

Chapter 3

Archivists' Toolkit™ Basics

Overview

This chapter introduces the Archivists' Toolkit™ interface and basic features. It describes starting and logging into the application and working with Toolkit records.

Getting started

Starting the Archivists' Toolkit™

Launching the Archivists' Toolkit™ depends upon where you chose to locate Toolkit shortcuts during the installation process. For all platforms:

- Double click the Toolkit icon on your desktop.
- Open the Toolkit from the folder in which you installed the application.

For the MAC platform:

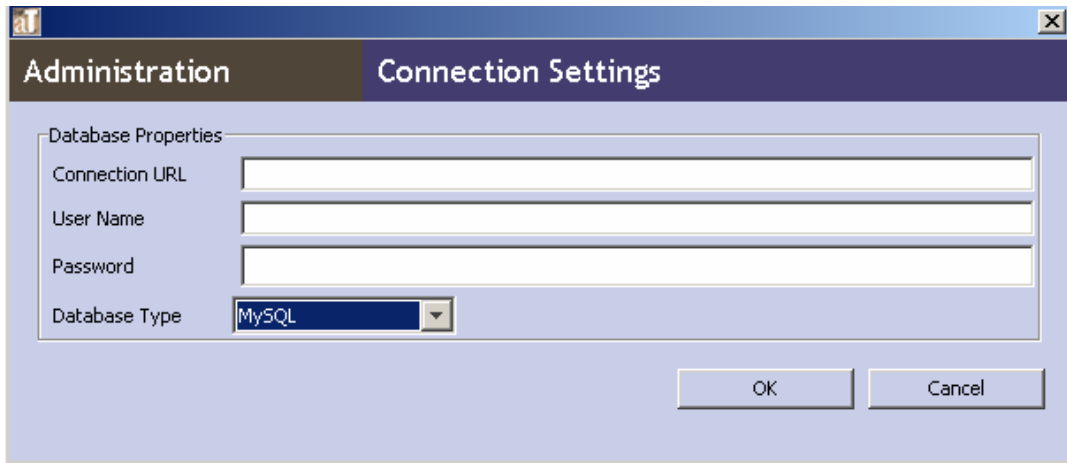
- Create a Toolkit alias installed in the dock, and then click on it.

For the Windows platform:

- Select the Toolkit from within the Programs menu.
- Select the Toolkit from the Start menu.
- Double click the Toolkit icon in the Quick Launch bar.

Establishing the database connection

The *first* time the Toolkit is started, a window opens, requesting connection information for the database. This connection information, which specifies the backend database targeted for the AT client, must be completed for the application to load. This information should be provided to you by the person who installed the Toolkit's database.



On subsequent launchings of the application, the **Connection Settings** window will be bypassed. The connection settings only need to be re-entered when the location of the targeted backend database changes, typically because the database has been moved or a different database is targeted.

To specify a connection for the AT client, enter the following information:

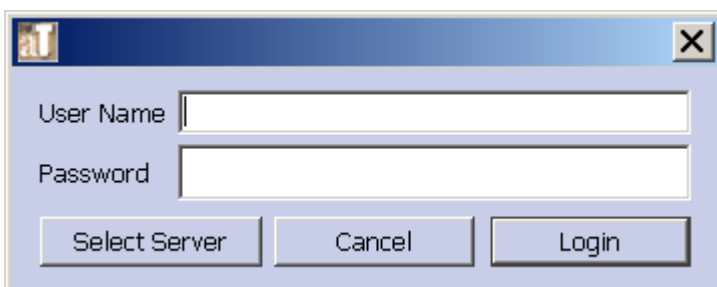
1. **Connection URL.** The network address of the database.
2. **User Name.** The user name established for the database installation.
3. **Password.** The valid password for this username.
4. **Database Type.** The type of database used (Microsoft SQL Server, MySQL, or Oracle).

Note: The username and password for the database is *not* the same as the username and password that is used on a regular basis to log into the Toolkit's client application. For more information on logging in to the client, see the next section of this chapter.

Note: The connection window should only appear for the first launching of the application. To change the connection settings after the initial launching of the application (if you are running multiple instances of the Toolkit, for example), press the **Select Server** button from the login window (displayed in the next section).

Logging in

Before the application fully loads, a login window will appear.

