDK
- CPU: G3 500Mhz
- System Memory (RAM): 256MB
- Hard Disk: 100MB free space
- Screen: 1024x768

Recommended System Requirements

PC

- Operating System: Windows XP
- Java 5 JRE or JDK
- CPU: Pentium 4 2.4GHz+ or AMD 2400xp+
- System Memory (RAM): 512MB
- Hard Disk: 100MB free space
- Screen: 1024x768

Mac

- Operating System: Mac OS X 10.4.5
- Java 5 JRE or JDK
- CPU: G4 1.2Ghz
- System Memory (RAM): 512MB
- Hard Disk: 100MB free space
- Screen: 1024x768

Overview of features

Features

- Recording accessions
- Tracking sources / donors
- Basic authority control for names and topical subjects
- Describing archival resources and digital objects
- Location management
- Ingesting legacy data in standardized formats (EAD, MARC XML) and non-standard formats (accessions data tab delimited form)
- User management functions
- Interface customizations
- Auditing of database records

Outputs

- EAD finding aid
- METS digital object
- MARC XML record
- MODS record
- Dublin Core record
- Cumulative List of Acquired Accessions
- Cataloged Accessions
- Accession Container List

- Accession Intellectual Property Status
- Cumulative List of Accessions Processed
- Accession Processing Plan
- Accession Production Report
- Accession Receipt
- Accession Record
- Cumulative List of Accessions with rights transferred
- Accession with linked names and subjects list
- Un-cataloged Accessions
- Cumulative List of Accessions Un-processed
- Location Shelf List/Locations to Resource and Accession Record Display
- Names List
- Accessions to Name List
- Resources to Name List
- Resources and Accessions to Name List
- Name Record
- Non-Preferred Names to Name List
- Finding Aid (Text)
- Resource List
- Resource Location List
- Resource Record
- Restrictions List
- List of Sources
- Creators
- Names and Subjects to Resource Display
- Source Names
- Resources to Subject Term Display/Repository Subject Guide
- Subject Record

The Archivists' Toolkit License

Archivists' ToolkitTM

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Using this manual

Using this manual

Intended audience

This user manual is designed for repository staff at all levels, from administrator to processing archivist to student or volunteer. In order to accommodate both archival novices and technological novices, the style of the manual is somewhat simple and direct. While the manual attempts to incorporate good practice and conventions, it is not a replacement for a repository's own processing manual, or for archival training.

The manual is designed to be a basic learning and reference device for all operations of the Toolkit. To the extent it is necessary, any troubleshooting support will be available through the Archivists' Toolkit web site (http://www.archiviststoolkit.org/).

Typographical conventions

Certain typographical conventions are used throughout the manual in order to improve readability and recognition of key components:

1. **Times New Roman 12pt** bold is used to identify all interface components, filenames, and field names.

2. `Courier New 12 pt` signifies data entry examples.

3. *Times New Roman 12 pt italic* is used for general emphasis.

4. Notes and tips are indented and set apart with a line above and below as follows:

   Note:

5. Cautions are indented and surrounded by a box:

   Caution

Screen shots

The screen shots in this manual reflect the application in its default installation state, i.e., before any customizations have taken place. All screen shots were captured on a computer running the Windows XP operating system. The operating system dictates some superficial differences in the basic features of the windows (e.g. the title bar, minimize and close buttons, etc.). Therefore, the screens in the manual may not look exactly like the screens for a MacOS X or Linux machine. The layout, headers, data elements, and buttons on the screens will, however, be easily recognizable and applicable across all operating systems.