USER MANUAL

v. 2.2

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1.0   System Overview

Archon™ is a tool for managing descriptive information about archival materials and for publishing it on the web. It allows archives to easily create and publish finding aids for all types of archival materials. It also includes a method to track accessions (information about recently received and/or unprocessed materials) and an integrated digital library application.

The system allows archival staff to input descriptive records that are compliant with archival standards. Archon's scripts automatically produce a searchable and browseable website where archival users can search and access summary collection descriptions, full finding aids, digital content (including thumbnail views), creator authorities, and subject terms. The system also provides an inventory tracking/location system, a way to define 'repository level' information, and 'classifications manger' to define the repository's overall arrangement scheme (record groups).

In Archon, collections[1] can be grouped into record groups and subgroups or other classifications defined by your repository.   Data can be imported into the system from CSV (comma separated value), EAD, and MARC files. The systems exports data in MARC and EAD formats. Repositories can build custom websites using easily-modified themes and templates.

This documentation provides an overview of Archon for those creating descriptive records in the

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[1] Given the difficultly of standardizing archival terms among the broad variety of repositories, the term "collection" is used in Archon simply as shorthand, to mean any group of archival records, personal papers, or manuscripts collection managed as a discrete unit by a repository. Archon is flexible enough to be used for organically-related organizational records, manuscript collections, or both. The display of labels in the public interface can be tailored to reflect specific repository needs and terminology.   For more information, see the technical documentation available at the project website.

Administrative Interface. It also provides a technical overview of the software and guidance for archivists or system administrators who will manage a local installation. Specific information about how Archon is implemented at your institution may be available in locally-developed manuals.

1.1   SYSTEM REQUIREMENTS

The interface for creating, editing, and accessing descriptive records uses a standard web browser, with javascript enabled. It has been tested with Internet Explorer 6.0 and higher, Firefox 2 and Opera 8 and higher, on PCs and Macs. It should also work with other browsers and operating systems, since it uses a standard web browser. The public interface is fully xhtml/section 508 compliant.

1.2   SANDBOXES

More information about the system and the Archon project, including an 'Archon Sandbox,' are available at www.archon.org. The 'live' version of UIUC's public data is available at http://www.library.uiuc.edu/archives/archon/, although the Administrative Interface is available only to authorized users.

The end user interface for the 'blank' sandbox provides output using the themes and templates supplied 'out of the box' with Archon. The UIUC sandbox uses the theme UIUC has chosen for its data. Instructions for modifying the output are included in section 7.0 below.

2.0   PUBLIC (END USER) INTERFACE

Archon automatically publishes a website containing collection-level descriptions, full finding aids, and linked digital objects. Regardless of which browser you use to create and edit records, Archon's end-user output can be viewed with any web browser. It will be available in the root folder of your archon installation; e.g. http://www.archon.org/archon/.

2.1   OVERVIEW

The public website can be searched and browsed by name of collection, digital object, creator, subject, and record group (if the "Classification Manager" is used by your repository.)

Search queries can be entered against either collection-level records or the full content of finding aids (including box and folder lists).

[see next page for screenshot].
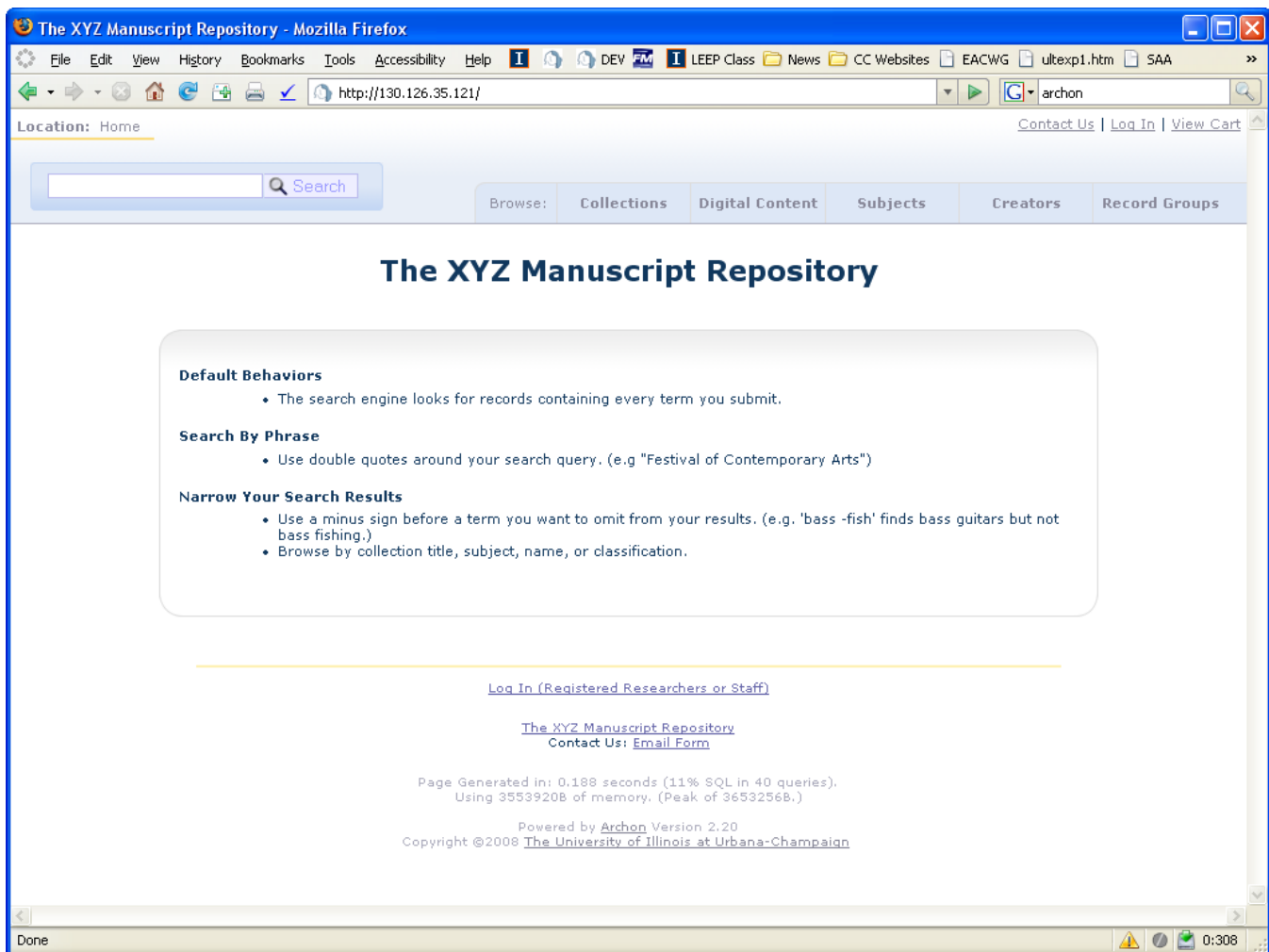
2.2   SEARCH TIPS

- The search engine looks for records containing every term you submit, no matter how small.
- It returns links to collections, digital objects, creator authorities, subject headings, and accession records. The hits are differentiated by category in the results page. An expandable section is provided for each category:
- The following fields are included in the searched through the box on the public interface (this list is not inclusive for all types of information:
    - Collection-Level records
        - Title
        - Description/Scope
        - Identifier
    - Collection Content (i.e. full finding aids, box/folder lists)
        - Title
        - Description
        - User defined filed titles and values

- o Accessions (Accessions are NOT searchable unless public view is enabled for the accession in the accession manager; see section 5.1.2 below.)
  - ▪ Title
  - ▪ Scope
  - ▪ Physical Description
- o Digital Content
  - ▪ Title
  - ▪ Description
  - ▪ Identifier
- o Subject Terms
- o Creators
  - ▪ Name
  - ▪ Biographical/Historical Note
- o Subjects
  - ▪ The text of the subject term
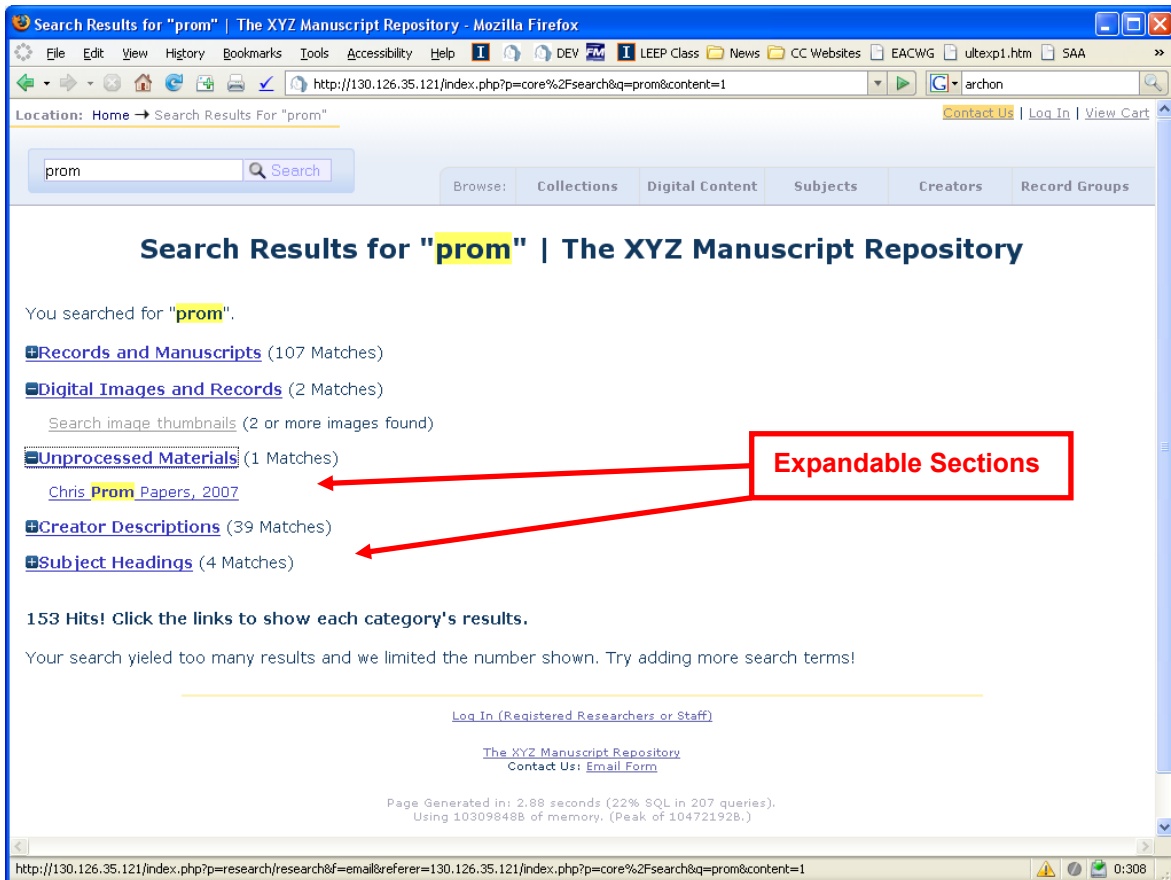
- • Direct access to collection record and digital objects: You can directly access a collection by searching for its full collection or digital object identifier. If you use classifications, the

elements of the classification identifier must be separated by slashes. For example, entering '26/4/1' in the UIUC installation of Archon returns the University of Illinois Archives Alumni File (record group 24, subgroup 4, and series 1).

Version 2.2 includes an integrated thumbnail viewer for digital images:

2.3   FINDING AIDS
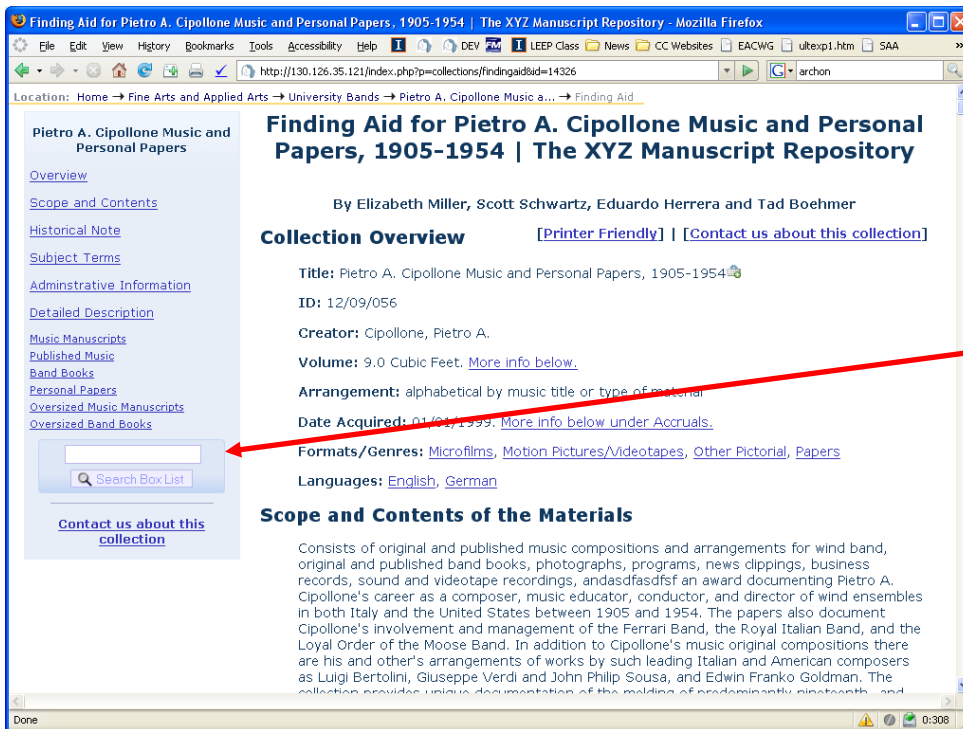
Full finding aids are automatically generated and include a search box for content limited to the current finding aid being displayed.

The left hand navigation/search box stays in a static position on the screen.

