

Chapter 14

Generating Outputs

Overview

The Toolkit produces two distinct types of outputs: reports and exports. Reports include both administrative and descriptive products, such as lists of acquisitions for a given time period or a collections guide. Exports are typically, but not exclusively, XML files conforming to standards such as EAD, METS, and MARC.

A complete list of reports, along with their description and a sample of each report, is available in the appendices.

Generating reports

Overview

The Toolkit allows you to print an individual screen or record, to generate a report containing data from all records, or to produce a report that draws upon data in only a subset of records. When generating reports for multiple records, the output reflects the order and result set displayed in the list screen for a specific functional area.

Reports can be generated from list screens, using the  button or from individual records

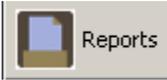
 using the  button. Using the **Reports** button from the list screen allows for the creation of reports from a group of records, while generating reports from an individual record produces a report for only that single record. The **Reports** drop-down list in the menu / command zone provides the option to generate a repository profile; this will be discussed later in this chapter.

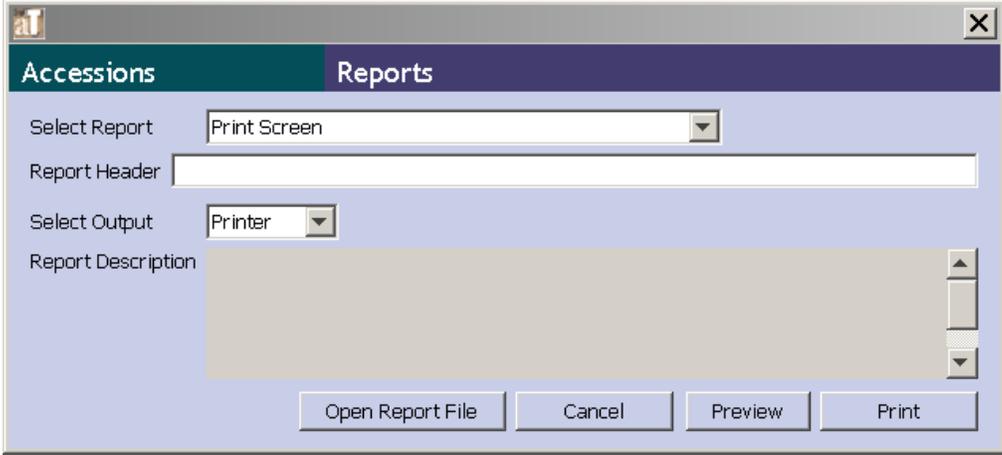
You may print, preview, or create a file of the report. To preview a file, the **Select Output** field must be set to “Printer.” File options are: PDF, HTML, RTF, Excel, or CSV. Each version differs in its usefulness. Currently the PDF, RTF, and HTML options produce the most ready-to-use reports. The RTF option is useful for bringing the report information into MS Word for editing. The Excel format is helpful for manipulating the report in Excel. For tabular reports, such as Print Screen, the CSV option is useful to extract delimited data. For exporting finding aids, only HTML is available.

Generating a list screen

You may print the contents of any list screen. When printing list screens, the output will match the content, order, and sorting of elements found on the screen.

To print a list screen:

1. From any list screen, press the  button.



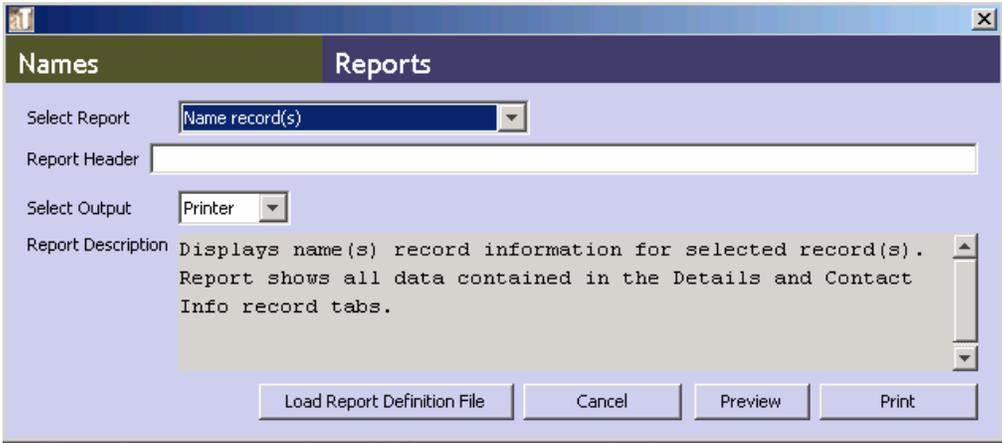
2. Select **Print Screen** in the **Select Report** drop-down list.
3. Enter any text you wish to appear in the **Report Header**.
4. **Select Output** for the report. Options are: Printer, PDF, HTML, RTF, Excel, or CSV.
5. Press the  button to print or the  button to preview the file.