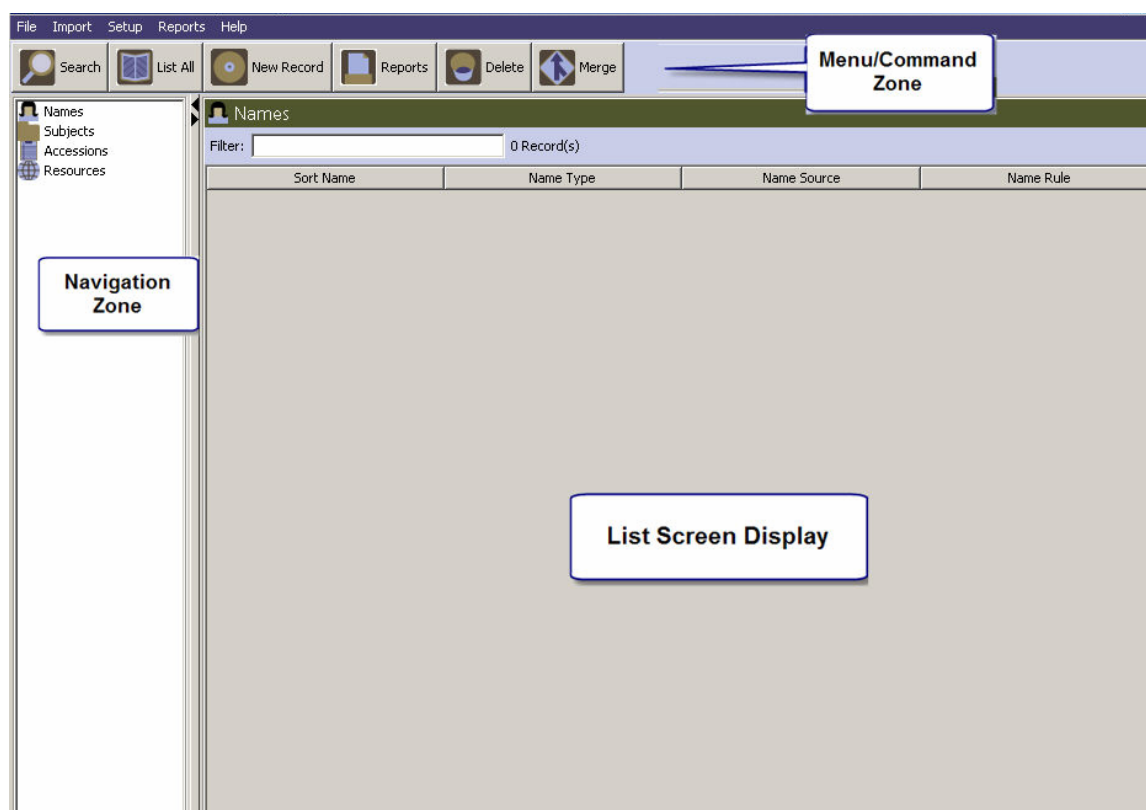


Enter your username and password and press **Login**, or press **Cancel** to stop the application from initializing. User names are not case-sensitive; passwords are case-sensitive.

Note: The **Username** and **Password** should be provided by the person who installed the Toolkit's database, or by the person managing the Toolkit in your repository. For information about creating new user names, see Chapter 5.

Becoming familiar with the Archivists' Toolkit™ interface

The application's initial screen appears when the launch process is completed. The primary AT screen has a menu / command zone at the top, a navigation zone on the left, and a list screen display zone on the right that occupies most of the window. Some screens for individual records have zones for navigation controls and record information at the bottom of the screen.



Working with records

Overview

The AT includes several kinds of records to support description and management of archival resources. Most of these record types are accessible through the navigation zone on the left of the main screen. Repository, location, and user records, however, are available through the **Setup** menu. Each of these records and their sub-records is described more fully in subsequent chapters.

Briefly, the records are:

Repository record

For identifying the repository having custody of the resources described. Includes sub-records for expressing data defaults to be used by the repository and basic characteristics of the physical repository, as well as its holdings and staff.

User record

For creating and managing Toolkit user accounts.

Location record

For indicating the location(s) at which a resource is or may in the future be located. Location records may be defined in advance and then linked to a resource as it is processed and then shelved at the location.

Accession record

For recording accessions and basic collection management data.