2.4   SEARCH BY CLASSIFICATION

Using Archon's Administrative Interface's "Archon Configuration Tab" (see section 4.0 below), you can turn 'search by classification' on or off:

- Search by classification ON:
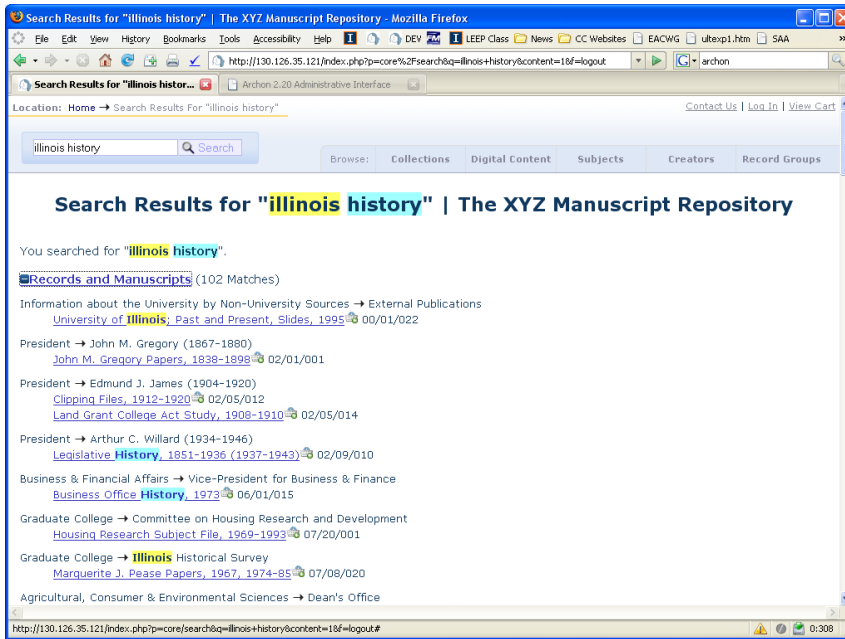
- Search by classification OFF:
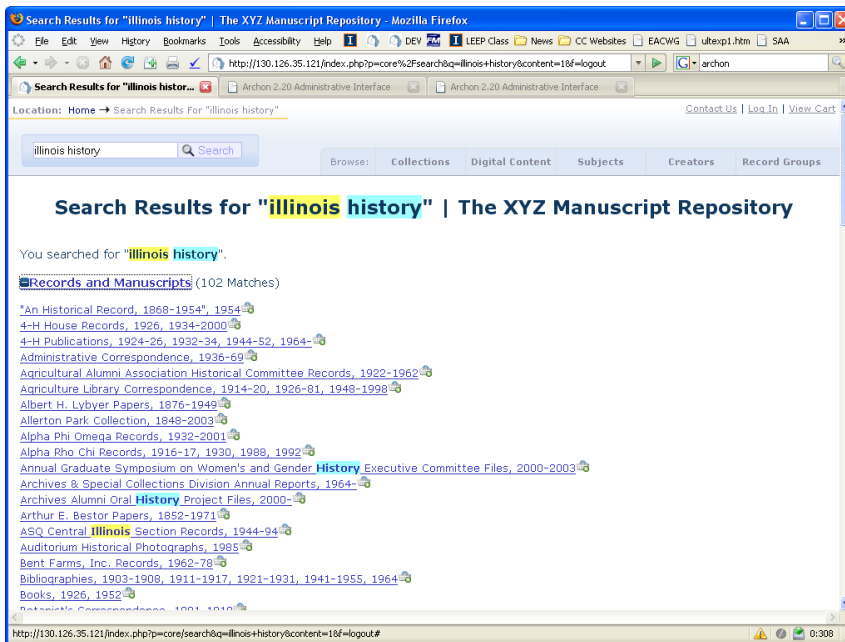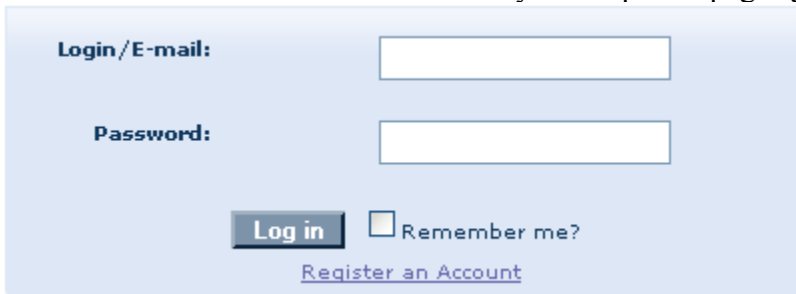
3.0   STAFF (ADMINISTRATIVE) INTERFACE BASICS

Your repository's staff members will use Archon's administrative interface to add new collection and digital object records, modify existing descriptions, and upload or link digital objects. Those who have been provided sufficient authority can also use the administrative interface to add creator and subject authority records and can configure some of Archon's system-wide properties.

3.1   LOGIN INSTRUCTIONS

- Use the form at the bottom of any of the public pages generated by the system.

- After you have logged in, the staff view of the public website will load in your browser. You can edit information by clicking the 'admin' button at the bottom of any web page in the staff view.

To access the administrative interface, click the 'Admin' link in the staff view.

3.2   STAFF VIEWS OF PUBLIC INTERFACE

- You can also edit data by clicking the pencil icons ( ). Once you are logged in, they appear next to collection titles, subject descriptors, creator names, and other editable elements. Clicking them loads the administrative interface in a separate browser window or tab, with the relevant information preloaded for editing.

James B. Reston Papers, 1935-1995 | The XYZ Manuscript Repository

To edit this collection record, click the 'pencil' icons in staff view. A new window or tab will open in editing mode, with the relevant information loaded.

Title: James B. Reston Papers, 1935-1995

ID: 26/20/120

Created by: Reston, James (1909-1995)

- The staff view also shows the actual box locations at which materials are stored, facilitating retrieval by the reference staff. Range, section and shelf locations are not shown in the public

view, but it is possible to add custom public messages by editing the file controlcard.inc.php. See section 7.0 for further information on customizing the public interface

- The staff view also allows you to download EAD and MARC files, for possible importation to other systems.

- For a trip back in time, try the Kardex view. Print them on card stock and systematically file them in a Kardex flip file for in-room reference access—not to mention the ultimate system backup!

3.3   OVERVIEW OF STAFF (ADMINISTRATIVE) INTERFACE

The staff interface is used to add and delete information from the database and to manage all aspects of the system.

- For most features in the staff interface, help buttons ( ) appear in the right hand margin. Clicking the help button will provide further direction regarding the field or feature.
- Depending on the access level granted by your system administrator, some features of the staff interface may not be available, e.g. deleting records, managing the installation of Archon, adding new users, modifying authority records, etc.
- Clicking an item in the top navigation bar will load the selected module.
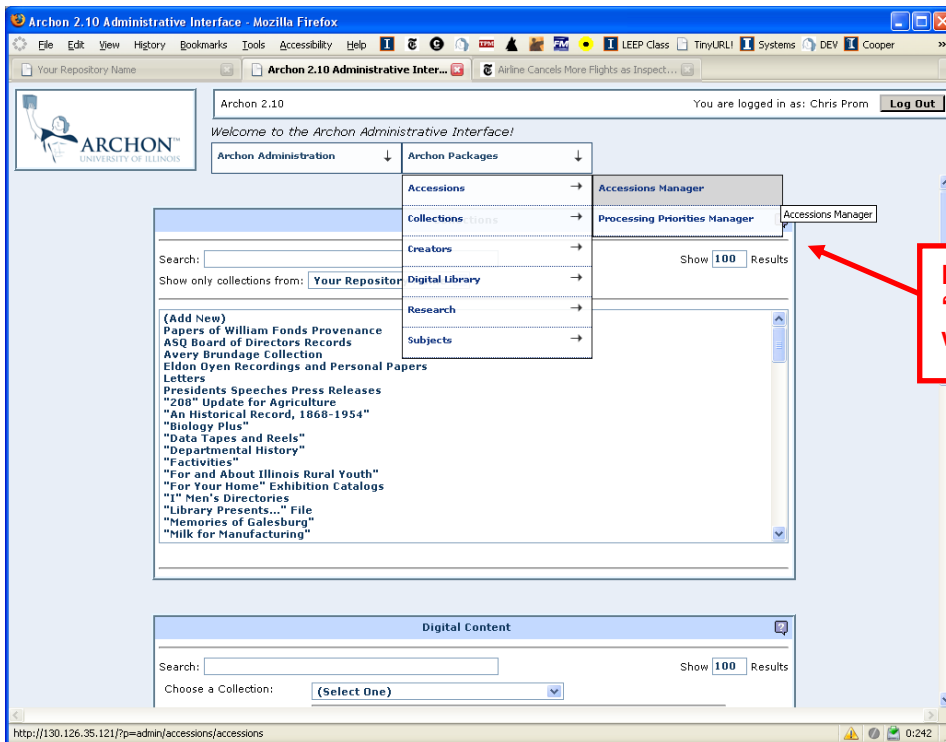
Hover over the menus and click a "manager" to load the module you wish to use.
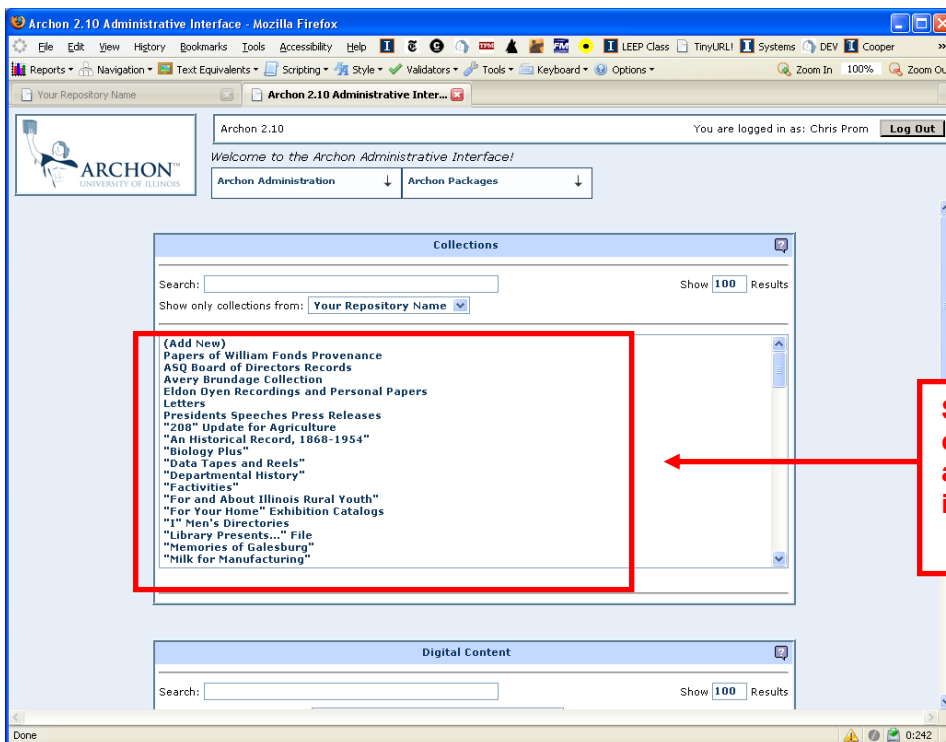
Single-clicking an item in the central selection area will load associated information and cause it to display for editing

- Many areas (e.g. Collection, Accession, Creator and Subject Managers) include a search filter so you do not need to scroll to find information. When you type in the 'search' box or the default field (such as 'name' in the Creator Manager), the items from which you can choose will be

12

automatically be filtered in the box below. (The filtering mechanism may experience a slight delay depending on network traffic; do not hit enter while the list is being filtered.) Once the list has filtered, click any item to load its information for editing, or hit enter to load the first item in the list. If you wish to, you can also scroll the full list, by changing the default "Show X Results" to a higher number.

Typing in the "Search Filter" will reduce long lists to a manageable size. Click a filtered item to select it or apply the appropriate action.

- Generally, you may select and take action on multiple items by using "CTRL-click" and "SHIFT-click" functions with the mouse.
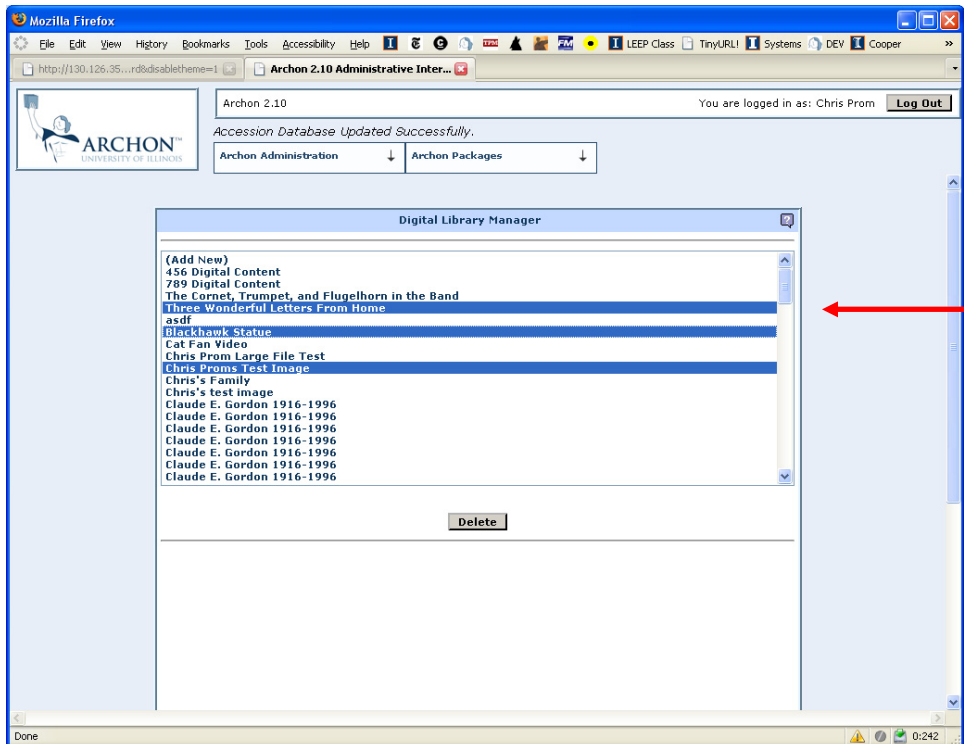
Use "CTRL" or "SHIFT" with mouse click to select and take action on multiple items.