Generating reports for a single record

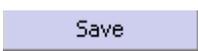
You may print the contents of any individual record by pressing the  button.

To generate a report for a single record:

1. From any record press the **Reports** button.



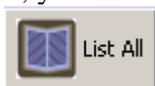
2. Select the type of report desired. For example, to print a name record, select **Name Record(s)**.

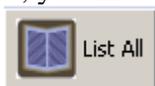
3. Enter any text you wish to appear in the **Report Header**.
4. **Select Output** for the report. Options are: Printer, PDF, HTML, RTF, Excel, or CSV.
5. Press the , , or  button depending on the desired output.

Generating reports for multiple records

Overview

Any report can be generated for a record set of more than one record. To print a formatted report containing data from multiple records, you must first create the list of records to be output into the

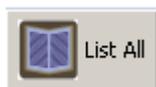


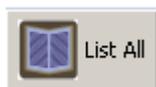
report. You can do this by using the  button to generate a report of all records of a given type. Or, you can generate a report for multiple records by using the filter or search options to create a subset. For example, using the search tool, a list of accession records can be generated for all records with an accession date between January 1, 2006 and December 31, 2006 in order to generate a report calculating the year's acquisitions.

The list screen and search editor can be customized using the configuration tools if necessary to provide the desired search and sort options. See Chapter 15 for customization instructions.

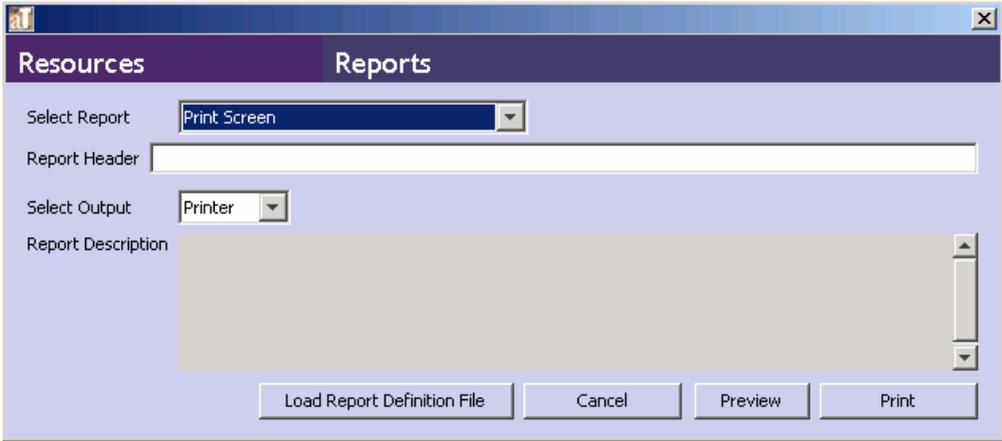
Generating a records set

To print multiple records:



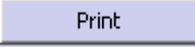
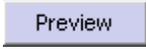
1. From any list screen, use the  button and filter or search options or select the desired records with the Shift/Ctrl keys, then use the right-click mouse function and highlight the **list selected records** option to create the set of records you wish to output.
2. Use the buttons at the top of each column to sort the list in the order you wish the report to be generated.

3. Press the  button.



4. The **Select Report** field provides a list of reports available for the functional area.

Note: A list of reports for each functional area, along with a description and a sample of each report, is available in the appendices.

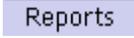
5. Enter any text you wish to appear in the **Report Header**.
6. **Select Output** for the report. Options are: Printer, PDF, HTML, RTF, Excel, or CSV.
7. Press the , , or  button.

Generating a finding aid

To generate a finding aid:

1. Select the resource record(s) from which you wish to generate a finding aid(s).



2. Click on the  button.
3. Select **Finding Aid** in the **Select Report** drop-down list.



4. Two options appear:

Suppress components and notes when marked “internal only”? Indicate if you wish to suppress components and notes when the status is set to “Internal.” If checked, the internal notes will not be exported. If left unchecked, the internal notes will be exported with the audience attribute set to "internal."

Include DAO’s in output? Indicate if you wish to include <dao> elements in your output. This is only relevant when there are digital object records linked to the description. If not selected, the Finding Aid will not include any <dao> elements. If selected, the <dao> will reference the METS identifier where there is one. Where there is no METS identifier, the <dao> will reference the file versions, their file use statements and when present the title, date and label of the associated node.

