

# Chapter 5

## Managing the Archivists' Toolkit™

### Overview

The Archivists' Toolkit™ has a setup menu with options for creating a repository record, establishing users and assigning permissions, managing locations, editing lookup lists, and customizing the application interface. Some tasks such as creating a repository record and establishing users should be done prior to entering other data into the Toolkit. Other tasks, such as customizing the application interface, can be done at any time, although it is ideal to become familiar with the default application before doing so (see Chapter 15 for details on customizing the application interface.)

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Note: Once you have completed the process of establishing your repository record and creating all needed user accounts, you may wish to enter location records for the repository. Creating location records before they are assigned may result in more consistency among the records; the Toolkit provides a **Batch Add** feature for efficient creation of multiple location records. For details on creating and assigning location records, see Chapter 13.

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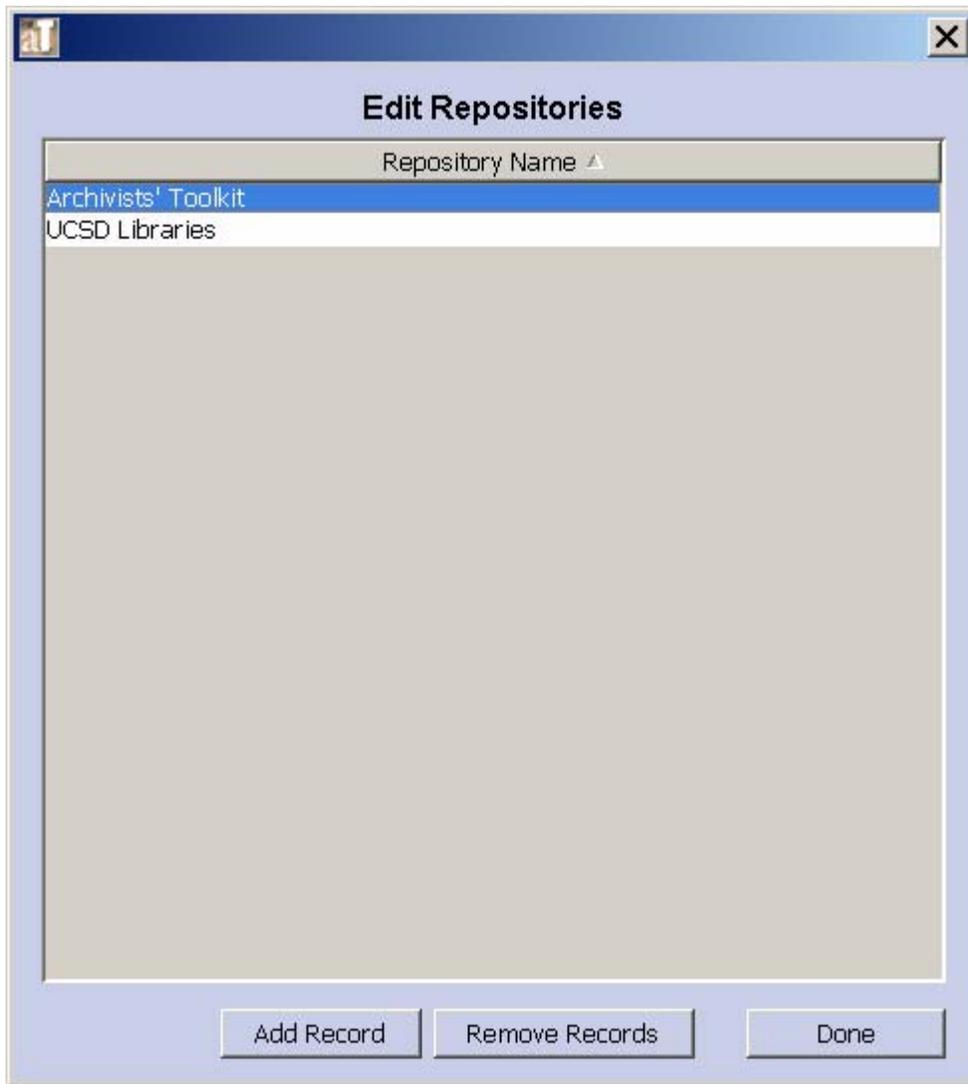
### Creating the repository record