- When you are editing information in Archon, pressing ENTER will **usually** save your changes. If pressing ENTER does not work (i.e. if the screen does not reload when you press enter), then click 'update' or 'add' at the bottom of module or the screen you are using.

3.4   TWO BASIC MODULES

Archon's staff interface contains 2 basic modules, each with several menu items. Depending on the level of access provided by your system administrator, you may not be able to view and/or use some of these functions.

Archon Administration: Includes menu items to manage the database, users, and system. Most of these functions are accessible only to the Archon Administrator or those given administrative access by the Administrator.

Archon Packages: Includes areas to manage the description of archival materials.

Accessions: Enter basic information for recently received materials. Link accessions to one or more existing collections or record groups. Transfer basic accession records into collections records for further editing.

Collections: Create and edit a classification (e.g. record group/subgroup) scheme, collection-level descriptive records, and inventories/finding aids. Track room, range, section, and shelf locations for each collection. Access authority modules as necessary.

Creators: Create and edit creator authority records, which may be linked to classifications, collections, or digital objects. Changes made to creator authority records will automatically propagate to associated collections or digital objects.

Digital Library: Upload digital objects and link them to collections or subordinate parts of collections, e.g. folders. Link subject terms and creator authorities to digital objects.

Research: Manage information related to researcher accounts and appointments established by researchers.

Subjects: Create and edit controlled subject terms, which may be linked to classifications, collections, or digital objects. Changes made to subject terms will automatically propagate to associated collections or digital objects.

4.0   THE "ARCHON ADMINISTRATION" MODULE

4.1   OVERVIEW

The Archon Administration module contains 11 menu items. The menu items allow the Archon Administrator (or those given permissions by the Archon Administrator) to configure Archon, add users, and perform system backups or other tasks. The options discussed below may not appear on the menus

of users who have not been given authority to view or modify the options discussed. More information about most functions is available by reading the help text in each of the areas

4.2   MENU ITEMS AND FUNCTIONS

Note: Some menu items are described in more detail below.

- *About Archon:* Project information and credits.
- *Archon Configuration:* Manage technical aspects of your Archon installation.
- *Database Management***:** Import descriptive records or xml language files (to define new languages in the administrative interface), view technical information about the database, export the entire database for backup purposes, and restore data from a backup files or using a user-defined SQL script.
- *Languages Manger:* Change display order for languages in drop down list, add or delete languages. Archon comes preloaded with languages from the ISO 639-2 alpha-3 standard.
- *Modification Log:* View log listing data modifications (shows data prior to replacement)
- *My Preferences:* Change password, select administrative interface language, and set display order for the user's staff 'homepage.'
- *Package Manager:* Install and uninstall Archon packages (collections, subjects, research, etc.)
- *Phrase Manger:* set and change staff interface labels, error messages, and help texts.
- *Sessions Manager:* Observe user access to the system and delete sessions.
- *User Manager*: Add and delete system users. Provide them a user name, password, and access level. Assign users to groups or use the advanced permissions editor to grant them special permissions.
- *Usergroup Manager*: Assign individuals to a group of users who share a common permission level, create new user groups, and edit permission levels for existing user groups. (Special permissions applied to an individual user in the user manager override settings made here.)

4.3   ARCHON CONFIGURATION AREA

The Archon configuration options are used to control basic properties of the Archon system, such as themes and system wide default values. Many of the fields are self-explanatory. Additional information is provided here for the following fields:

- *Default Language:* Specifies the language used in the administrative interface and certain phrases used in the public interface. (If a non-English language is chosen for public phrases, the default theme will need to be modified to add additional non-English terms.) For the administrative interface, individual users can override this setting under "My Preferences". Currently, language files have been defined for English and Spanish. French may be added to the release in the near future.
- *Default theme:* Specifies which theme will be used to style the public output. For particular pages or groups of pages, a theme can be overridden by using the following syntax in the url "settheme=themename'

- *Search Box Lists:* If this value is set to no, 'collection content' eg box and folder lists will not be included in search results. When this value is set to no, searching of collection content can be provided by setting the value of a checkbox named 'content' equal to '1'. For example:

UIUC Archives → Holdings → Search F

assembly Search
☑ Include Box Lists | Search PDFs

```
<input type="checkbox"
name="content"
value="1" checked>
```

> **IMPORTANT: The method provided above works only in the default theme. If you develop a new theme, you will need to include code in your search form similar to that in lines 169 to 174 of the file header.inc.php in the default theme (except you will use a checkbox, not a hidden input field).**

- *Search by Classification*: If set to yes, search results for collections will be ordered by record group in the public interface and record group headers will be provided for each set of results. If set to no, search results for collections will be provided in an alphabetical list, using the value of the 'sort title' field.

4.4   DATABASE MANAGEMENT

The database management area is used to import and export information from the system, to backup the database, and to view information related to the source archon databases in MYSQL or SQL Server.

For each type of information to be imported, a script is defined in the 'db' folder of the appropriate package on the webserver. For example, EAD files are imported using the logic specified in the file \packages\collections\db\import-ead.inc.php.

For any CSV (comma separted values) files to import, a Microsoft excel template is provided in the 'incoming' folder on the webserver. Excel files, including the samples provided in this directory, cannot be imported directly into Archon. They must be saved as comma separated value (CSV) files first. There MUST NOT be a header line included in the comma separated value file, so if excel saves the header line, delete it from the csv file before attempting to import the files

- Accessions information in CSV format.
- Collections information in CSV format.
- Collection content (e.g. series, subseries, box, folder and item listing). See directions in CSV sample file.
- EAD—most EAD files will import correctly, either singly or as multiple EAD's in a zipped file. However, it is impossible to write a single script that will import every EAD instance. Therefore, if your EAD file will not import, please examine the structure of your EAD file and/or tweak the import script that is found in packages/collections/db. In particular, we note that EAD files which contain non numeric values or ranges of values in the <container> element

will not import correctly, since Archon requires a numeric value for each piece of content to properly display and sort results.

- MARC in standard MARC format (not MARCXML).
- Phrase XML: Archon uses a native 'phrase' format to define field labels, messages, and help button texts in the administrative interface, as well as certain display fields in the public interface. If you wish to add support for a new language, translate the existing text in the files contained in the 'install/phrasexml' folder for each of the archon packages, then import the phrases using the import tool. **If you define new language files, please send them to the Archon project staff, so that we can review them for possible inclusion in future releases of the software.**
- Archon SQL: import an SQL file previously exported from Archon using the Archon syntax. Use of this as a backup and transfer mechanism is only recommended for small database and/or those not containing digital content.

4.4.1 Fix Image Preview Script

The Fix Previews script in the Digital Library package corrects for an error present in Archon versions 1.00 through 2.02. Images stored using versions 1.0 to 2.02 of Archon may require more time and bandwidth to load in the image thumbnail page new to Archon 2.20.

If you have images in your database that were stored using early versions of Archon, you may wish to run this script in order to correct the size of your stored image thumbnails. Please note that it may take a very long time to run depending upon the speed of your web server and the number of images stored in your database. Also, your server's memory limit should be set at least as high as was necessary to store the images in the first place.

The script will attempt to go through all images automatically, but it may be necessary to press the "Continue ->" button at times if Archon detects an error during storage. The script will not automatically continue when there is an error so administrators may take note of which files are presenting a problem so they may be dealt with manually later.

Again, this only corrects errors in images stored in versions before Archon 2.10. If you have recently installed Archon or have only used the digital library since version 2.10, , running this script will not be useful.

4.5   PHRASE MANAGER AREA

The Phrase manager is used to edit the text associated with labels, help buttons, and messages in the administrative interface, as well as the value of certain textual elements in the public interface. There are several types of phrases which may be edited.

4.5.1   Overview of Phrase Manager

[see next page for screenshot]

17

Phrase Manager

(Add New)
administrativeinterface
administrativeuifunction
administrativewidget
allarguments
aprcode
array
character
child
class
code
configuration
consensusvariable
databaseimportutility
databaseversion
displayname
displayorder
fields
function

Delete

Package: (Select One)
Archon Module: (None)
Language: (Select One)
Phrase Name:
Phrase Value:

Regular Expression:
Phrase Type: (Select One)

Add

Typing in the phrase name field will filter long lists.

Administrative Phrase: Field labels in admin interface.
Description: help button texts and expanded field information
Message: error and other messages sent in response when a form is submitted. See nouns for explanation of $1 syntax used in certain error messages.
Nouns: used in error messages and warnings. Are referenced in messages with $1, $2, etc. syntax message phrases.
Public Phrase: information on public pages of archon. See below for more information.

4.5.2   Editing Public Phrases

[see next page for screenshot]

18

Leave the other drop down menus unselected and select "Public Phrase" under "Phrase Type."

Then select the value you wish to edit or type in the search box to filter the list if necessary. Some experimentation may be necessary to find the phrase you wish to edit.

4.5.3 Editing Field Labels and Help Button Messages

Select the package and/or module in which you wish to edit a help text. Then type in the phrase name box to filter the list, if necessary. Some experimentation may be necessary, but the phrase name typically is similar to the English version of the filed name. For example, this dialog shows the user editing the value of the help button text for the description/scope field in the collections manager.

5.0 THE "ARCHON PACKAGES" MODULE

The Archon Packages module is used to access the most common staff functions in Archon, such as editing collection descriptions and finding aids, managing digital objects, and defining controlled vocabularies or creator authorities. Depending on which packages have been installed and are permitted to use, the menu options described in sections 5.1 to 5.6 may or may not appear when you are logged in.

5.1 ACCESSIONS PACKAGE

NOTE: Installation and use of the Accessions Package requires installation and use of the Collections Package.

The accessions area is used to record basic descriptive information about recently received and/or unprocessed materials. Accessions can entered, edited, and linked to existing classification (record group) or collection records. Processing priorities can be set and room/shelf locations may be recorded. When the collection is ready to process, basic accession information can be transferred into a new collection record in the Collections Manager.

The accessions area includes two modules: Accessions Manager and Processing Priorities Manager.

5.1.2 Accessions Manager

Click "Add New" to record basic information about newly-received materials, or double click an existing record to edit its content. Information will load in the content area below. Use help buttons for content-sensitive help.

Use this button to create a skeletal collection record; the Collection Manager will open with information pre-loaded for editing. The accession record will not be affected.
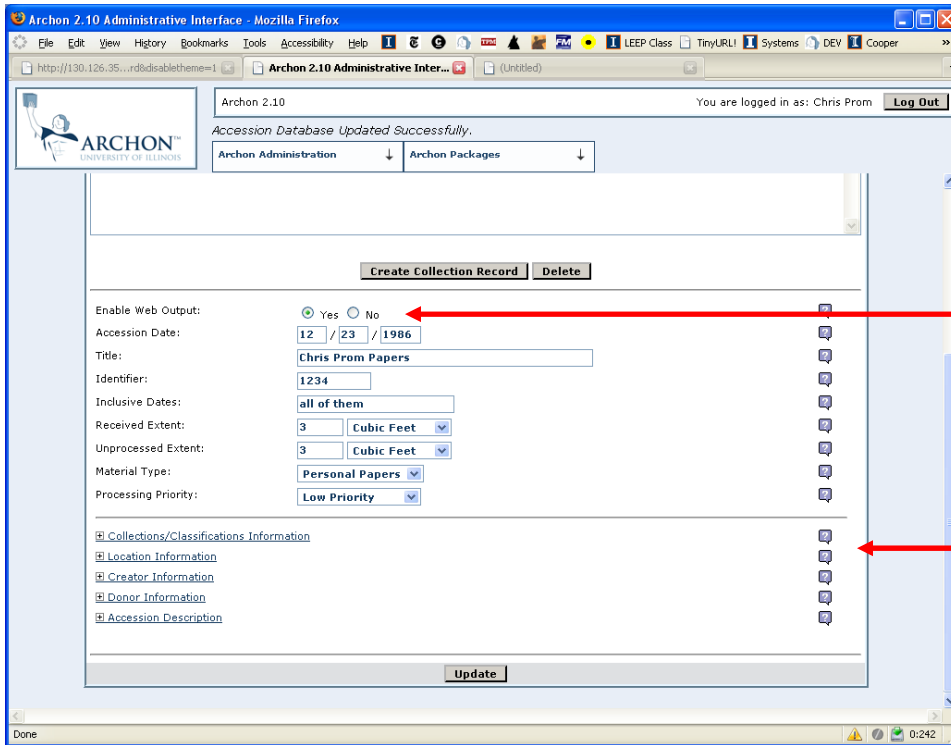
Setting this value to NO will disable all public output for this particular accession ONLY.

Additional information may be provided in the expandable areas that appear below the basic information.

Collection/Classification Information is used to specify processed collections and/or classifications to which the newly-accessioned or unprocessed materials relate. For example, the accession shown below is associated with the Departmental Services subgroup in the Library subgroup. (See section 5.2.2 for information about defining a classification system.)

An accession can be associated with zero or more collections/classifications, but the first one listed is the primary association.

Click "associate a collection" to browse the Collection list, or browse for the appropriate record group/subgroup.