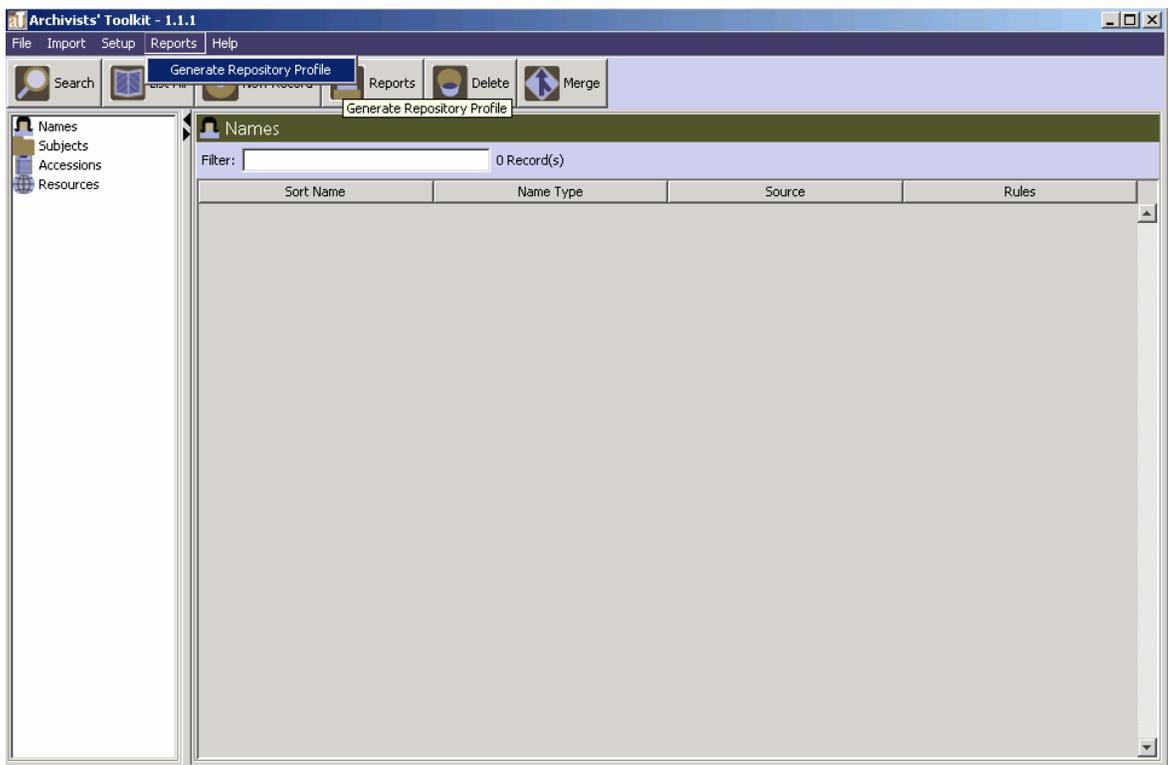
5. Add a **Report Description**, if desired.
6. Press the  button. The **Preview** functionality is not available for finding aids.

Generating a repository profile

A **Repository Profile** provides a quick snapshot of the repository’s holdings listed in the Toolkit. Statistical information about Resources, Accessions, Extent of Holdings, Name Authorities and Subject Authorities is compiled within the report.

To generate a repository profile:

1. From the **Reports** menu, select **Generate Repository Profile**.



2. The Toolkit presents a progress graphic as the report is generating. Upon completion, the JasperViewer window will appear with a preview of the **Comprehensive Repository Profile** report. This preview can then be printed or saved.

Note: Repository profiles can take a long time to generate.

Comprehensive Repository Profile on Sep 10, 2007
ArchivistsToolkit

Resource Information

Total Resources	15		
Items	2	Resources With Restrictions	0
Aggregations	13	Resources Without Restrictions	15

With Finding Aids	7	Of resources having finding aids, status of finding aid is	
Without Finding Aids	8	Finding Aid Status	# of Resources
			5
		unverified-full-draft	2

Collectively, the resources represent the following languages:		Collectively, the resources represent the following instances:	
Language	# of Resources	Instance Type	# of Resources
Abkhaz	2	Mixed materials	216
Achinese	1		
Adygei	1		
Afar	1		
English	6		
Esperanto	1		
Hungarian	1		
Zapotec	1		
eng	1		

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Customizing reports

The Toolkit allows customized reports to be added to the application environment, however customization of reports is not possible within the Toolkit interface. For more information on using customized reports, see Chapter 15.

Exporting data

Overview

The Toolkit supports export of data from resource description and digital object description records. For archival resources, EAD and resource-level MARCXML (e.g., collection-level MARCXML records) can be exported. For digital objects, METS, MARCXML, MODS, and Dublin Core can be exported. For each type of export, a map of the AT field to export field is located in the appendices.