Resource record

For describing an item or collection of items in a standard multi-level manner.

The resource record contains sub-records for resource components, digital objects, and material instances (e.g. text vs. microform vs. digital object). A sub-record is a linked record that can only be viewed, created, and edited through the primary record.

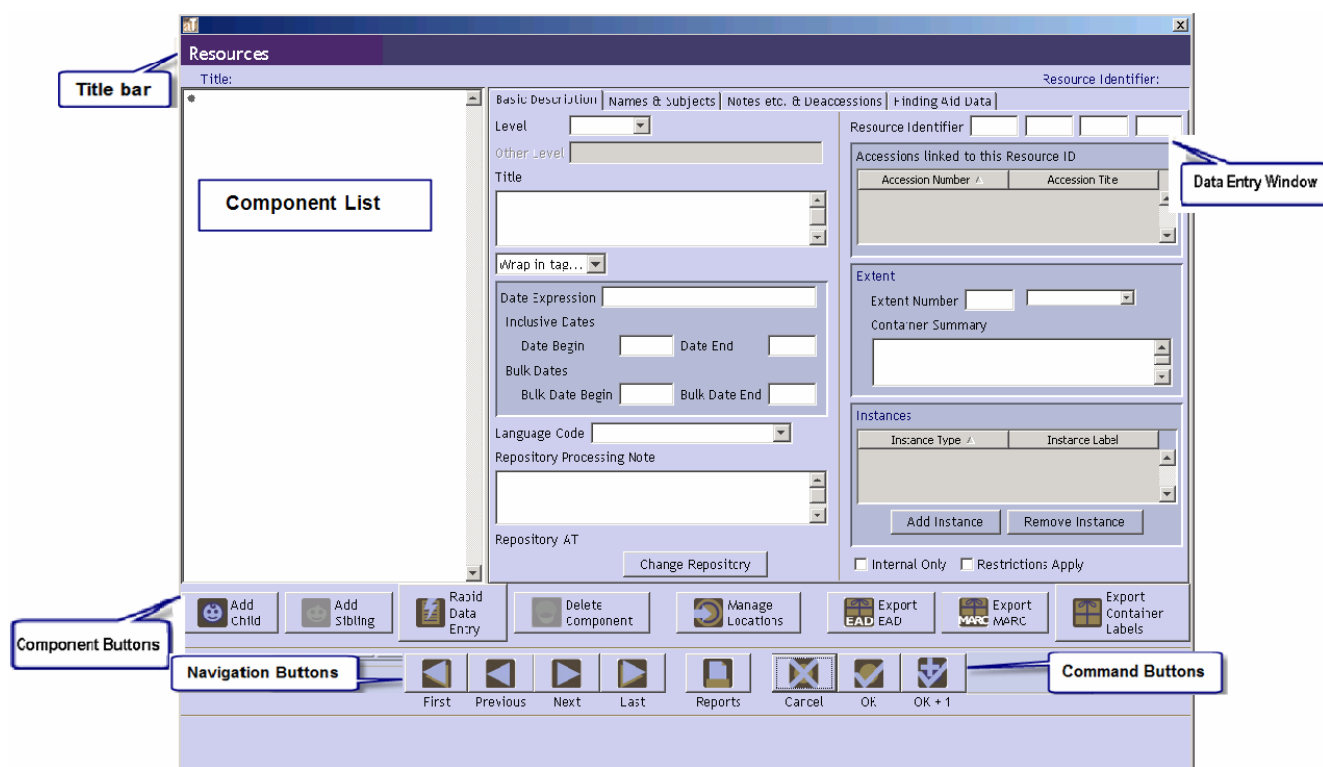
Name record

For recording the names (personal, corporate body, or family) associated with accessions and/or resources as a creator, source, or subject. The name records serve as name headings in exports such as EAD, MARCXML, and MODS.

Subject record

For describing topical terms associated with an accession or a resource. The subject records serve as subject headings in exports such as EAD, MARCXML, and MODS.

Basic components of a record



Title bar

The title bar for each record type appears at the top left of the record with the title of the record type— e.g, Resources, Accessions, etc, and each has its own color scheme.

Component list / buttons

These buttons appear only with resource, resource component, and digital object records. They enable the hierarchical listing of the components comprising a resource or digital object. The component buttons support adding additional components—either children or siblings, or deleting components. The order of the component list may be modified using the drag and drop feature. The component list / buttons are discussed more fully in Chapter 9.