[continue to next page]

5.1.2 Processing Priorities Manager
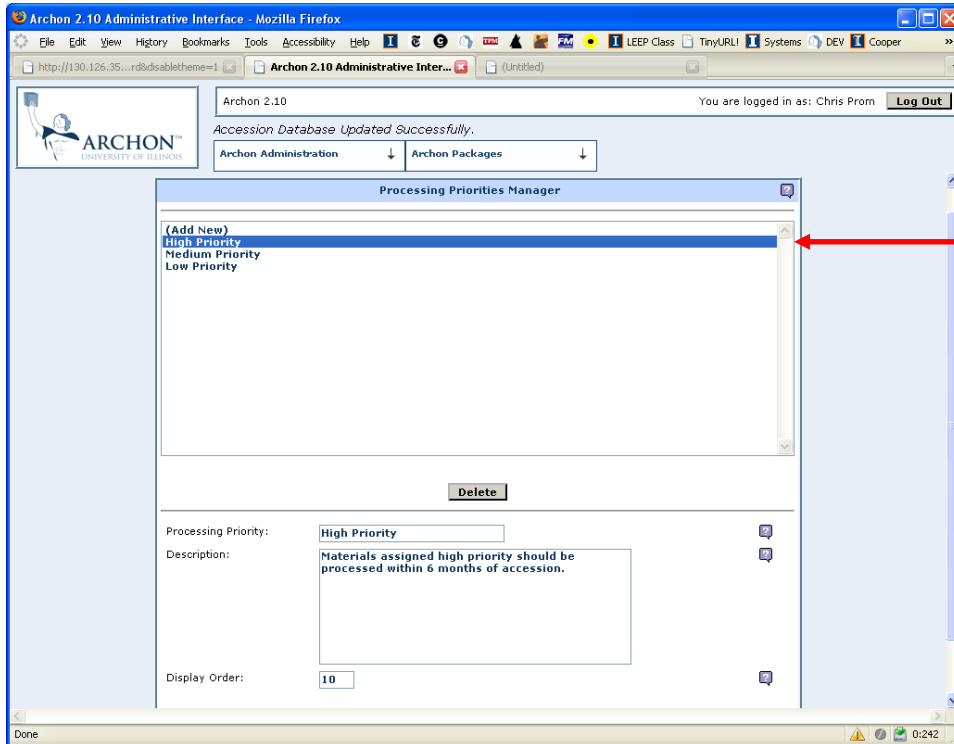
The values set in the processing priorities manager determine the options available under the drop-down list in the accession manager.

5.2 COLLECTIONS PACKAGE

5.2.1 Menu Items and Functions

The collections area is used to record descriptive and management information (such as the collection description, shelf locations and acquisition information) about collections. It also includes an area to create and edit a classification scheme (e.g. record groups/subgroups).

The collections area contains seven modules and one sub-module: Classification Manager, Collections Manager (includes Content Manager sub-module), Extent Units Manager, Level/Container Manager, Location Manager, Material Types Manager, and Repository Manager.

5.2.2 Classification Manager

The Classification Manager is used to create or edit provenance-based classifications, e.g. record groups, subgroups or fonds, at as few or as many levels as required by the repository. Once record groups have been defined, individual collections may be linked to a record group in the 'collections manager.'

NOTE: Use of the Classification Manager is optional. It may not be available depending on the level of access provided by your system administrator.

Classification Manager

Current Level:

» [root]
    [15 Liberal Arts and Sciences]

Classification under [15 Liberal Arts and Sciences]:

(Add New)
01 Dean's Office
02 Anthropology Department
03 Astronomy Department
04 Plant Biology Department
05 School of Chemical Sciences
06 Classics Department
07 English Department
08 Entomology Department
09 French Department
10 Geography Department
11 Geology Department
12 Germanic Languages and Literature Department
13 History Department
14 Mathematics Department
15 Microbiology Department
16 Philosophy Department
17 Physiology and Biophysics Department
18 Political Science Department

Transfer   Delete

Number: 11
Title: Geology Department
Current Creator: Geology Department
Apply a creator: Search Filter:

All Creators:
University of Illinois at Urb...
"I" Men's Association
Abbott, W.
Abbott, William Lamont
Abraham Lincoln School of Medi...
Abramovitz, Max
Abrams, Samuel
Academic Development
Accountancy Department
Accounting Division

Apply Creator

This screenshot shows the Classification Manager being used to define new subgroups under an existing record group.

The selection area show current 'nesting' of subgroups within the master record group that is shown under the 'root' at the top of the screen

Existing classifications can be renumbered or moved to a new record group. All associated collections will be renumbered and moved with them.

Use this section to 'link' the classification to an associated creator authority file. A historical note regarding the unit can be provided in the linked creator authority, which is edited via the 'Creator Manager'.

If necessary, classifications can be 'transferred' to another 'location' in the classification hierarchy. This feature is useful if, for example, you wish to update your record groups/subgroups to reflect changes in the administrative structure of your parent institution. When a classification is transferred, all associated collection records will be automatically transferred with it.

Optionally, each classification or its child classifications can be linked to an authority-controlled creator record which contains a biographical or historical note and other information about the creator of the records described in the classification. Use the search filter to select and apply a creator record to the subgroup, or launch the creator manager to create a new creator record.

5.2.3   Collections Manager

The Collections Manager is used to create and edit collection records.
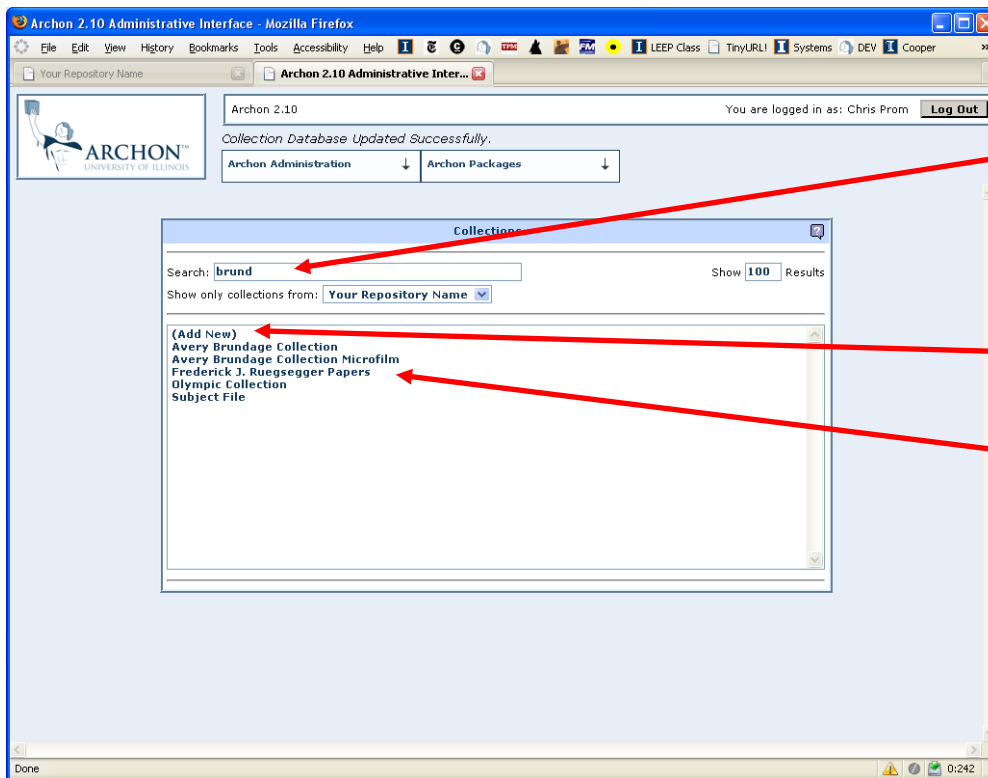
5.2.3.1 Filtering Records: Type any part of the title of the collection or the classification number (with each part of the number separated by slashes: 'x/y/z') to identify the collection you wish to edit. If multiple repositories are managed in one system, you can limit the search result to one repository of desired. Once the results have been filtered, click the appropriate title to load the record for editing

5.2.3.2 Adding New Collections. Add a new collection by clicking "Add New" on the first line of the selection area.

5.2.3.3 Editing Collection-Level Information. Most of the fields requested are self-explanatory. Please note the following.

[continue to next page]

Click this to create a full finding aid, see below for more details.

If 'no' is checked, the collection will not be shown to end users on the website.

Use pull down menus to assign the collection to its proper home in the record group/subgroup system.

'Template' controls the way in which the finding aid is displayed in the public website. Normally should be set to 'system default.'

Enable Web Output: If 'no' is checked, the collection will not be shown to end users on the website

Main Repository: If multiple repositories are defined, assign the collection to the appropriate repository.

Collection Classification: If your repository or repositories use classifications (e.g. record group and/or subgroups), use pull-down menus to assign the collection to its proper 'home' in the classification system.

Collection Identifier: Can be numeric or alpha or alphanumeric. If you choose to complete this field, you MUST use a unique value. (If using classifications, the identifiers from the classification system are inherited by the 'collection identifier' to comprise a unique multipart ID.)

Type of Materials: Indicate the basic archival type of materials, e.g. official records or personal papers. If necessary, new types can be defined in the 'Material Type Manager.'

Template: Select the template by which information for this collection should be presented to the user. Normally you should leave this value set to the default established by your system administrator.

5.2.3.4 Collection-level sub-menus: Click any of the headings to expand or contract the information associated area:

Click any of the headings (such as 'Location Information' or 'Collection Description') to edit the associated section of the collection record.

Location Information. Track container locations by entering container identifiers or ranges of identifiers in content field. Select a main location, i.e. room or building, from the pull down menu. Once a main location has been assigned, you can (optionally) specify the range, section and shelf locations to give a more precise location. You may also optionally include extent information for the materials in that location. The blank top line is used to add new location records.

Record room location

Record range, section, and/or shelf

Record Extent

Click a button to delete only the associated row

Click 'Update' after making changes to any or all rows.

Click this link to define a new location (i.e. room)

If you need to edit or add a room location, launch the Location Manager. (The Location Manager may not be available to all uses, based on access level provided by your system administrator.)

IMPORTANT: When adding or editing locations, you must click the 'Update' button at the bottom of the location manager section, not at the bottom of the HTML page, in order to save your changes.

Creator Information: The left-hand box contains a list of all authority-controlled creators in your vocabulary. To filter the list, type any portion of the creator's name in the 'search' box. When you see the entry you wish to apply, double-click the entry to apply it to the collection. It will move to the right-hand box. The first creator listed in the right-hand box is considered the primary creator of the collection.

Type a value here to filter the authority list and locate the creator you wish to apply.

Apply a creator authority with the arrows or by double clicking.

Click 'Launch Creator Manager' to create new creator authority records.

If the creator you wish to apply is not in the authority list or if you need to edit an existing creator's information (such as dates or biographical note), you will need to add an authority record before applying it to the collection. Click 'Launch Creator Manager' to edit an existing creator authority or create a new record.

Collection Description: Enter a scope/content, and arrangement alternate extent statement note, at any length desired. Use the ENTER key to separate paragraphs.

Subjects: Apply controlled subject terms to the collection. The left box contains a list of all authority-controlled subjects currently available. Type in the search box to filter the list, then double-click an entry to apply it to the collection. It will move to the right hand box.

Multipart terms (such as Afghanistan – History and Geography – 19 century) can be applied to collections either at the most general level or any level of granularity required.

If you need to add a subject to the list of controlled term or edit information for an existing subject term, launch the Subject/Genre Manager.

Genres: Uses an interface similar to that for subjects to list the genres or forms of material included in the collection, e.g. diaries, photographs, etc. Define new genres using the Subject/Genre manager. Genres can also be linked through the subjects section of the Collection Manager, since they are considered subjects of the type 'genre/form of material'.

Languages: Uses an interface similar to that for subjects to specify the languages of the materials in the collection.

Restrictions: All fields are self-explanatory and map to the appropriate fields in MARC and EAD. Use the ENTER key to separate paragraphs.

Acquisition Information: All fields are self-explanatory and map to the appropriate fields in MARC and EAD. Use the ENTER key to separate paragraphs.

Related Materials Information: All fields are self-explanatory and map to the appropriate fields in MARC and EAD. Use the ENTER key to separate paragraphs.

Other information: Use of these optional fields will be defined by institutional policy.   Use the ENTER key to separate paragraphs.

In the default theme, the 'other URL' field is mapped to display as a link to an external finding aid. This provides a way to link to inventories that have not been imported to Archon, such as a PDF or HTML document.

Finding aid information: Record dates of publication, author, etc. of the collection description.

5.2.4   Content Manager

The content manager is used to describe subordinate parts of collections and to create box and folder lists. The content manager allows you to define series, subseries, boxes, folders, or items within each collection. Additional levels of description and container types can be defined using the level/container manager.
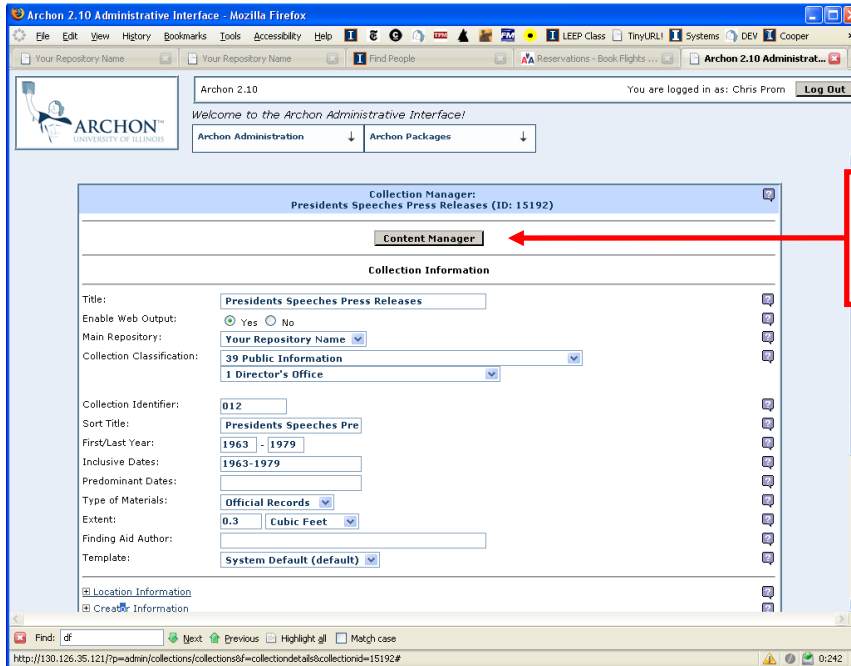
[continue to next page]

29

5.2.4.1 Basic Interface

Additional information on each element in the Content Manager interface is provided below.