Exporting data with mixed content

Mixed content is data that contains both text and mark-up. The Toolkit allows the existence of mixed content in many of the description elements. This is because mixed content is allowed in EAD, currently the primary standardized output for archivists in the United States. The Toolkit's model for mixed content is, indeed, based on EAD and therefore not relevant to other descriptive outputs. For this reason, mixed content is only retained for EAD exports. It is stripped when exporting MARCXML, METS, MODS, and Dublin Core. Users should be aware, however, that mixed content that is not well-formed XML may not be stripped accurately. More information about mixed content can be found in Chapter 5.

Exporting standardized metadata for archival resources

Overview

The Toolkit provides the ability to export EAD and MARCXML for archival resources. EAD export will include all data in the resource description and any linked resource component records. There is also the option of exporting any linked digital object descriptions as <dao> elements within the EAD. MARCXML export will only export data from the resource level description. It will include a link to an online finding aid if noted in the resource description but not to any digital objects linked to the resource.

Exporting EAD

To export EAD from a resource description:

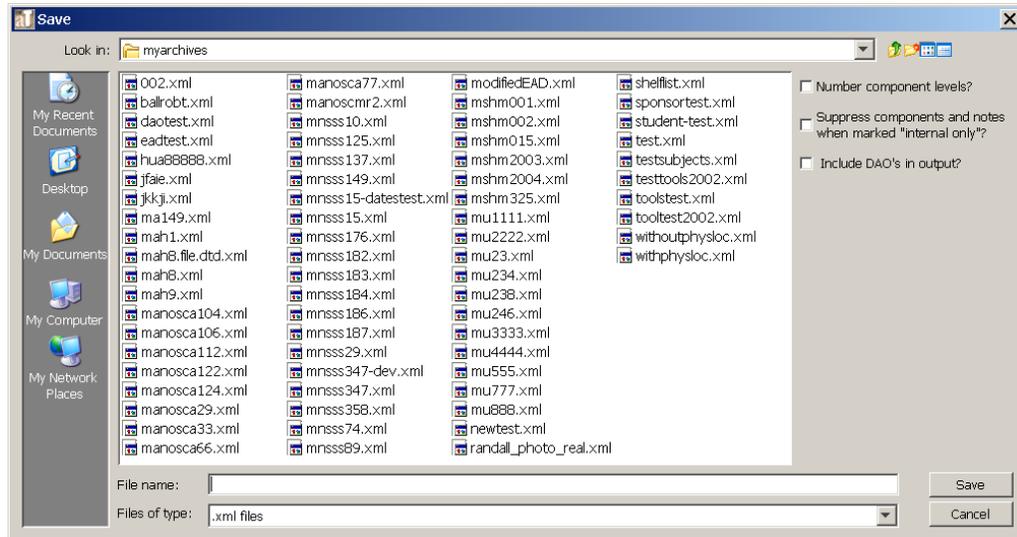
1. Open the resource description to be exported.

2. Press the  button.

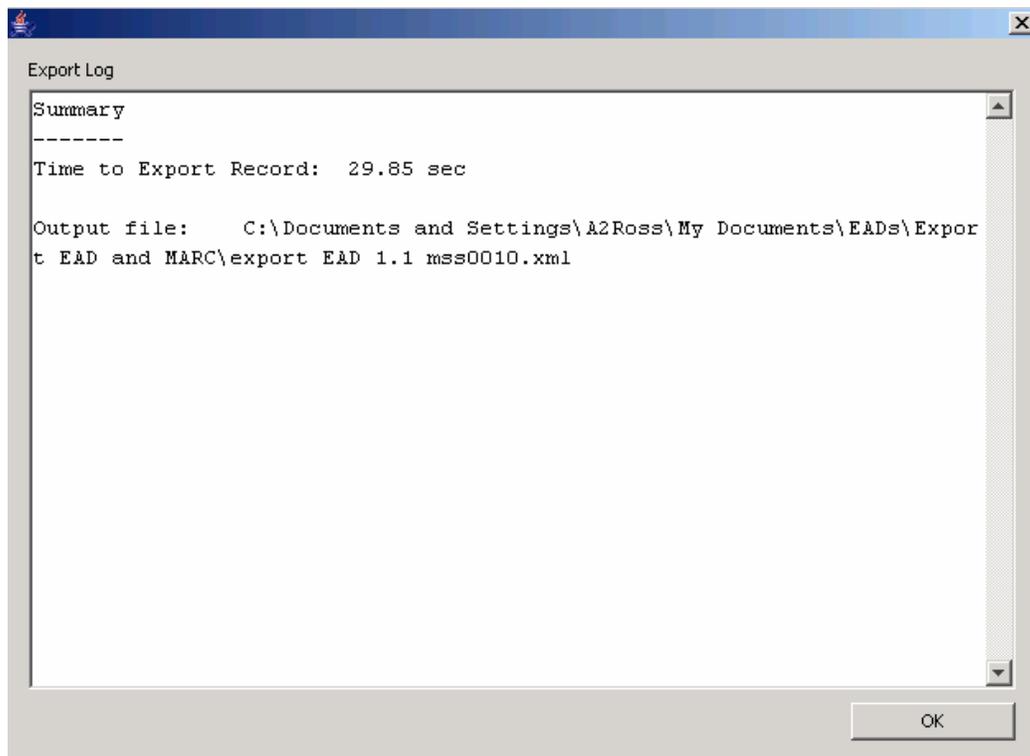
3. Indicate if you wish to output numbered component levels (<c01> as opposed to <c>).