#### Overview

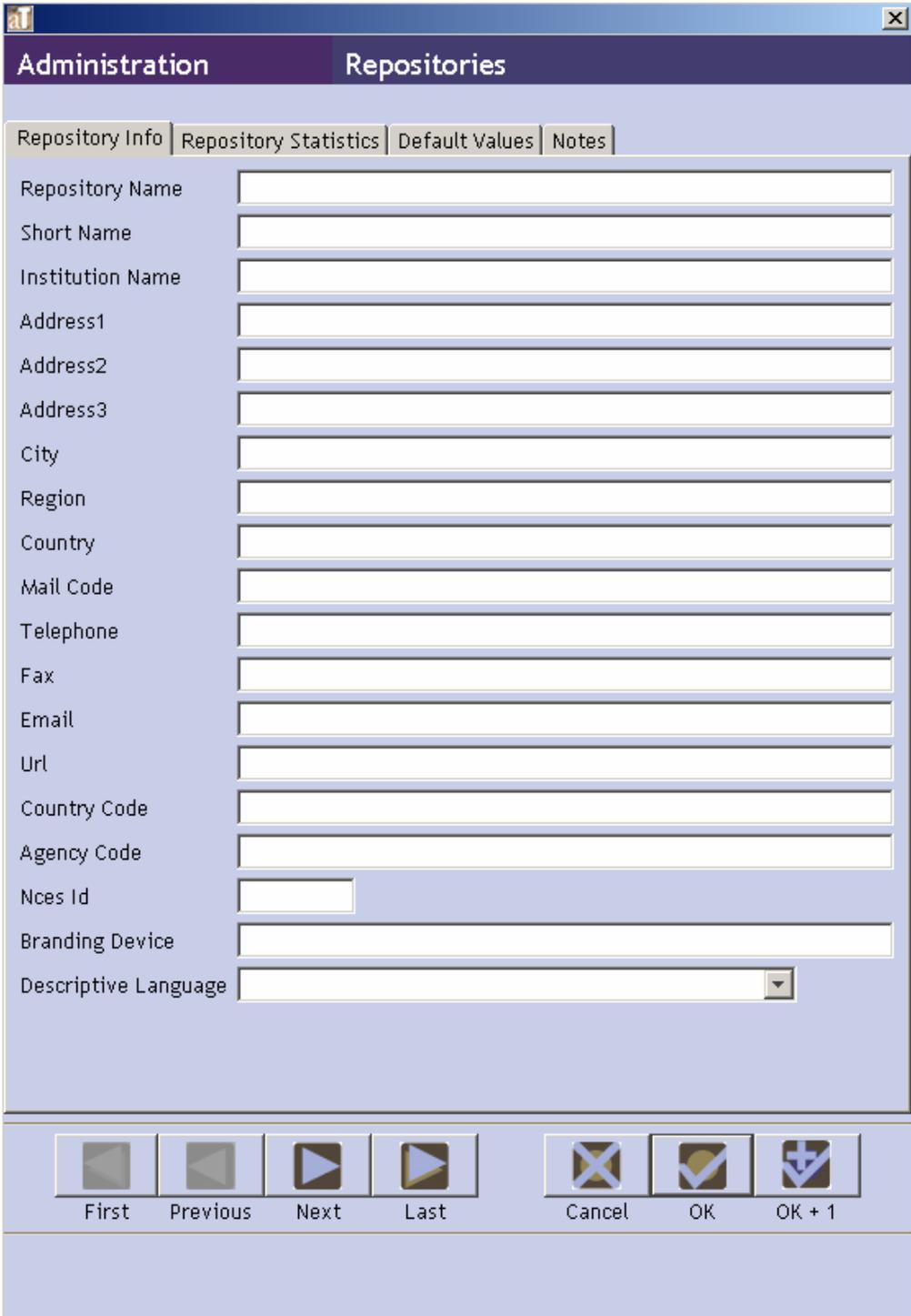
During installation of the Toolkit, a basic repository record is created. The repository record serves two basic purposes: to store information for later output, and to differentiate between repositories. It stores information, like the repository's contact information and identifying codes, so that it can be later output in administrative and descriptive reports. For example, this information serves as the source for content in the headers for EAD and METS. Recording and storing it in one place – at the repository level of description – alleviates the need for repetitive data entry at the resource level and makes revision of all AT exports easier. The second purpose of the repository record is to distinguish one repository's records and data rules from those of another repository using the same AT implementation in a multi-repository implementation of the Toolkit.