5.2.4.2 Content hierarchy/tree: The indented levels at the top of the content manager provide a visual clue as to your current 'location' in the descriptive tree. This sample shows a user at the top level of the Cipollone Music and Personal Papers, ready to add a series or edit an existing series.

5.2.4.3 Current Levels/Containers available for editing

- **Click (add new) and enter information in the boxes below** to add content at this level.
  - **Single-click** to load a row for editing.
  - **Double click** a row to list/edit its children or to add a new child

- **'CTRL-click' or 'SHIFT-click' to select multiple rows.** Then delete, renumber, or transfer to a different level in hierarchy

5.2.4.4 Main fields available for editing:

Entering ranges and comma-separated lists will add multiple children

Level/Container: Use the 'level/container' pull-down box to select either the level of description or the physical container you wish to apply. In the default installation, 'box' functions in Archon only as a physical container and is used to mark the accidental division, within and across intellectual divisions, into which materials are physically stored. Series, sub-series, folder/files or item recorded as children of a particular box will have the parent box number assigned to them.

Consistent application of the levels and containers will allow your repository to keep the intellectual order of a collection separate from the physical order. In other words, multiple series, subseries, files, items, etc. can be contained in one box. (Archon will automatically export the information correctly in the end-user interface and the EAD output, assigning container elements and level attributes in the <c0x> elements.)

'File/Folder' functions as both a physical container and an intellectual level, mirroring typical practice. It is mapped to the intellectual level of file and has an EAD level attribute of 'file'.

Entering a single numeric value will add a single child 'underneath' the parent level or container. Adding a range of values, a comma separated list of values, or any combination of ranges and comma-separated lists will add multiple children, each including the title, dates, scope note and user-defined fields defined in the space below the date field.

Title: Provide a title for the series, folder, item, or other level of arrangement being described. The value provided here will map to the <unittitle> element in the EAD output and be indented to the proper level of description in the HTML output. Do not include a trailing comma if dates will be included in the dates field.

Date(s): Enter a single date or date range in any format. It is mapped to <unitdate> field in EAD output and appended after the title in the EAD output, in this format: Title, date. A comma is automatically inserted between the title and dates.

Description: This field maps to the <scopecontent> element in EAD and will be output in the finding aid as a paragraph following the title and dates

5.2.4.5 User-Defined Fields

Data recorded in the 'Label/Head' field maps to the label attribute or <head> element in EAD for the field type selected, as appropriate.   An EAD field type **must** be selected, and the content of the field will be mapped into the appropriate EAD element.

5.2.4.6 Batch Transfer, Deletion, and Renumbering
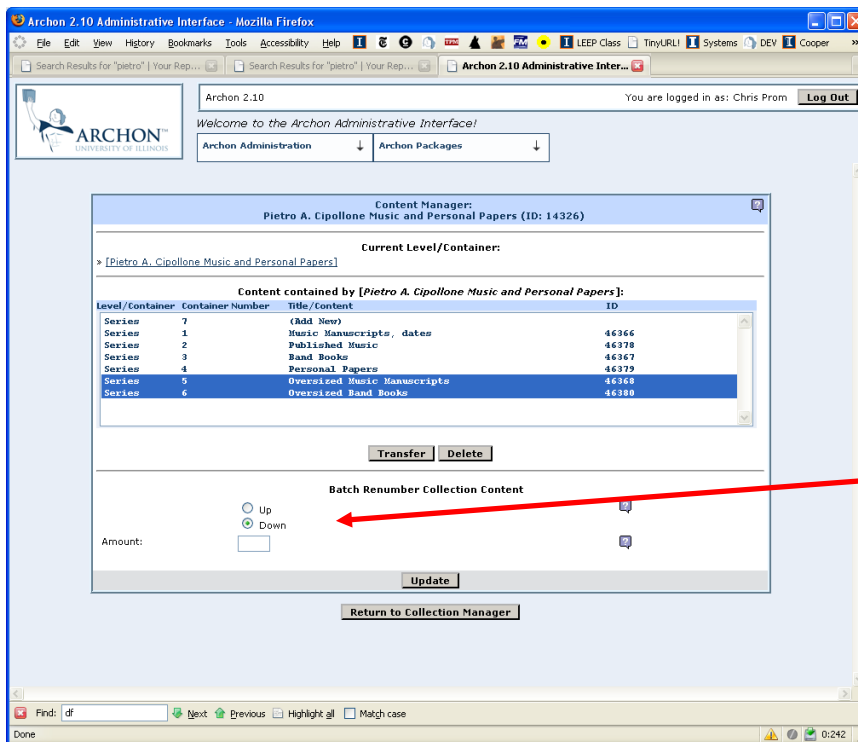
5.2.5 Extent Units Manager
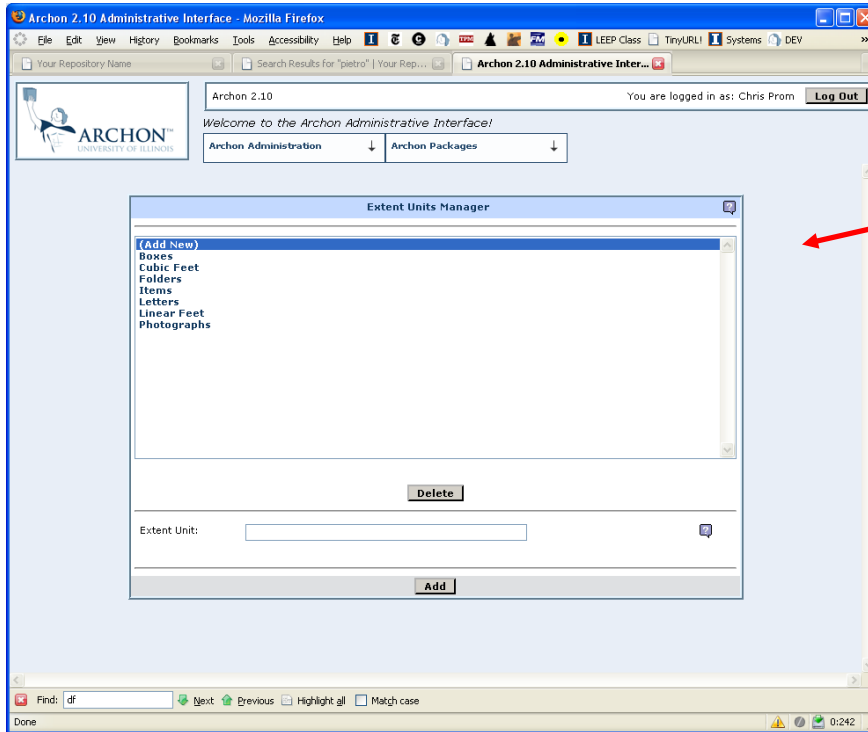
The Extent Units Manager is used to list the values under the drop-down list for extent in the Collection Manager.

5.2.6 Level/Container Manager

The Level/Container Manger is used to define the Levels of Description and types of containers that will be available for selection under the "Level/Container" drop-down box in the Content Manager. Provide a name for each level or container type and specify whether it should function as an intellectual level of description, a physical container, or both. **NOTE:** It is strongly recommended that you retain the 'default values for series, subseries, box, folder and item. These specifications will are used to determine the nesting and output of the appropriate elements and attributes in the EAD output.

If the "intellectual" checkbox is checked, you MUST specify an EAD level to which the level of arrangement corresponds. The value in the 'EAD Level' field will be output as the level attribute whenever the indicated level is used in the content manager. "otherlevel" is not currently supported.

 [continue to next page]
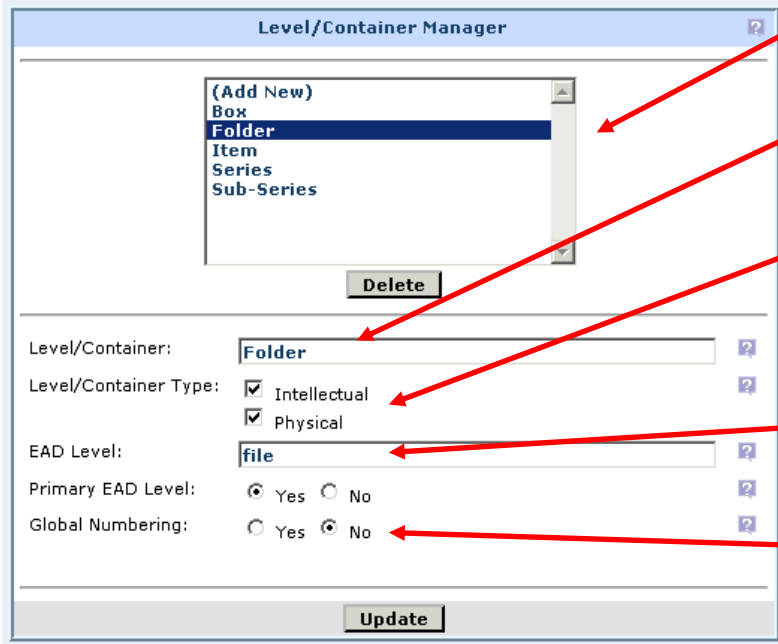
Shows all current levels or containers currently defined.

Name of level or container currently being edited.

Check one or both boxes as appropriate. Checking 'physical' will insert a container element in the EAD output whenever this level is used.

You MUST specify an EAD level if 'Intellectual' is checked; value is mapped to level attribute on <c0x> element whenever this level is used

Checking 'no' causes the default numbers suggested in the content manager to restart at 0 when the level is used across multiple parents or children.

5.2.7 Location Manager
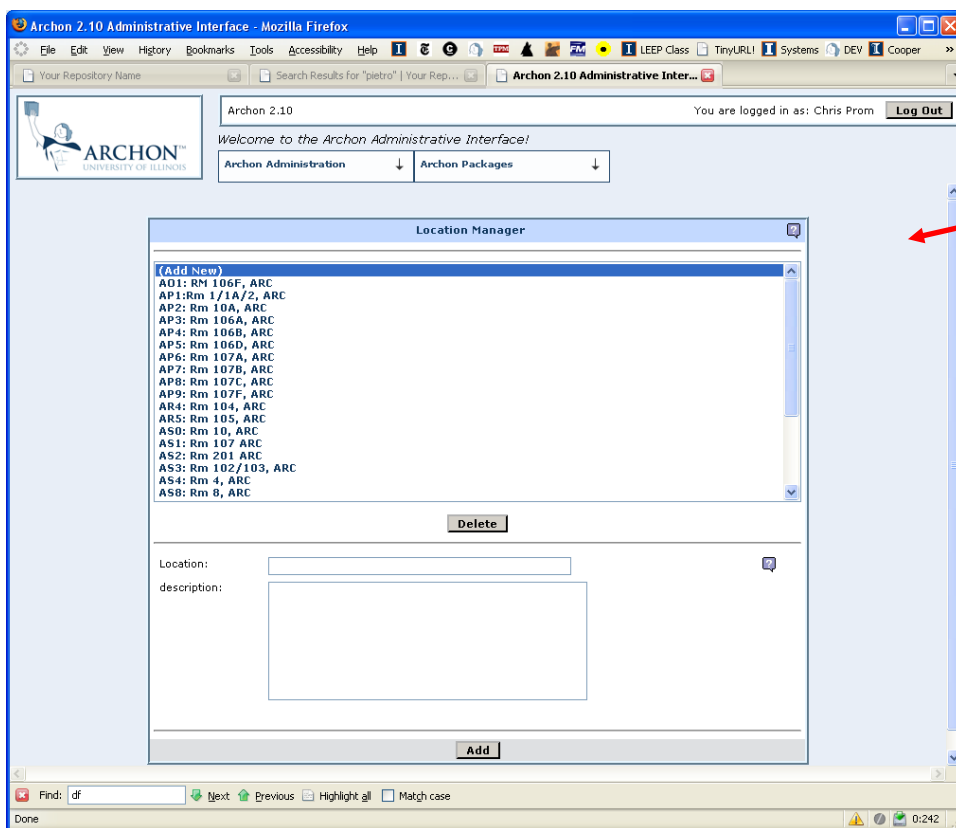
The Location Manager is used to define the rooms, buildings, or 'locations' in which collections are stored. *Warning:* Deleting a location WILL delete all associated location records from the collections to which they are applied. (This power is restricted to the Archon Administrator in the default installation.)

5.2.8   Materials Types Manager

The Material Types Manager is used to define the basic types materials that are held in your repository, e.g. personal papers, official records, or manuscript collections.

5.2.9   Repository Manager

Record the basic identifying information specific to your repository. To ensure interoperability, the identification code MUST be taken from the MARC Code List for Organizations.

5.3   CREATORS PACKAGE

The creator manager is used to add and edit creator authority records, which may then be applied to classifications, collections, and digital library items, as described in sections 5.2.2, 5.2.3.4 and 5.4.1.

If you wish to edit an existing creator record, select a creator from the list or begin typing to filter the list, then select the record you wish to edit.

Creator records created here can be applied to either an individual collection or a classification heading (e.g. record group or subgroup to create agency histories.)

In the biographical/historical note and sources field, use ENTER to separate paragraphs.

Simple HTML can be used. It will be stripped out before the information is output in EAD or MARC format.

5.4   DIGITAL LIBRARY PACKAGE

The digital library is used to link to external digital objects and to directly upload digital objects and electronic records into the system. Linked or uploaded objects can be associated with individual collections or any subordinate parts of a collection (e.g. series, items, files) which have been entered. Hyperlinks between the digital object and the associated collection automatically appear in the public website.   **NOTE:** The digital library is not intended to function as a digital preservation system.

5.4.1   Digital Library Manager

The Digital Library Manager is used to associate individual digital objects (e.g. photos, sound clips, and electronic records) with a collection and create basic metadata about the digital objects. After you enter the Digital Library Manager, pick a collection to which the object is associated (the collection will be pre-selected if you enter directly from the content manager).