Note: EAD only defines twelve component levels. The Toolkit does not support outputting numbered component levels exceeding twelve levels.

4. Indicate if you wish to suppress components and notes when the status is set to “Internal.” If checked, the internal notes will not be exported. If left unchecked, the internal notes will be exported with the audience attribute set to “internal.”
5. Indicate if you wish to include <dao> elements in the output. This is only relevant when there are digital object records linked to the description. If left unchecked, the EAD will not include any <dao> elements. If selected, the <dao> will reference the METS identifier where there is one. Where there is no METS identifier, the <dao> will reference the file versions and their file use statements, and output the file versions listed according to their sequence.
6. Open the folder where the file is to be saved, and indicate the name of the file (usually the same as the **EAD Identifier**)



7. Press **Save** to export EAD.
8. A progress graphic will appear while the EAD is generating. An **Export Log** will appear at the completion of the process and list the export time and output file(s).



Batch Exporting EAD

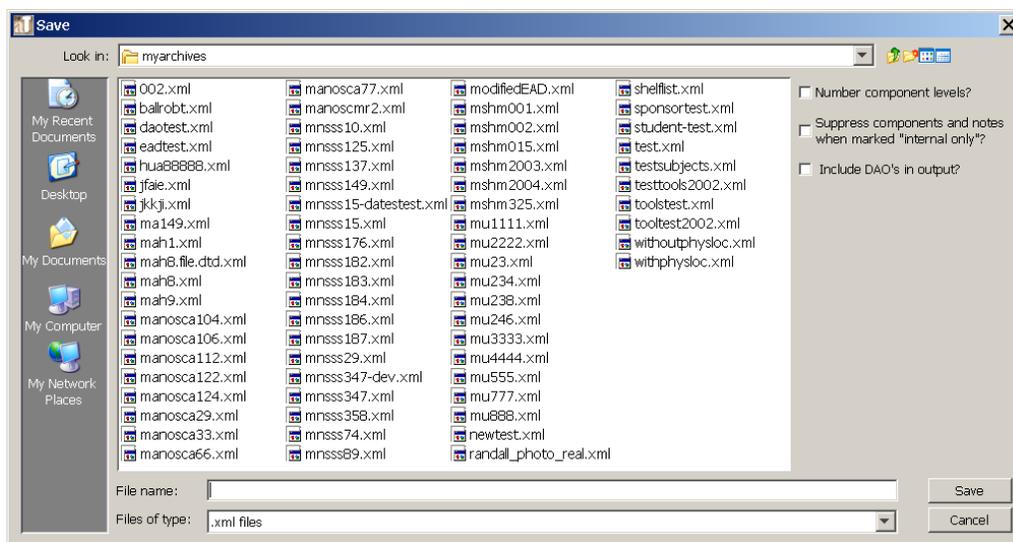
EAD can also be exported in batches rather than singly. To export a batch of EAD files:

1. Select the resource records from which the EAD files should be generated. A batch of EAD files can only be created from the Resources list view.