#### Basic steps for creating the repository record

1. From the **Setup** menu, select **Repositories**.



2. Press the  button.



The screenshot shows a software window titled "Administration" with a sub-tab "Repositories". Below the tabs are four sub-tabs: "Repository Info", "Repository Statistics", "Default Values", and "Notes". The "Repository Info" tab is selected and contains the following fields:

- Repository Name
- Short Name
- Institution Name
- Address1
- Address2
- Address3
- City
- Region
- Country
- Mail Code
- Telephone
- Fax
- Email
- Url
- Country Code
- Agency Code
- Nces Id
- Branding Device
- Descriptive Language (dropdown menu)

At the bottom of the window, there are seven buttons: "First", "Previous", "Next", "Last", "Cancel", "OK", and "OK + 1".

3. Enter the **Repository Name**. This is the name that will appear on administrative reports and descriptive outputs.
4. Enter the **Short Name** for the repository, which will appear in the Toolkit interface.

5. Save the repository record by pressing the  button at the bottom right corner of the window. If you are entering multiple records, the  button will save the record you are working in and open a new repository record.

**Caution!** If the record does not include the required elements listed above, the Toolkit will indicate that the record cannot be saved because one or more of the required fields is not complete. The incomplete fields will be listed in the error message. These fields must be completed in order to save the record.

## Repository record data elements

### Elements Required by the Archivists' Toolkit™

1. **Repository Name.** Enter the name of the repository as it should appear on administrative reports and descriptive outputs.

Examples:

University of Massachusetts Amherst Special Collections  
and University Archives  
Scripps Institution of Oceanography Archives

2. **Short Name.** Enter an abbreviated version of the repository name, as you would like it to be displayed in the AT interface.

Examples:

UMass SCUA  
SIO Archives

### Additional Elements

The minimum repository record can be extended by recording data for any of the following data elements. None of these data elements are required to create the repository record, but many of them may be desirable. For example, your institution will likely want to include contact information that can be exported with any descriptive outputs that will be shared with researchers.

1. **Address.** The Toolkit offers three address lines for the repository's address, although none are mandatory.

Examples:

W.E.B. Du Bois Library  
154 Hicks Way

2. **City.** The town or city in which the repository is located.

Examples:

Amherst

New York

3. **Region.** The repository's state, province, or other region.

Examples:

MA

Ontario

4. **Country.** Enter the country in which your repository is located.

Examples:

U.S.A.

Canada

5. **Mail Code.** Zip code, postal code or other mail code.

Examples:

01003

K1A 0N4

6. **Telephone.** Repository telephone number.

Example:

212-555-1212

7. **Fax.** Repository fax number.

Example:

212-555-1213

8. **Email.** Repository email address. Because this will be exported into descriptive outputs for long-term use, a general contact email may be desirable, rather than a specific staff member's email.

Example:

info@library.umass.edu

9. **URL.** URL for the repository web site.

Example:

<http://www.collectionscanada.ca/>

10. **Country Code.** The code for the country in which the repository is located. The country code should follow the ISO 3166-1-alpha-2 standard.

Examples:

US (United States)

CA (Canada)

11. **Agency Code.** The institutional code should follow the ISO 15511 standard. The purpose of ISO 15511:2003 is to define and promote the use of a set of standard identifiers for the unique identification of libraries and related organizations. Many U.S. institutions already use an appropriate code, assigned by the Library of Congress, in their catalog records. The Library of Congress can also assign codes for institutions in the U.S. that do not already have one.

Examples:

US-MaNoSCA

US-CaLjSIOA

12. **NCES Id.** The National Center for Education Statistics number used to identify schools in the U.S. The NCES Id can be found at: <http://nces.ed.gov/globallocator/>.

Examples:

510009000015

13. **Branding Device.** The URI for a repository logo.

Example:

<http://www.collectionscanada.ca/seal.gif>

14. **Descriptive Language.** The primary language used for description by the repository.