Data entry window

The window where data is entered to create a certain kind of record.

Navigation buttons

These buttons are for navigating to the next or previous record in a list of records, or to the first or last record in the list. Next, previous, first, and last are all relative terms and are determined by how the list is sorted.

Command buttons

Buttons for canceling a record, saving a record, or saving a record and opening a new record window.

Tracking bar

Located at the bottom of the record, the tracking bar indicates the record number, when the record was created and by whom, and, if applicable, when the record was last modified and by whom. This information is searchable using the search editor tool described in Chapter 4, and will assist in tracking record creation and editing activity.

Basic characteristics of Toolkit records

A record in the Archivists' Toolkit™ may contain any number of data elements (fields). Each element allows either alphanumeric, Boolean (yes / no), date, or numeric data to be entered.

Some alphanumeric fields have drop-down lists containing predefined terms for use in the field. The repository can modify most of these lists by redefining the lookup list via the **Configure Application** option on the **Setup** menu (see Chapter 15); however, some lists may not be modified, in whole or in part, as correct operation of the application depends on the values in the lists. The list of note types in the resource and resource component records is an example of a list that may not be modified. A table with a complete list of lookup lists, the field to which they are associated, and whether or not the values in the list can be modified is available in the appendices.

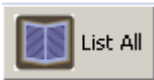
Some of the records in the Toolkit are multi-sectioned. The individual sections of a record are represented as tabs across the top of the record. Clicking on one of the tabs will bring that part of the record to the front of the display where data can then be entered into it.

Some of the records contain sub-records that are available only through the primary record. For example, the container record is only available within the resource and resource component records, whereas the file version record is only available within the digital object record.

Finally, some of the records may be linked to other records as described more completely in the Linking Records section of this chapter, and in Chapter 12.

Listing records

Records from any of the four key functional areas in the Toolkit (**Names**, **Subjects**, **Accessions**, **Resources**) may be listed from the initial browse screen. For example, to list resource records, either double click on **Resources** in the left column, or click once on **Resources**. The bar across the top of

the right-side display zone will then change to **Resources**. Click the  button at the top of the window and a resource record listing will be displayed.

Note: As you work in different functional areas, the color of the title bar in the display zone changes. For example, if you click on **Accessions** in the main screen, the bar at the top of the right-hand display zone is green, but if you click on **Resources**, the bar is purple. The same will be true for the headers in each of the interface windows for each functional area.

Title	Extent Number	Resource Id	Extent Type	Resource Identifier
Peveril Meigs. Baja California...			1	MS5 0530
Joan Jensen Asian Indian im...			2	MS5 0585
Thomas Nee collection of lett...			3	MS5 0609
Microcirculatory Society Reco...			4	MS5 0632
James Stuart and Stevey Bru...			5	MS5 0673
Professional Staff Congress/...			6	Wagner 9

All the records for the active functional area will be listed in the main area of the window. The total number of records listed will be posted to the right of the filter frame just below the title bar for the area. The list can be navigated through by using either the scroll bar at the right side of the window or by using the up and down arrow keys on the keyboard.

Sorting record lists

Once it is retrieved, every list may be sorted in multiple ways. For example, to sort the list of resources, double click on the **Title** heading at the top of the title column. This will establish the column as the active sorting column. Click on the **Title** heading to change the sort order of the titles, either in ascending or descending order. An arrow will appear after the column label and will point upward for an ascending sort or downward for a descending sort.

Levels may be added to the sort by selecting an additional column(s) to sort on after the first column is selected and set. Simply click once on the heading for another column, and then click again to toggle between an ascending or descending sort.

To clear the existing sort settings, double click on the column that is to be the basis of the new sort. For instance, to sort resources by resource identifier, double click on the **Resource Identifier** heading at the top of corresponding column and then indicate if the sort should be in ascending or descending order.

Other columns may be added to the list screen using the **Configure Application** commands (covered in Chapter 15).

Printing record lists

Records lists can be printed in a table similar to their appearance on the screen. The current record list is also the set of records that will be output in reports. For more information about printing records lists and other reports, see Chapter 14.