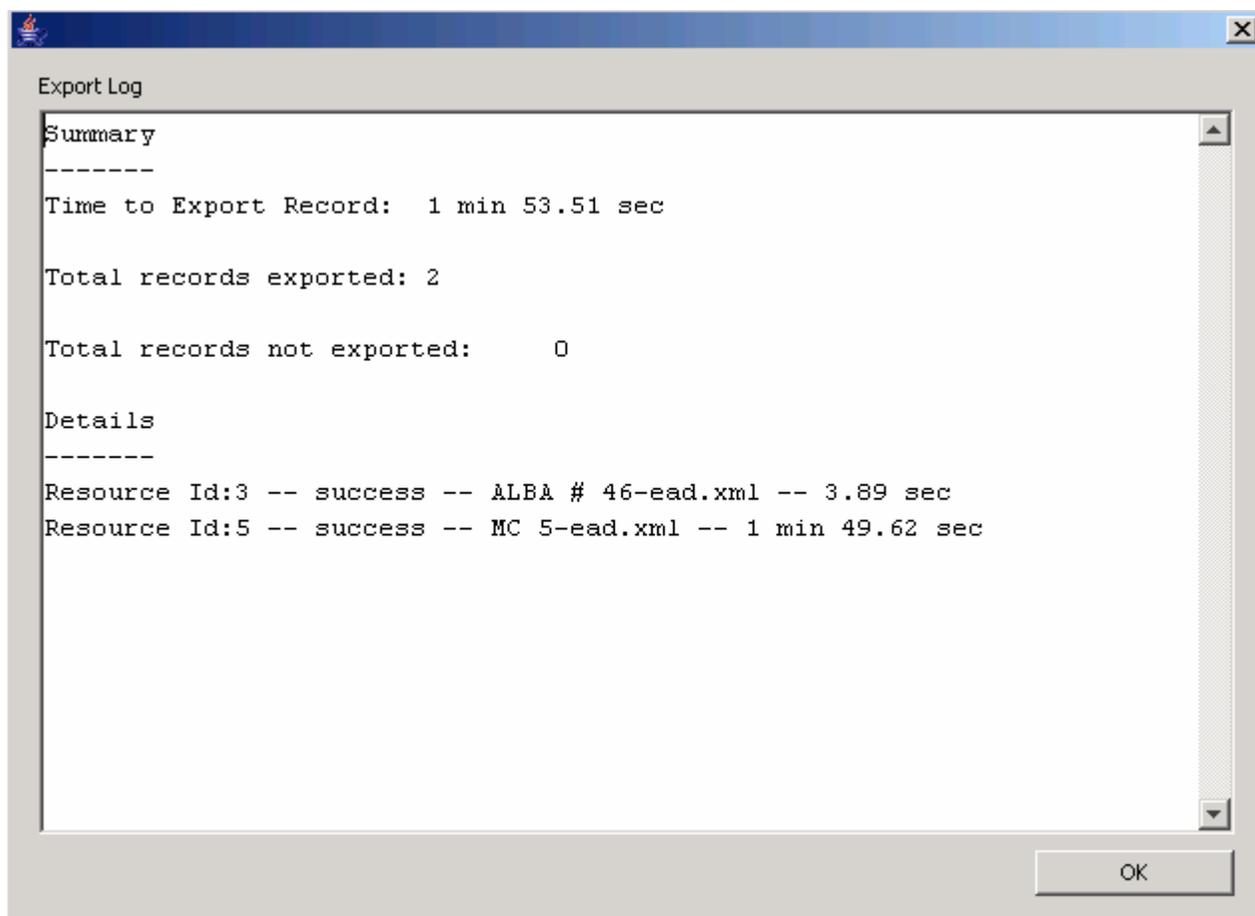
- Press the  button.
- Indicate if you wish to output numbered component levels (<c01> as opposed to <c>).

Note: EAD only defines twelve component levels. The Toolkit does not support outputting numbered component levels exceeding twelve levels.

- Indicate if you wish to suppress components and notes when the status is set to “Internal.” If checked, the internal notes will not be exported. If left unchecked, the internal notes will be exported with the audience attribute set to “internal.”
- Indicate if you wish to include <dao> elements in the output. This is only relevant when there are digital object records linked to the description. If left unchecked, the EAD exports will not include any <dao> elements. If selected, the <dao> will reference the METS identifier where there is one. Where there is no METS identifier, the <dao> will reference the file versions and their file use statements, and output the file versions listed according to their sequence in the digital object record.
- Open the folder where the files are to be saved.



- Press **Save** to export EADs.
- A progress graphic will appear while the EADs are generating. An **Export Log** will appear at the completion of the process and list the export time and output file(s).

