

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 it can be implemented as a stand-alone desktop application, a multi-user networked application, or a multi-repository networked application.

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System requirements

Below are the system requirements for the client application, which runs the interface to the Toolkit database.

Minimum System Requirements for AT Client

PC

- Operating System: Windows 2000
- 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 (or higher)

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

Database Backends

To run the client it is necessary to install a database backend. Currently, the AT will fully support a MySQL 5.0, MS SQLServer 2005, or an Oracle 10g backend.

For information about the system requirements for the MySQL database backend, see the database installation instructions, available at: <http://www.archiviststoolkit.org/InstallGuidelines.pdf>, 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>.

For Microsoft SQL Server installation, see <http://www.microsoft.com/sql>.

For Oracle installation, see <http://www.oracle.com/database>.

Overview of features

Features

- Recording accessions
- Tracking sources / donors
- Controlling basic authorities for names and subjects
- Describing archival resources and digital objects
- Managing locations
- Importing legacy data in standardized formats (MARCXML and EAD, including batch import for EAD files) and non-standard formats (accessions XML or tab-delimited data files)
- Interface customizations
- Support for MySQL, MS SQLServer, and Oracle backends

Output

- EAD finding aid, including batch output

- METS digital object
- MARC XML record, including batch output
- MODS record
- Dublin Core record
- Accession record(s)
- Accession receipt
- Accession production report
- Accessions acquired
- Accessions cataloged
- Accessions not cataloged
- Accession intellectual property status
- Accessions with rights transferred
- Accessions processed
- Accessions unprocessed
- Accession inventory
- Accession processing plan
- Accessions with deaccessions
- Accessions with linked names and subjects list
- Location shelf list/locations with resource or accession record(s)
- Name record(s)
- Names list
- Names with accession(s)
- Names with resource(s)
- Names with resource(s) and accession(s)
- Names with non-preferred names
- Resource record(s)
- Resources list
- Resource(s) restricted
- Resources with name(s) linked as creator
- Resource(s) with name(s) linked as source
- Resource(s) with names linked as subjects and with subjects
- Resource(s) with location(s)
- Resources with deaccession(s)
- Subject record(s)
- Subject(s) with linked accession(s) and resource(s)
- Repository Profile Report
- Locally-created Jasper Reports

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Archivists' Toolkit™

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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 aims at being somewhat simple and direct. While the manual attempts to incorporate good practice and conventions, it is by no means 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 Archivists' Toolkit™. To the extent it is necessary, any troubleshooting support is available through the 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 bold 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 include exclamation symbol and are 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 screen shots may not look exactly like the screens for Mac OS X or Linux machines. The layout, headers, data elements, and buttons will, however, be easily recognizable and applicable across all operating systems.