Creating a new record

To create a new record:

1. Select the functional area for the new record (**Names**, **Subjects**, **Accessions**, or **Resources**).

2. Click on the  button on the top of the window.


A new name, subject, accession, or resource record will open on top of the main window. Most of the records are multi-tabbed, with each tab opening a different part of the record. Simply click on a tab to open that part of the record.

3. Enter data into the fields in any of the tabbed sections. Data in one section will be retained while opening another section of a record.


Note: See Chapters 5-13 for specific instructions on creating various records in the Toolkit.

Saving a record



To save a record, simply click on the  button at the bottom of the record screen. This saves all the data that has been added to the record. It will save all data that has been added to sub-records such as a resource component record or digital object record.



If you are entering multiple records, the  button will save the record you are working in and open a new record of the same type.



Clicking the  button or closing the record using the window close button at the top right corner causes additions to the record to be discarded.

Most records in the AT require that data be present in certain elements for the record to be saved. For instance, the resource record requires an extent statement. If either the extent number or extent measurement is not completed, then the record cannot be saved until values are entered for both fields.

Trying to save an invalid record produces a validation error message indicating which field(s) need(s) to be completed for the record to be saved. See the **Record Validation Rules** appendix for a complete list of fields necessary to create a valid record.

Editing a record

To edit a record:

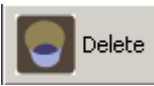
1. Locate the record to be edited by using the filter box in the main screen or the search tool, both of which are described in Chapter 4. Once you see the record you are interested in editing, double click on the record entry in the list screen.
2. Make the desired changes in the record.
3. Press **OK** to save the changes, or **Cancel** to discard the changes.

Note: Editing a record may affect output from linked records. For example, changing a subject term changes that term in all of the descriptive outputs (for example, EAD and printed finding aids) for resources linked to the subject. Repositories implementing the Toolkit should establish procedures and workflows for updating information in one record that may affect linked records.

Deleting a record

To delete a record:

1. Locate the record(s) to be deleted by using the filter box in the main screen or the search tool, both of which are described in Chapter 4. Once you see the record(s) you are interested in deleting, click on the record entry in the list screen.

2. Press the  button.

The Toolkit will ask if you are certain that you want to delete the record(s).

3. Press **Yes** to delete the record(s).
4. The record(s) will be deleted.

Caution! Deleting a record may affect output from linked records. For example, deleting a subject term removes the link to that term from any accession or resource records linked to the record. The Toolkit will not warn you that linked records will be affected. It is advisable to search accessions and resources for any linked records before deleting any subject, name, or location records.

Linking records

The Toolkit allows you to link information stored in different types of records. This provides consistency of repeated data (such as names linked to multiple description records), and allows you to establish relationships between records.

The following linkages are possible in the Toolkit:

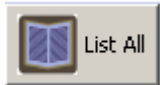
- Resource records may be assigned to accession records
- Location records may be assigned to accession and resource records
- Name records may be assigned to accession and resource records
- Subject records may be assigned to accession and resource records

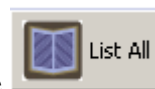
Navigating records

Records may be navigated using the list screens or the navigation buttons at the bottom of each record screen.

To navigate records using the list screen:

1. Close all record windows and return to the list screen.

2. Select the functional area containing the records to browse and then click the  button.



3. Sort the list as desired.

Once the display screen is populated and sorted, use the scroll bar to move forward and backward in the list until the record desired is found, or use the up and down arrow keys to move forward or backward one record at a time.

4. Double click on any record to open it.
5. Navigate through the sorted list of records using the set of four navigation buttons located at the bottom of the record: **First**, **Previous**, **Next**, and **Last**.



As a whole, the functionality of these buttons is determined by contents and sort order of the list that is open in the list screen. If resources are listed, then the navigation buttons will move through the list of resources in the order displayed in the list screen.

To consider a list of resources sorted in descending order, the **First** button would open the record at the top of the descending title list, in effect the last title alphabetically, whereas the **Last** button would open the last title in the list, or the first alphabetically.

The **Previous** button will open the record that occurs in the list just before the record that is already open, whereas the **Next** button will open the record that occurs in the list just after the record that is already open.

To reiterate, what records will be opened by the navigation button depends on how the list of records is sorted. If the primary sort of resource records is on **Resource Id**, then using the navigation buttons will cause different results than if the primary sort is on **Title**.