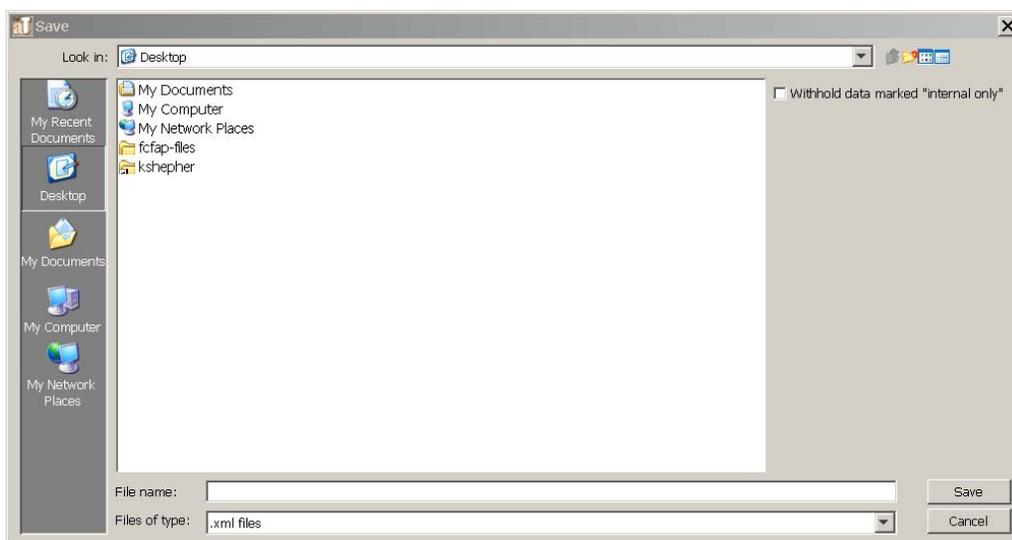


Exporting MARCXML

Note: The granularity of certain fields, such as subject headings, is not the same in the Toolkit as in MARCXML. In addition, the Toolkit's mapping of certain elements into MARC may differ slightly from your repository's existing practices. Therefore, you may wish to edit the Toolkit's MARCXML after it has been exported from the system. See the appendices for export mapping from the Toolkit to MARCXML.

To export MARCXML from a resource description:

1. Open the resource description to be exported.
2. Press the  button.
3. Indicate if you wish to suppress components and notes when the status is set to "Internal." If "Withhold data marked 'internal only'" is selected, the internal notes will not be exported. If left unchecked, the internal notes will be exported with the audience attribute set to "internal."
4. Open the folder where the file is to be saved, and indicate the name of the file.

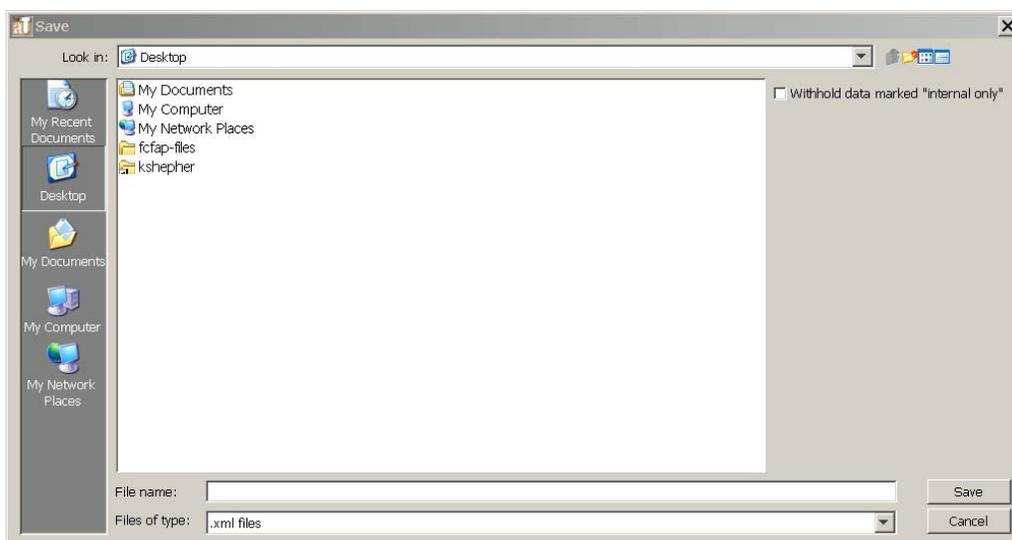


5. Press **Save** to export MARCXML.

Batch Exporting MARCXML

To batch export MARCXML from a resource description:

1. Select the resource records from which the MARCXML records should be generated. A batch of MARCXML records can only be created from the Resources list view.
2. Press the  button.
3. Indicate if you wish to suppress components and notes when the status is set to “Internal.” If “Withhold data marked ‘internal only’” is selected, the internal notes will not be exported. If left unchecked, the internal notes will be exported with the audience attribute set to “internal.”
4. Open the folder where the files are to be saved.



5. Press **Save** to export MARCXML.

Exporting standardized metadata for digital objects

Overview

The Toolkit offers a number of options for exporting data from digital object descriptions. METS can be exported with descriptive metadata encoded in either MODS or Dublin Core. MARCXML, MODS, or Dublin Core descriptive metadata can also be exported.

Note: It is also possible to export digital object descriptions as <dao> elements in an EAD by checking the appropriate box in the EAD export dialog window.