Examples:

eng

fre

## Repository Statistics

The **Repository Statistics** tab was designed to contain statistical information on repositories for the Archival Metrics project. The Archival Metrics project is working to standardize data collection instruments, procedures, and definitions to allow for consolidation and analysis of data across institutions.

### Basic steps for recording repository statistics

1. From the repository record, click on the **Repository Statistics** tab.



2. Select the **Add Statistics** button.

**Repositories Statistics**

Year Of Report

Services provided (check all that apply):

Digitization     Photographic Reproduction     Exhibit Loans

Retail Gift Sales     Food Beverage

Staff size (complete all that apply):

Professional FTE  Non-Professional FTE

Student FTE  Volunteer FTE

FTE Functional Distribution (complete all that apply):

Administration  Processing

Preservation  Reference

Collection Foci (check all that apply):

Historical     Institutional     Manuscript

Personal Papers     Other

Major Subject Areas

Percentage Off Site

Repository's Physical Characteristics (complete all that apply):

Net Usable Area  Administration Offices  Classrooms

Collections Storage  Reading Room

First Previous Next Last Cancel OK OK + 1

3. Enter the **Year Of Report**. This is the year in which the repository statistics were recorded. This is the only required field for this tab.



4. Save the repository record by pressing the  button at the bottom right corner of the window. The information entered will now be listed under the **Repository Statistics** list



screen. If you are entering multiple records, the **OK + 1** button will save the record you are working in and open a new **Repository Statistics** record.

5. The information entered will now be listed under the **Repository Statistics** list screen.

Administration Repositories Record 3 of 5

California Conservation Repository

Repository Info Repository Statistics Default Values Notes

| Year Of Report |
|----------------|
| 2003           |
| 2003           |
| 2002           |
| 1999           |

Add Statistics Remove Statistics

First Previous Next Last Cancel OK

Created: Jul 24, 2007 by A2Ross | Modified: Jul 25, 2007 by A2Ross | Record Number: 3

## Additional Elements

1. **Services provided.** Check the applicable patron services provided by the repository.
2. **Staff size.** A numerical representation of the types of staff members working at the repository.
3. **FTE Functional Distribution.** A numerical representation of the time the repository dedicates to archival tasks.
4. **Collection Foci.** Check all the applicable collection types for the repository.
5. **Major Subject Areas.** List the major subject areas the repository's collections cover.
6. **Percentage Off Site.** A percentage representing a portion of the repository's total collection that is stored off-site versus onsite.
7. **Repository's Physical Characteristics.** A square footage assessment of each of the areas the repository may have.

## Default Values

The repository record also contains a **Default Values** tab where default values for data elements and notes within the Toolkit can be established. This is one of the Toolkit's customization features and is described in detail in Chapter 15.

## Notes

The repository record has a **Notes** tab for recording any narrative information about the repository itself. This might include the collection development policy, details about operating hours, etc.

1. **Label.** A header or brief explanatory statement of what the note is. A few options are provided in an editable drop-down list.

Examples:

Reading Room Hours

2. **Note Text.** Content of the note itself.

Examples:

Open Monday through Friday, 9:00-5:00

# Managing users

## Overview

Once the repository record is completed, the Toolkit is ready to be used by anyone with access to the computers / servers on which the application is installed. It is likely that most repositories using the Toolkit will want to control certain users' access to some of the information or features of the application.

The Toolkit provides the means to assign a user to one of five access classes. The classes represent an expanding sequence of functionality and access. Class 5, for instance, represents access to all the functionality and information stored in the AT for all repositories, while Class 1 represents access to very basic data entry functions for describing already accessioned resources and their components. Class 1 is the default value.