Adding a New Digital Object
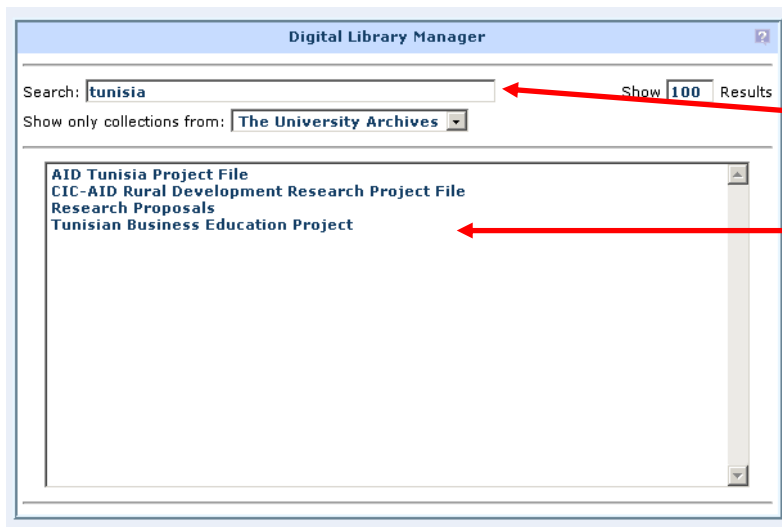
Use the initial screen to select the collection to which a digital object will be linked.

Typing in the 'search' box will filter the list of collections

Click one of the filtered collections to select it and begin the process of linking a digital object

Once a collection has been selected, you will be presented with the screen shown on the next page.

[continue to next page]

36

This box shows existing digital content (if any) linked to the collection. Add a new item or click an existing item to upload a digital object, to provide additional metadata, or link to an external resource.

Use these fields to enter basic information for each digital object or resource.

Shows the collection and (optionally) series, boxes, files or items with which the object is associated.

IMPORTANT: You must provide a title BEFORE linking to a resource, uploading a digital object, or providing advanced metadata.

Adding Detailed Metadata

After a basic record has been created, you can edit the record, link to a digital resource, or directly upload a file or files, by clicking the title in the list. You will then be presented with the following options.

Use this field to link to an external resource

Open this section to upload a file or files

Use of these sections is optional; creators, subject and languages are drawn from the controlled list and work exactly like they do under the Collection Manager.

Upload dialog. A non-unique title is required

Add files for a compound object using the 'Upload Files' area.

5.4.1 File Types Manager

37

The File Types Manager is used to define the types of files that may be uploaded into Archon. (The File Types Manager may not be available to all users, depending on the level of access provided by the Archon Administrator.)

5.5 RESEARCH PACKAGE

The research package is used to manage information related to researcher logins/accounts and appointments.

If the research package is installed, users can register accounts, place collections, series, folders and items into a virtual cart, email the list to the archives, and establish appointment times. The menus in this area allow the Archon administrator to view and edit information related to researcher accounts, carts, and logins. It includes the following areas.

5.5.1 Appointment Purposes Manager:

Define values that will appear to users in a drop down menu asking the purpose of their appointment.

5.5.2 Appointments Manager

View and edit information submitted by users relating to their appointments, including arrival times, comments, and lists of requested items. Mark boxes and folders and removed or returned from storage locations.

5.5.3 Researcher Account Manager

View and edit information relating to user-generated accounts, including names and contact information.

5.5.4 Researcher Type Manager:

View and edit a controlled list of 'researcher types.'

5.6 SUBJECTS PACKAGE

The subjects module is used to add and edit terms that will be available as a controlled vocabulary in the collections and digital library managers.

You can create multi-part terms. Each component of the multipart term must have a subject type applied to it. If the multipart term is LCSH compliant, mark it so at any level of faceting where it is compliant.

The terms created in the subject module can be applied to collection or digital objects. 'Parent' terms with 'children' can be applied to collections either as an multipart terms or at any level of specificity desired.

Subject terms are mapped into MARC and EAD records with the proper field names/subfield indicators, and elements/attributes, as applicable.

5.6.1   Subject/Genre Manager

Subject/Genre Manager

Current Level:

» [root]
    » [Union of Soviet Socialist Republics]

Subjects under [Union of Soviet Socialist Republics]:

(Add New)
Agriculture and Natural Resources
Art and Literature
Business and Industry
Education
History and Geography
Politics and Government
Religion and Sociology
Science and Technology
Sports and Recreation

[Transfer] [Delete]

Subject: Agriculture and Natural Resou

Subject Type: Topical Term

Subject Source: (Select One)

[Update]

Create a multipart subject heading by double-clicking the heading and adding a facet. The hierarchy is shown at the top; all of its children are below.

Apply a subject type to each part of the multipart term.

If the multipart term is LCSH compliant with LCSH or another vocabulary, mark it so at all level in the hierarchy.

Multi-part terms can be created to any level of depth. In practice 2 or 3 levels should be sufficient for must uses.

5.6.2   Subject Sources Manager

Subject Sources Manager

(Add New)
Art & Architecture Thesaurus
Library of Congress Name Authority File
Library of Congress Subject Heading

[Delete]

Subject Source: Library of Congress Subject Heading

EAD Source: lcsh

[Update]

Use to list the source for the subject vocabulary.

Whenever subjects or genres in this vocabulary are applied, the value listed here will map to the 'source' attribute and appropriate indicator in EAD and MARC output, respectively.

5.6.3 Subject Types Manager

Use to list the source for the subject vocabulary.

Whenever subjects or genres in this vocabulary are applied, the value listed here will maps to 'source' attribute and appropriate indicator in EAD and MARC output, respectively.

6.0   SYSTEM INSTALLATION, CONFIGURATION, AND MANAGEMENT

6.1   INSTALLATION REQUIREMENTS

The interface for accessing and editing descriptive records uses a standard web browser, with JavaScript enabled. It has been tested with Internet Explorer 6 and 7, Firefox 2, Safari, and Opera 8 and higher, on PC and Mac Linux desktops.   It should also work with other browsers and operating systems.

Archon itself requires both a webserver and a database server (either MySQL or Microsoft SQL server). Specifically, you need the following in place before running the install packet. If you do not understand any of these requirements, check with your web host or systems administrator.

- A standard installation of MySQL or Microsoft SQL Server. We have tested the application with MySQL 5.0 and SQL Server 7 and 2000, but it should work with later releases of these platforms as well.
- A blank database on the database server. When creating the database, create a user with full (owner) privileges. You do not need to specify any table names, data definitions, or the like. They will be created or updated automatically when you run the install packet.
- A web server of any type with PHP 5.0 or higher installed. Depending on which

database server you plan to use, the mysql or mssql libraries must be enabled. The gd library must be enabled if you plan to use the Digital Library Manager. Also, the zip library can be installed. This will allow zip files to be used by the import utilities.

It is possible to install Archon to a local machine that serves as both the webserver and the database server.

6.2   INSTALLING/UPGRADING OVERVIEW

A single installation/upgrade packet is provided for Archon 2.1. It is available through the download page on the project website, www.archon.org.

In order for the installer to work correctly, you MUST provide the install pack sufficient information and permissions so that it can:
- Establish a connection to the MySQL or SQL Server where the Archon data will be stored. You must provide an accurate server address, database name, login, and passwords, as requested during the install routine. The files install.pdf and install.doc that are provided with the install pack specify exactly which information is needed.
- Upload files to the webserver. The files may be uploaded either using FTP or a shared drive.

If your attempt to install Archon fails, please check with project staff, your local system administrator, or your web host, as needed, to ensure that the information you are supplying is correct.

It is also possible to install Archon manually. To do this, copy all the files in the zip file to a webserver, define the server address, database name, login, etc in config.inc.php in the archon root, then load the base URL of your archon website in your web browser.

6.3   INSTALLATION INSTRUCTIONS

Installation and upgrade are handled using the same packet, but the instructions provided in this section (1.2) are for those installing Archon for the first time, not for those upgrading from a prior version. See section 6.4 for instructions to upgrade from a prior version.

Step One: Prepare to Install Archon
Download the zip file from the project website. Save the file on a local drive.

Create a new blank database on a MySQL or MSSQL database server. The database can be given any name you like. If you do not have authority to create a database on your database server or web host, contact your systems administrator and request that they create a database.

Create a user/password combination for the blank database with ALL privileges to the database, including, SELECT, INSERT, UPDATE, DELETE, CREATE, ALTER, and DROP. (Depending on how your database administrator defines "ALL," it may be necessary to manually

select each of these privileges.) Archon's web scripts will use this account to access the database, and Archon will not function if the user you create for Archon does not have these credentials.

Note the name of the database server, database name, user login, and user password. If a systems administrator created the database for you, ask that s/he provide you with this information using the form install.doc or install.pdf. Or ask them to run the install pack as instructed below.

Step Two: OPTION A—Use Windows install file (install.exe)

Unzip the file which you previously downloaded to a local folder. Uncompress the file.

Open the file install.exe. An installation utility will launch. The utility is used to specify connection settings for the database and to instruct the install pack as to how it should upload the files to the web server.

Complete the fields as instructed (more information is available in section 6.5 below).

[See next page for screenshot].

Select either MySQL or SQL Server, depending on the server type.

Supply the server address (either name or IP address.

Enter the database's username (login) and password that you created when the blank database was set up, as well as the name of the database.

The second part of this form specifies how the install packet will upload the archon scripts to the webserver. Check EITHER 'copy to local directory' OR "Copy to FTP Server" If you select FTP, the Server Address, Port, Login, Password, and Upload Path fields must be completed. Normally, Port should be left at the default value of "21". NOTE: This login and password are probably different than the database login and password.

The web address field MUST be completed for installations using either the local directory or FTP method. Provide the based URL where Archon will be accessible, e.g. http://www.archon.org/archon/

When you are ready, click 'Install!' The utility will upload the files to your web server.

If the utility is successful, you will see a box similar to that shown below. Go to the web-based installation utility (i.e. the web address you provided), but DO NOT CLOSE THE BOX SHOWN BELOW. After the installation is complete, you will need to enter a code into the box to activate your installation of Archon.

Step2: OPTION B—Manual Installation

Copy or FTP the Archon folder from the zip file to your webserver. Open config.inc.php and provide the connection credentials. Launch the web-based installation utility.

Step 3: Complete the Web-Based Installation Utility

The web-based installation utility includes 10 steps. The installer attempts to connect to the database, creates tables, and completes initial configuration for your installation of Archon.

Step 1: Click through the welcome screen.

Step 2: Read and accept the open-source license agreement

Step 3: Read the information and click "Next" to continue

Step 4: Test database configuration. If everything is OK, click "Next," otherwise, reconfigure database or correct information supplied in initial (non-web-based) install utility, then run the web-based installation utility again.
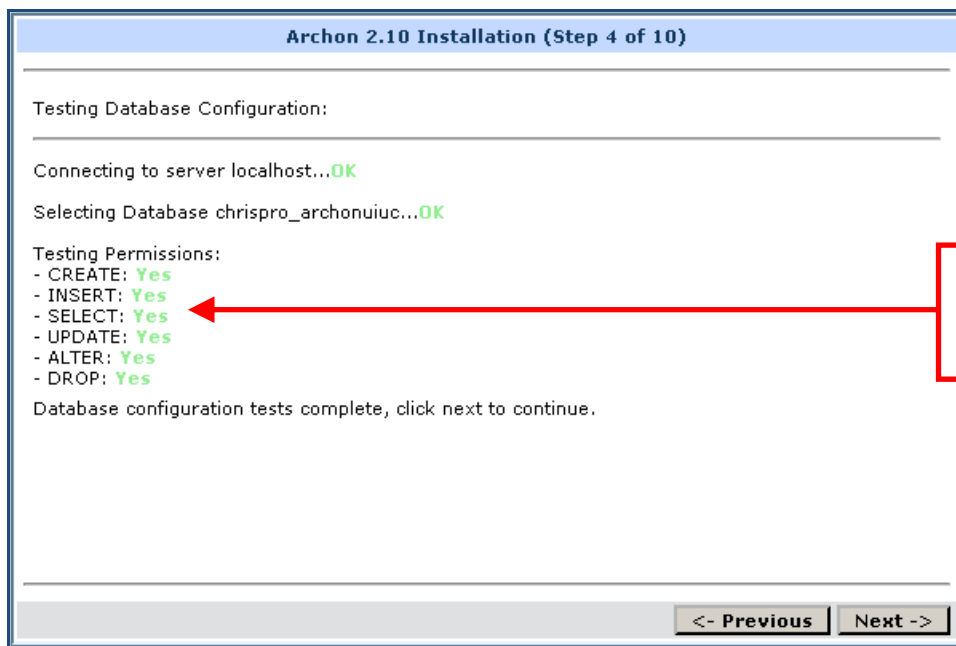
Step 4 showing successful test of database connection and user credentials in green.

Step 5: Installation utility creates database and table structure. After the structure has been created and the page loads completely into the web browser, scroll to the bottom of the screen and click "next."

Step 6: Create sa (Super Administrator) and Administrator user login credentials.

NOTE: The sa account will allow full administrative access to Archon. Unlike the other passwords, the SA password is not stored in the user table. It is a 'failsafe' password allowing access to the Archon administrative (staff) interface in case the user table is corrupted. All passwords are stored as one-way hashes and cannot be read by humans or decrypted.

Step 7: Select the packages you wish to install. **Note:** you can install missing packages or uninstall unneeded packages later if desired.

Step 8. Depending on the options you selected, one or more package installers will run. Follow instructions on each screen carefully.

Step 9: import XML language files for administrative interface. Two languages are supplied, English and Spanish. If you are interested in translating Archon to another language, please contact us.