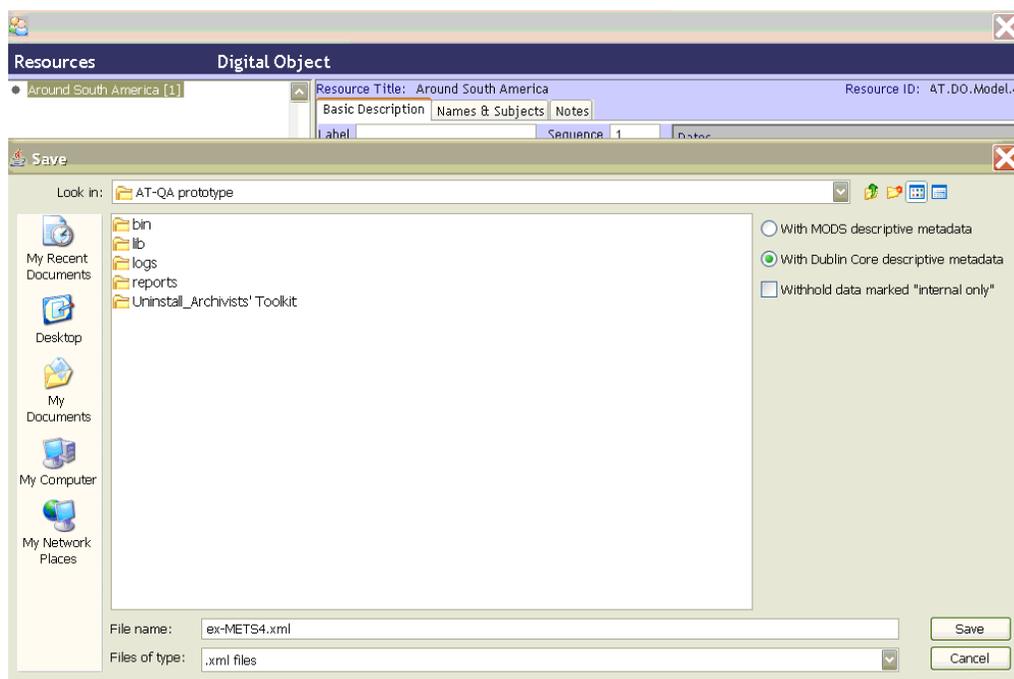
Exporting METS

To export METS from a digital object description:

1. Open the digital object record to be exported.



2. Press the  button.
3. Choose whether to export METS with MODS descriptive metadata or Dublin Core descriptive metadata.
4. Indicate if you wish to suppress components and notes when the status is set to “Internal.” If “Withhold data marked ‘internal only’” is selected, the internal notes will not be exported. If left unchecked, the internal notes will be exported with the audience attribute set to “internal.”
5. Open the folder where the file is to be saved, and indicate the name of the file (usually the same as the **METS Identifier**).



6. Press **Save** to export METS.

Note: The METS files created by the AT are designed to be compliant with the METS Navigator (<http://metsnavigator.sourceforge.net/>) created by the Indiana University Digital Library Program. The METS Navigator is an open source application made available to the general METS using community. Minimal configuration of the METS Navigator is required to accommodate the file use values utilized in the Toolkit.

Exporting MARCXML

To export MARCXML from a digital object description:

1. Open the digital object record to be exported.

2. Press the  button.

3. Indicate if you wish to suppress components and notes when the status is set to “Internal.” If “Withhold data marked ‘internal only’” is selected, the internal notes will not be exported. If left unchecked, the internal notes will be exported with the audience attribute set to “internal.”
4. Open the folder where the file is to be saved, and indicate the name of the file.
5. Press **Save** to export MARCXML.

Exporting MODS

To export MODS from a digital object description:

1. Open the digital object record to be exported.

2. Press the  button.

3. Indicate if you wish to suppress components and notes when the status is set to “Internal.” If “Withhold data marked ‘internal only’” is selected, the internal notes will not be exported. If left unchecked, the internal notes will be exported with the audience attribute set to “internal.”
4. Open the folder where the file is to be saved, and indicate the name of the file.
5. Press **Save** to export MODS.

Exporting Dublin Core

To export Dublin Core from a digital object description:

1. Open the digital object record to be exported.

2. Press the  button.

3. Indicate if you wish to suppress components and notes when the status is set to “Internal.” If “Withhold data marked ‘internal only’” is selected, the internal notes will not be exported. If left unchecked, the internal notes will be exported with the audience attribute set to “internal.”
4. Open the folder where the file is to be saved, and indicate the name of the file.
5. Press **Save** to export Dublin Core.

Managing data exports

The Archivists’ Toolkit is designed to produce data exports, or metadata records, such as EAD, MARCXML, MODS, DC, METS. The application does not, however, provide the means to manage, access, or display those export products. It is assumed the exports will be added to external access delivery systems such as an EAD database, an Integrated Library System (ILS), or a METS database where the objects can be searched and displayed to end users. However, the data for each record should be stored and edited in the Toolkit.