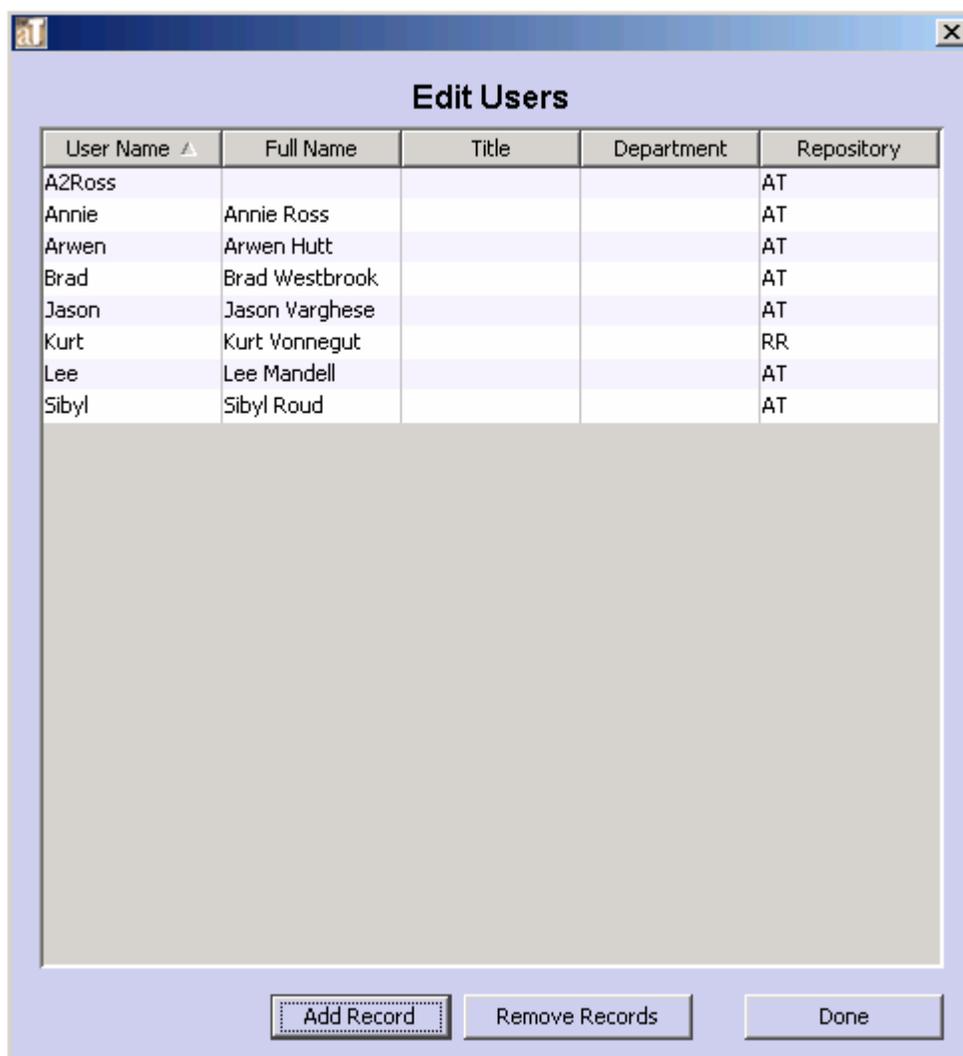
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Note: Class 5 permissions are analogous to what are often referred to as superuser permissions. As with other systems, it is not recommended to do daily work in the Toolkit while logged in as a superuser. Therefore, the Toolkit's administrator may wish to create and use two accounts - one as the superuser and one with Class 4 or Class 3 permissions. For more information on permission designations, see the **User record data elements** section. A detailed listing of user permissions is provided in the appendices.