NOTE: The language import may take a long time. Do not interrupt the process. Scroll down, and you will see a message like this when it is finished:

[see next page for screenshot]

46

```
Importing package subjects...
Import of phrases successful.


Parsing file eng-subjects.xml...
eng-subjects.xml loaded and parsed.


Importing package subjects...
Import of phrases successful.

All files imported!

                                          <- Previous | Next ->
```
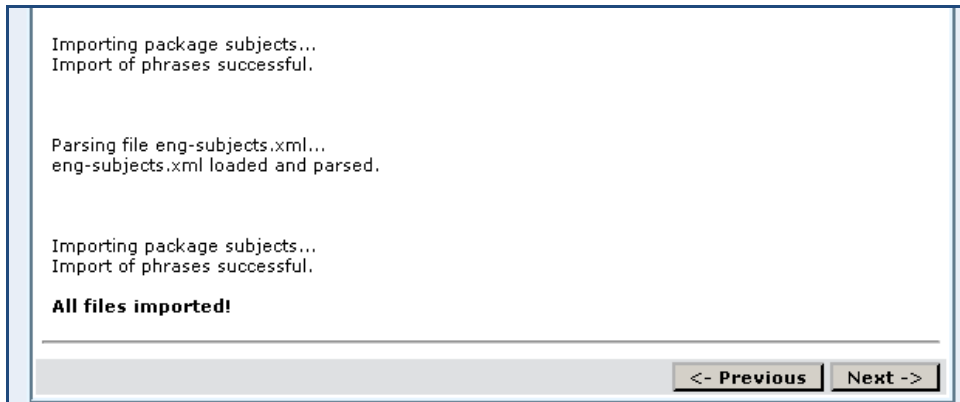
Step 10: Installation is complete. Follow the instructions on the screen carefully to finalize the installation. Archon will not run unless these instructions are completed.


```
Archon 2.10 Installation (Step 10 of 10)

Installation Complete!

Archon is now installed, and configured!

If you ARE using the Archon Installer utility:
1) Copy the following word to the clipboard (or write it down): ALLDONE
2) Return to the installer utility and enter the word above into the prompt.
3) Click Finish.

If you ARE NOT using the Archon Installer utility:
In order to begin using Archon, you MUST delete or rename the install.php file from the
/packages/core/install/ directory. Archon will NOT work until this file no longer exists.

Once you have done this, click Finish to access the Administrative Interface.

                                          <- Previous | Finish
```

 Finalize the Installation

Return to the installation completion box and enter the text ALLDONE, or rename the file packages/core/install/install.php.


```
Archon Installation Utility

Please enter the completion word given to you AFTER      OK
you have finished the web installation (It will appear on
Step 10 of 10).  (If your web browser gave you an error,  Cancel
click cancel to cancel installation.)

[                                        ]
```

47
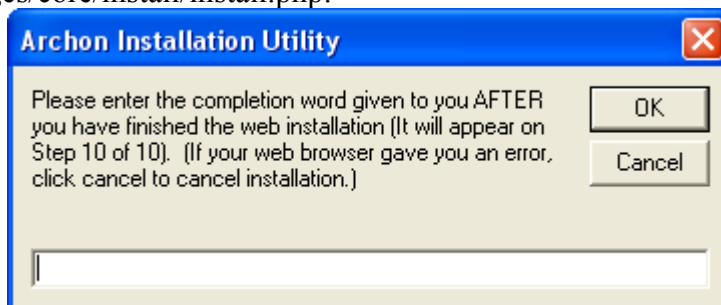
Your installation of Archon is complete. Go to the web address to start using Archon.

6.4   **UPGRADE INSTRUCTIONS**

Prepare to Upgrade Archon

IMPORTANT: Before starting, backup the archon folder on the webserver AND the source MySQL or SQL server database, so you can restore archon if the upgrade fails. We strongly recommended using the native database backup tools in phpMyAdmin, MySQL, or SQL Server. Contact your server administrator if you have any questions.

Download the install packet from the project website. Save the file on a local drive.

Note the name of the database server, name, user login/password. If you do not know any of these, they are found in the file config.inc.php in the root folder of your archon installation, on the webserver where you have archon installed, i.e. http://www.archon.org/archon/config.inc.php

Complete the Fields in Installation/Upgrade Pack, as per instructions provided above in section 6.3, "Installation Instructions."

When you are ready to upgrade to Archon 2.1, click 'Install!'

You will see a message box similar to the one below. Click Yes on this page, as well as the following confirmation page to continue and replace an existing installation of Archon.
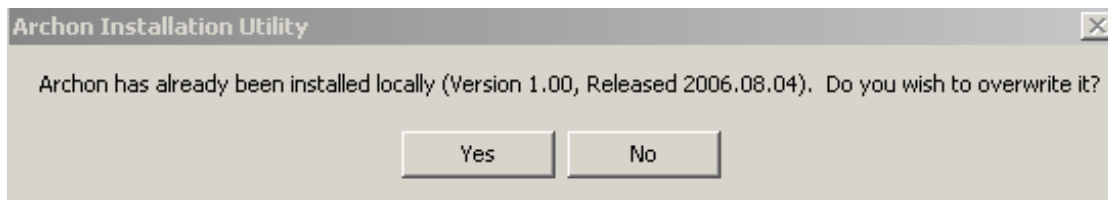
The utility will upload the files to the web server. This may take a few minutes.

You will see the following message box. Click OK to continue, and you will be taken to the web-based installation utility.
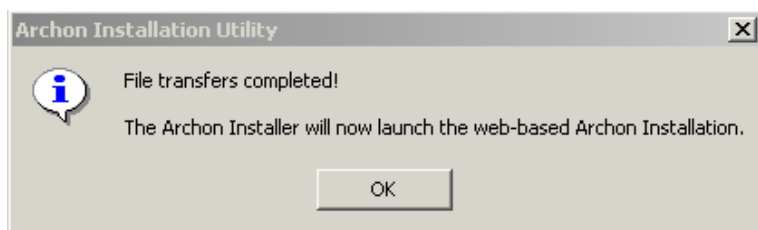
Run the Web-based upgrade utility

The web-based installation utility connects to the database, creates/updates tables, and completes configurations for your installation of Archon. No existing data is altered or changed.

Step 1: Login as an administrator and back up your data if you were did not do it earlier.

IMPORTANT: Please note that the backup generated here should only be seen as a last resort, and that it will likely fail for very large databases with many digital objects, since it is writing the entire contents of the database into one SQL script.   It is much safer to rely on a backups generated by MySQL or SQL Server. Contact your server administrator if you have any questions.

Step 2: Archon upgrades the SQL table structure and finalizes the upgrade. When you have finished reviewing the messages, click "Return to Archon", and you will be returned to the standard administrative interface. **NOTE:** Some of the upgrades can be time consuming, depending on the version you are upgrading and the amount of data in your database. Please be patient and let the installer run.

6.5   DETAILS OF INSTALL/UPGRADE DIALOG FIELDS

Database Settings

Server Type: This is the database server type. Currently the only database servers supported are MySQL and Microsoft SQL Server.

Server Address: This is the address to the database server which the Archon web application will use to connect to the database (either IP or hostname).

Login & Password: These are the credentials the Archon web application will use to connect to the database server. IMPORTANT: This user must have permissions to perform the following commands on the database: SELECT, INSERT, UPDATE, DELETE, CREATE, ALTER, and DROP. If the user account does not have all these permissions, Archon will not function.

Database name: This is the name of the database. The install pack and the Archon application itself will connect to this database, using the credentials supplied above.

Test Database Configuration: This will cause the installer to attempt to verify the existence of the database server and the validity supplied credentials. This should only be unchecked if the database server is inaccessible due to a firewall or if the database user will not have permissions to connect to the database from the machine running the installer (for example, if the database account can only connect from the web server). **NOTE:** Server addresses like localhost and 127.0.0.1 will fail if the installer is being run elsewhere than the machine the database is located on. The installer automatically unchecks the box if you detects you typing in either of those addresses.

Copy to Local Directory: This should be checked if files are transferred to the web server through a Windows file share or if the installer wants to keep a local copy of the installation on their machine as a backup.

> **Path**: This should be set to the directory where Archon will be installed (Example: \\webserver\wwwroot\Archon\ or C:\Archon\)

Copy to FTP Server: This should be checked only if files are being transferred to the web server through an FTP server.

> **Server Address & Port**: This is the address and port of the FTP server on which Archon is to be installed (either IP or hostname).

> **Login & Password**: These are the credentials the installer should use to upload Archon to the FTP server.

> **Upload Path**: This is the directory the Archon installer should create and upload Archon to on the FTP server.

Archon Web Address: This is the URL where Archon will be accessible once copied to the web server. It should be supplied whether you are transferring files to the web via a local file share or FTP server.

6.6   REGISTRATION

When you install or upgrade Archon, the information that you enter in the installation form for the Repository page will be sent to us. We will keep your registration information in a secure database that is accessible only to the project staff. We use registration information only to inform you of product upgrades or outstanding issues. We will not reuse the information for any other purpose, nor will we provide it the third parties. Therefore, we recommend you completely fill out the form, or at a minimum, include your e-mail address so we can contact you if any serious issues arise.

7.0   MODIFYING THE PUBLIC INTERFACE

7.1   OVERVIEW

Once Archon has been installed and data has been imported or entered, Archon uses the 'default' theme and templates to automatically produce a searchable, browseable website. Before customizing the interface, it is very important to understand the difference between themes and templates.

Themes control general display properties such as colors, fonts, headers, and footers. They **DO NOT** control what content is placed on a particular page, only how content is displayed. Themes

can be used to develop a local look and feel.
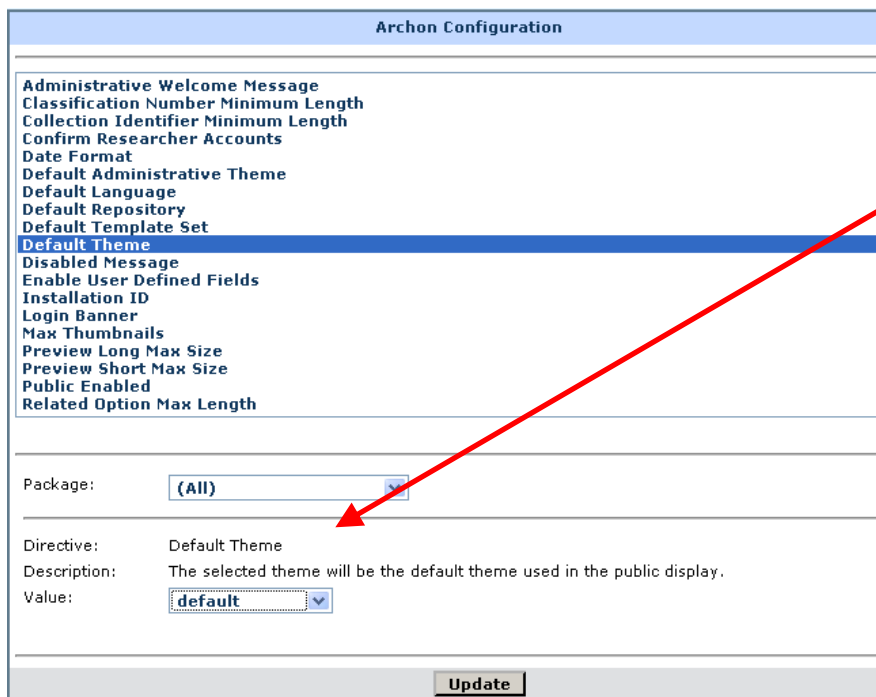
Templates control the particular data elements that appear on a particular page. They are not intended to control display properties such as layout, colors and fonts.

The public interface can be tailored to suit local needs by modifying the files in the 'themes' and 'templates' folders on the web server.

7.2   THEMES

7.2.1   Selecting a Default Theme

Use the "Default Theme" option under the "Archon Configuration" menu item.

Archon comes with a default theme which is very general in appearance, defined in the 'themes/default' folder. It makes extensive use of CSS layout properties and is compliant with web accessibility (section 508) guidelines. It is meant to function with the default template set.

7.2.2 Making your own theme

VERY, VERY IMPORTANT: If you decide to customize the look and
feel of the website, you **MUST** create a new theme by copying the existing files in the
'default' folder to a new folder in the 'themes' folder, such as 'themes/mytheme' ***If you
simply make changes in the default folder, you will run a strong risk of losing your
repository's theme during the installation of any future Archon upgrades releases.***
This is because the install scripts will update the files in the themes/default folder during
the installation procedure. The installer attempts to preserve your existing themes and
templates by copying them prior to installation, but we also recommend that you make
backup copies before running the installer

Once you have created a new theme, you can apply it to your website under the 'Archon
Configuration' menu item 'Default Theme,' as noted above.

The 'default' theme contains the following files:

style.css	controls colors, fonts, etc.
header.inc.php	the header for all pages EXCEPT full finding aids
footer.inc.php	the footer for all pages EXCEPT full finding aids
faheader.inc.php	the heard for full finding aid pages
fafooter.inc.php	the footer for full finding aid pages
index.inc.php	the 'root' page
init.inc.php	provides pointer to images

If you create a new theme, any of the above files can be modified.

You can also create new files for specialized content. For example, you might like to add
a 'contact us' page. Create a file 'contact.inc.php' in your theme folder.   Then put the
following test near the top of your theme's 'index.inc.php' file:

```
isset($_ARCHON) or die();

if($_REQUEST['f'] == 'pdfsearch')
{
    require("pdfsearch.inc.php");
    return;
}
```

You can view the page at: http://www.archon.org/archon/?p=core/index&f=contact

7.2.3 Applying themes developed under prior versions of Archon

Copy the folder themes/mytheme from your old archon installation into the new archon folder. It will appear as an option under the Archon Configuration->Default Theme Menu.

If you want to use themes from previous versions under version 2.1, you have two options:

OPTION 1: Retain the theme files, *as well as the template set that functioned with the old theme*.

OPTION 2: Copy the information from the final section of the new default theme's style.css file to your old theme's stylesheet, and make necessary adjustments to the theme. Use the default template. More complete information is provided in section 7.3.3.

IMPORTANT: You should carefully consider the advantages and disadvantages of not migrating forward to the new themes and tempaltes; in general, you will lose a great deal of functionality by not migrating forward.

7.3   TEMPLATES

Templates provide more refined control over individual pages produced by Archon.   For each output page produced, Archon's packages include a pub file and optionally a template.

 By looking at the files on the webserver, you can see how the templates are organized within the application as a whole.

The webserver's Archon folder holds the following folders: adminthemes, db (the database abstraction layer), incoming (holding place for files to import), packages, and themes.   The themes folder has been discussed above in section 7.2, and the adminthemes folder works like the themes folder, except that it applies to the staff interface.