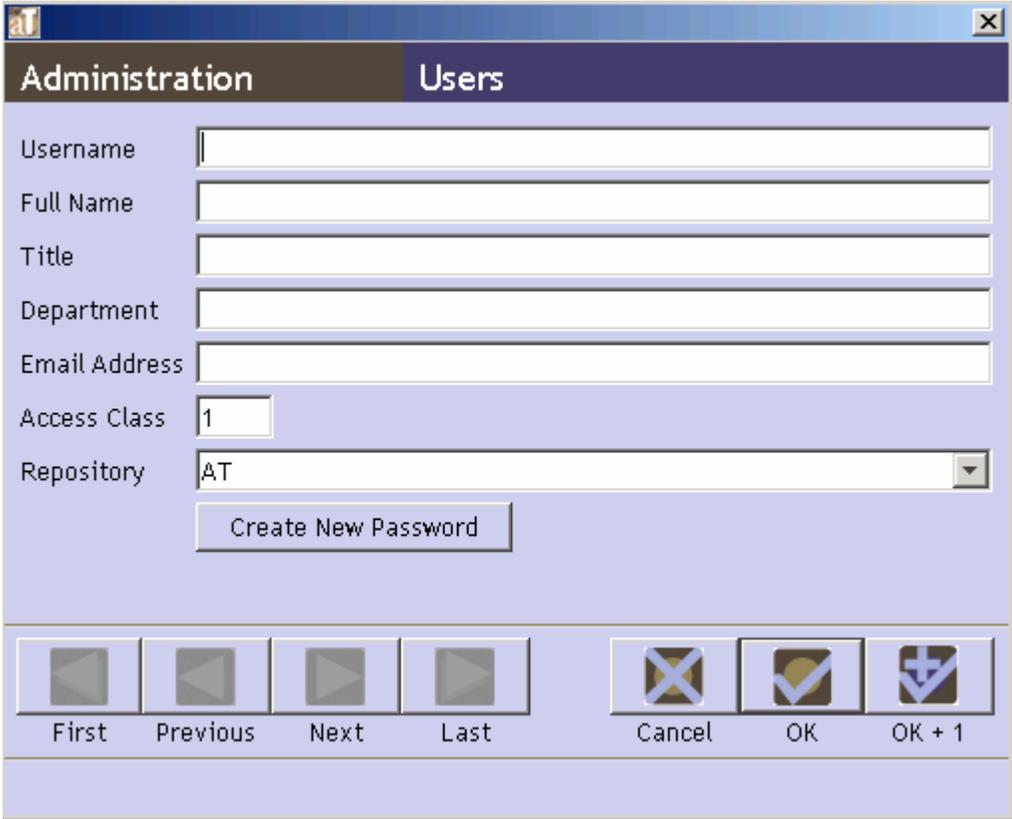
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## Basic steps for creating a user record

1. From the **Setup** menu, select **Users**.



2. Press the  button.



The screenshot shows a window titled "Administration" with a "Users" tab selected. The window contains several input fields: Username, Full Name, Title, Department, Email Address, Access Class (set to 1), and Repository (set to AT). Below these fields is a "Create New Password" button. At the bottom of the window, there are navigation buttons: First, Previous, Next, Last, Cancel, OK, and OK + 1.

3. Enter a **User Name**.
4. Press the  button to assign a password.

A window will appear asking you for the new password. Enter a password, re-enter it in the **Repeat New Password** box, and press **OK**.



The screenshot shows a dialog box titled "Create New Password". It has two input fields: "New Password" and "Repeat New Password". Below the fields are two buttons: "Cancel" and "Create New Password".

5. Save the user record by pressing the  button at the bottom right corner of the

window. If you are entering multiple records, the  button will save the record you are working in and open a new user record.

**Caution!** If the record does not include the required elements listed above, the Toolkit will indicate that the record cannot be saved because one or more of the required fields is not complete. The incomplete fields will be listed in the error message. These fields must be completed in order to save the record.

## User record data elements

### Elements Required by the Archivists' Toolkit™

1. **Username.** Create a user name to use when logging into the Toolkit.
4. **Password.** Use the  button to assign a password for the user, as previously described.

### Additional Elements

The minimum user record can be extended by recording data for any of the following data elements:

1. **Full Name.** The user's complete name.

Examples:

John Depp  
Marie Smith

2. **Title.** The user's position title.

Examples:

Head, Archives and Special Collections  
Project archivist

3. **Department.** If your repository is organized into departments, you may wish to record the user's department here.

Examples:

Technical services  
Public services

4. **Email.** The user's email address.

Examples:

archivistname@university.edu

5. **Access class.** The access classes, ranging from one to five, correspond to the following permissions:

**Class 5: Superuser.** All read/write and functional permissions for all repositories sharing the installation.

**Class 4: Repository Manager.** All read/write and functional permissions for a single repository.

**Class 3: Project Manager.** Read only permissions for repository and user records, all other read/write and functional permissions for a single repository.

**Class 2: Advanced Data Entry Staff.** No application or project management customization permissions. Unable to read or write name contact information.

**Class 1: Beginning Data Entry Staff.** No application customization permissions. Unable to read or write name contact information. Read only access to accession, digital object, name and subject records. Read/write permissions on resource and component description records.

A more complete list of user class permissions is provided in the Appendices

6. **Repository.** Use the drop-down box to assign the user to the appropriate repository.