7.3.1   *Background regarding the templates system*

When customizing the interface using the template system, all work will be done in the packages folder. Archon's packages have a modular structure. The core archon files are found in the 'core' folder. For each installed package, a subfolder will be added as a sibling to the 'core' folder. Current packages include accessions, collections, creators, digital library, research, and subjects. Each of these packages works by referencing objects, methods, and properties that are defined in the 'core' folder (specifically, in the Archon API's $_ARCHON object).
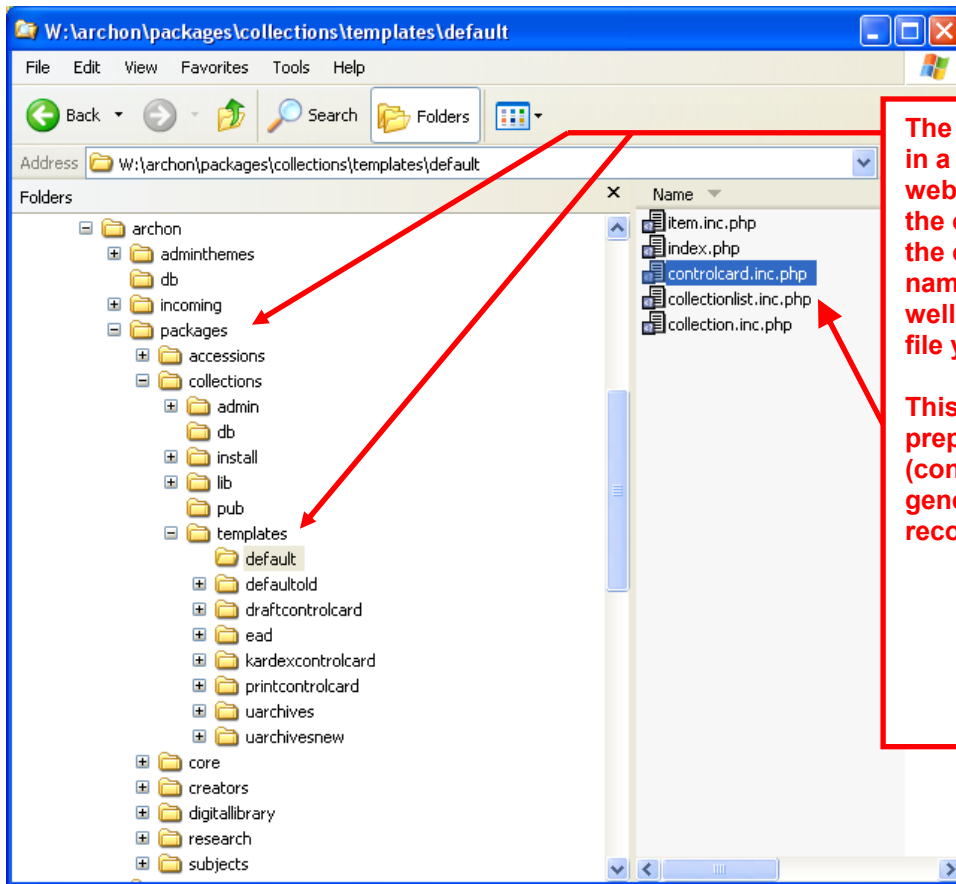
As a web application, Archon functions by evaluating parameters passed to the file index.php, found in the the root 'Archon' folder. All html output is generated by a GET or POST to index.php. index.php simply calls other files based on an evaluation of the

querystring.

When you wish to customize the output of a particular page, you need to find the 'template' which controls output for the package and specific file being called. The templates for each package are found in the templates folder for that particular package:

Package	Templates location
Accessions	packages/accessions/templates (none currently defined)
Collections	packages/collections/templates
Core	packages/core/templates
Creators	packages/creators/templates
Digital Library	packages/digitallibrary/templates
Research	packages/research/templates
Subjects	packages/subjects/templates

The following dialog shows the user preparing to edit the file controlcard.inc.php in the collections package's default template set, i.e. the file generated by urls containing the queystring '?p=collections/controlcard&id='

7.3.2   Editing Template Output

If you wish to modify the output generated by Archon (instead of just tweaking the colors, fonts, etc.), you must modify the files for the package and template set you wish to modify.   For example, if you wish to modify the 'default' output for the brief collection record to have fields show in a different order, you can make modifications to the file controlcard.inc.php in the folder packages/collections/templates/YourTemplateName

VERY, VERY IMPORTANT: If you decide to

customize the output produced via the template system, we strongly recommend that you create a new template set by copying the existing files in the 'templates/default' folder to a new folder in the 'templates' folders for **ALL** of the packages whose output you wish to modify. *If you simply make changes in the templates/default folder, you will run a strong risk of losing your repository's template set during the installation of any future Archon upgrades that may be released.* This is because the installer will update the files in the template/default folders during the installation procedure.   The installer attempts to preserve your existing themes and templates by copying them prior to installation, but we also recommend that you make backup copies before running the installer.

Once you have created a new set of templates, you can apply it to your website under the 'Archon Configuration' menu item 'Default Template Set.' See section 7.3.3. below
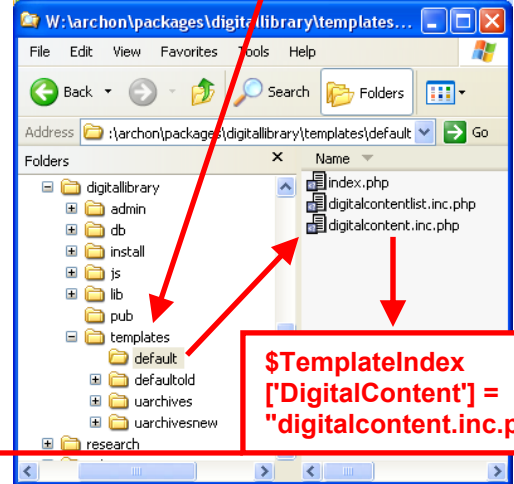
You can determine which file to edit by analyzing the querystring for a particular page. The querystring will always point to the package and to a file in the 'pub' folder of that package. In turn, the file in the 'pub' folder MAY have a template associated with it.

For example, a url containing 'index.php?p=digitallibrary/digitalcontent&id=" points to the file digitalcontent.php in the pub folder of the digitallibrary package. By examining the contents of the file 'index.php' for the template set you are using, you can tell if a template has been associated. In this case, the file contains a line:

```
$TemplateIndex['DigitalContent'] = "digitalcontent.inc.php";
```

Therefore you can control the output of any page by editing the associated file in the template set you are using. This is graphically represented in the schematic on the following page.

[see digram/screenshots on next page]

IMPORTANT: It is strongly recommended that you do not edit files in the pubs folder. Any changes to the pubs folder are in essence low-level changes to the Archon API and will not be supported in future releases or upgrades. The modular structure of Archon is such that changes can be made in the associated templates file WILL be retained if/when you upgrade to a future release of the software. Changes to text in the files generated by the Pubs folder can be made in the "Phrase Manger" under the public phrases area. Please see section 4.5 for instructions.

EXCEPTION: It may be necessary to edit the files in the pub folder if you plan to use Archon in a language other than English. In future releases of Archon, we plan to move all of the English content in the pub files to another location, for modularization.

7.3.3   Selecting and Applying Templates

Archon comes preloaded with a default output template. When you create a new folder

in the templates directory on the server for each particular package, the new template will automatically appear as a menu item under Archon Configuration->Default Template Set.

More detailed changes to specific output screens are made using the "Default Template Set" option in the "Archon Configuration" menu

Select an option from this pull down menu.

New templates can be created by adding folders to the templates folders on the webserver (it generally makes sense to copy and existing folder and edit the information.) Any folders that are added will automatically appear as an option on the pull down menu.

Please note that it is also possible to apply a different template to an individual collection, by selecting that template directly in the Collections Manager record for that collection.

A specific template can be applied to an individual collection without overriding system defaults by selecting the template from the Collections Manager Interface.

You can also refer to the templates by passing a parameter the querystring. For example, 'p=collections/controlcard&id=31&templateset=printcontrolcard&disabletheme=1' will produce the printcontrolcard view instead of the default output. "disabletheme=1" removes all of the other styling information, as well as any html and php that are typically included in the selected theme's header.inc.php and footer.inc.php files. Similarly, a templateset can be forced in the script itself, using PHP.

7.3.4 Commonly Modified Template Files

collection.inc.php	Controls display of 'collection-level' information in p=collections/findingaid
controlcard.inc.php	Controls main 'collection level' view shown in p=collections/controlcard
digitalcontent.inc.php	Controls display of digital content in digitallibrary/digitalconent
index.inc.php	This file should only be modified if you are adding a new template to the template set, it is used internally as an index to reference templates in the selected package.
item.inc.php	Determines display of all materials listed in the 'content manager' in p=collections/findingaid

You can also define new template files. For example, if you would like the finding aid to display folders differently from other content, you can define a file called folder.inc.php and include appropriate tests to customize the output for folders. See http://forums.archon.org/viewtopic.php?t=69 for more information.

7.3.5 Overview of Archon's API

Archon is built on a modular, object-oriented application programming interface. You may wish to make changes to the way materials are displayed. For example, you may wish to refer to Archon fields which are used in the administrative interface but not currently included in public output generated by any of the templates.

You should consult the list of objects, properties and methods when making the changes because many of the methods contain parameters that affect display properties.

Within the templates, you may include any PHP code you like, and you can access the classes noted in the comments at the top of the file. The Archon API is available in any script, and can be called by referencing the variable $_ARCHON and calling functions defined in the class Archon on the project website.

Full documentation of the classes, objects, methods, etc is maintained on the documentation page of the Archon project website, www.archon.org.

7.3.6 EAD and MARC Output

When a staff user is logged in, the EAD and MARC output can be viewed and saved by clicking links at the bottom of the truncated collection record available through p=collections/controlcard. For local purposes, the records can then be imported to other systems. AT UIUC, we are planning to tailor the system so that the MARC and EAD files are written to local directories and/or FTP servers, then automatically loaded into other systems, such as library catalogs. More information on this process may be available from the project staff at a later date.

EAD output can be modified by editing the files in the packages/collections/templates/ead folder. This template set is a bit more complicated and should serve as a good reference if you want to accomplish more intricate customization.

The MARC output must be edited directly in marc.php in the root folder of the archon installation. The marc output is produced using a third-party, open source library called PHP MARC. More information on PHP MARC is available through http://www.emilda.org/index.php?q=php-marc or through the package documentation on the Archon project website, at http://www.archon.org/doc/.

IMPORTANT: If you choose to edit this file, be sure to retain a copy before upgrading to a future release.

We are soliciting feedback on MARC and EAD export functions. Please contact the project staff if you have comments or notice an error in the mappings we have chosen.

8.0 ADDITIONAL DOCUMENTATION

If you cannot make the output changes you desire using the above information, refer to the developer documentation. Please see http://www.archon.org/doc/ for a full description of available classes, functions and constants.

9.0 GLOSSARY

Administrative Interface: The web forms produced by Archon which allow the Archon Administrator and anyone with a valid login and password (i.e. archival staff) to modify data stored in the Archon system.

Accessions Manager: An Archon module used by archival staff to enter basic descriptive, classification, administrative, and location information for unprocessed materials.

Classifications Manager: An Archon module typically used by an Archon Administrator or by

archival staff, to define a hierarchical system into which collections may be grouped. The Classifications Manager may be used to establish a provenance-based Record Group/SubGroup system. Use of the Classification Manager is optional.

CollectionID: The unique identifier automatically assigned to a collection record in Archon. It can be viewed on the php pages produced for any collection record. For example, 3871 is the Archon ID for the George Myers papers at the University of Illinois Archives: http://www.library.uiuc.edu/archives/archon/p=collections/controlcard&id=3871

Creator Manager: An Archon module used by archival staff to define authority files for the creators of archival material, which can then be applied to collections or digital content using the Collections Manager and Digital Library Manager.

Collections Manager: An Archon module used by archival staff to add new collection descriptions to the system or to edit existing information regarding an archival collection.

Content Manager: An Archon module used by archival staff to add detailed descriptions regarding the components of archival collections, i.e. series, boxes, folder, items, or other subunits.

Digital Library Manager: An Archon module used by archival staff to describe digital objects and to link to external digital objects and or upload objects directly into the Archon database.

File Types Manager: An Archon module used by the Archon Administrator and/or archival staff to define the types of digital objects which staff can upload into Archon and how those types will be presented in the public interface.

Level/Container Manager: An Archon module typically used by an Archon Administrator, to define the levels of description and physical container types which archival staff may select when adding information using the Content Manager.

Locations Manager: An Archon module typically used by an Archon Administrator to define the general locations (such as rooms) in which archival materials are permanently housed.

Material Types Manager: An Archon module typically used by an Archon Administrator to define the basic classes of material (such as Records or Personal Papers) that are held by your repository.

Phrase Manager: An Archon module typically used by an Archon Administrator to edit error messages and help button texts provided to users of the Administrative Interface.

Repository Manager: An Archon module typically used by an Archon Administrator to define basic information about the repository or repositories whose records are included in the installation of Archon, such as name, address, email, etc.

Sessions Manager: An Archon module typically used by an Archon Administrator to forcibly disconnect current or persistent connections to the Administrative Interface.

SA Password: The SA password is a 'super password' defined during Archon's installation routine, which will allow someone to access Archon in the unlikely event that the main user table becomes corrupted. It should not be used for routine access to the system, but should be written down in a secure location. If you need to login with the SA password, enter 'sa' for the login and used the password you set in the initial installation.

Subject Manager: An Archon module used by archival staff to define controlled subject or genre terms, which can then be applied to collections or digital content using the Collections Manager and Digital Library Manager.

Templates: Templates are files that specifically define how a single component of the public interface will be output, rendered and displayed to users.

Theme: The basic attributes and 'look and feel' of your Archon public interface. Themes are modified by changing the files in the themes folder of your archon root directory. See the Archon Administrator Manual for full instructions.