Chapter 3

Archivists' Toolkit Basics

Overview

This chapter will introduce you to the Archivists' Toolkit interface and basic features. It describes starting and logging into the application and working with the Archivists' Toolkit records.

Getting started

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Starting the Archivists' Toolkit

Launching the Archivists' Toolkit depends upon where you chose to locate Toolkit shortcuts during the installation process. The following options are possible:

1. Double click the Toolkit icon on your desktop.

2. Open the Toolkit from the folder in which you installed it.

3. In Windows:

   a. Select the Toolkit from within your Programs menu.

   b. Select the Toolkit from your Start menu.

   c. Double click the Toolkit icon in your Quick Launch bar.

Establishing the database connection

The *first* time you start the Toolkit, a window will open requesting connection information for the database, which must be completed for the application to fully load. This information should be provided to you by the person who installed the Toolkit's database.
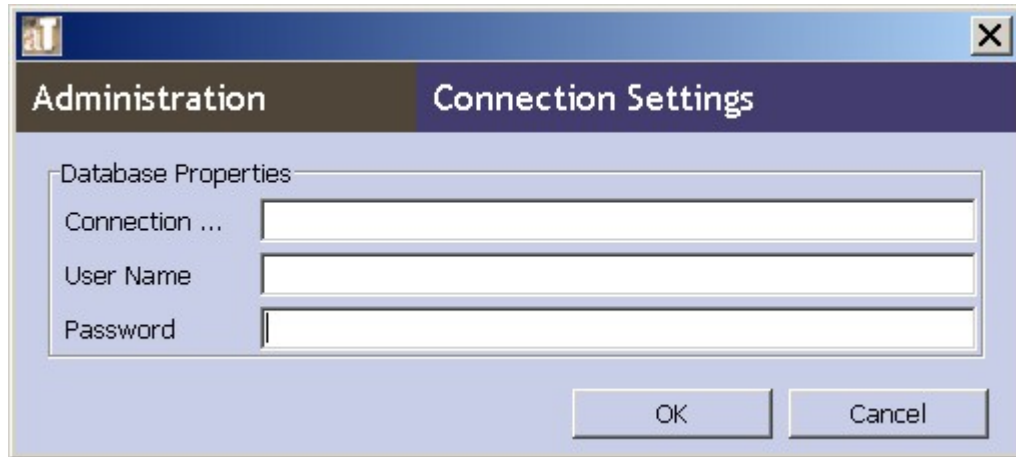
Enter the following information:

1. **Connection URL**. The network address of your database.

2. **User name**. The user name established for the database installation.

3. **Password**. The valid password for this username.

> Note: The username and password for the database is not the same as the username and password that you will use on a regular basis to log into the Toolkit's client application. For more information on logging in to the client, see the next section of this chapter.
>
> Note: The connection window should only appear for the first launching of the application. If you wish to change your connection settings after the initial launching of the application (if you are running multiple instances of the Toolkit, for example), you may do so by pressing the **Select Server** button from the login window.

Logging in

Before the application fully loads, a login screen will appear.
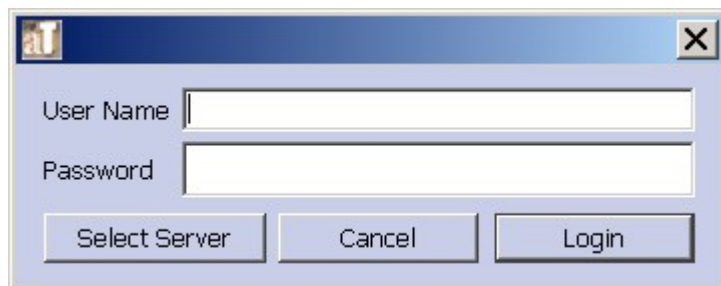
Enter your username and password and press **Login**, or press **Cancel** to stop the application from starting up.

Note: Your username and password should be provided to you by the person who installed the Toolkit's database, or by the person managing the Toolkit in your repository. For information about creating new usernames, see Chapter 4.

Becoming familiar with the Archivists' Toolkit interface

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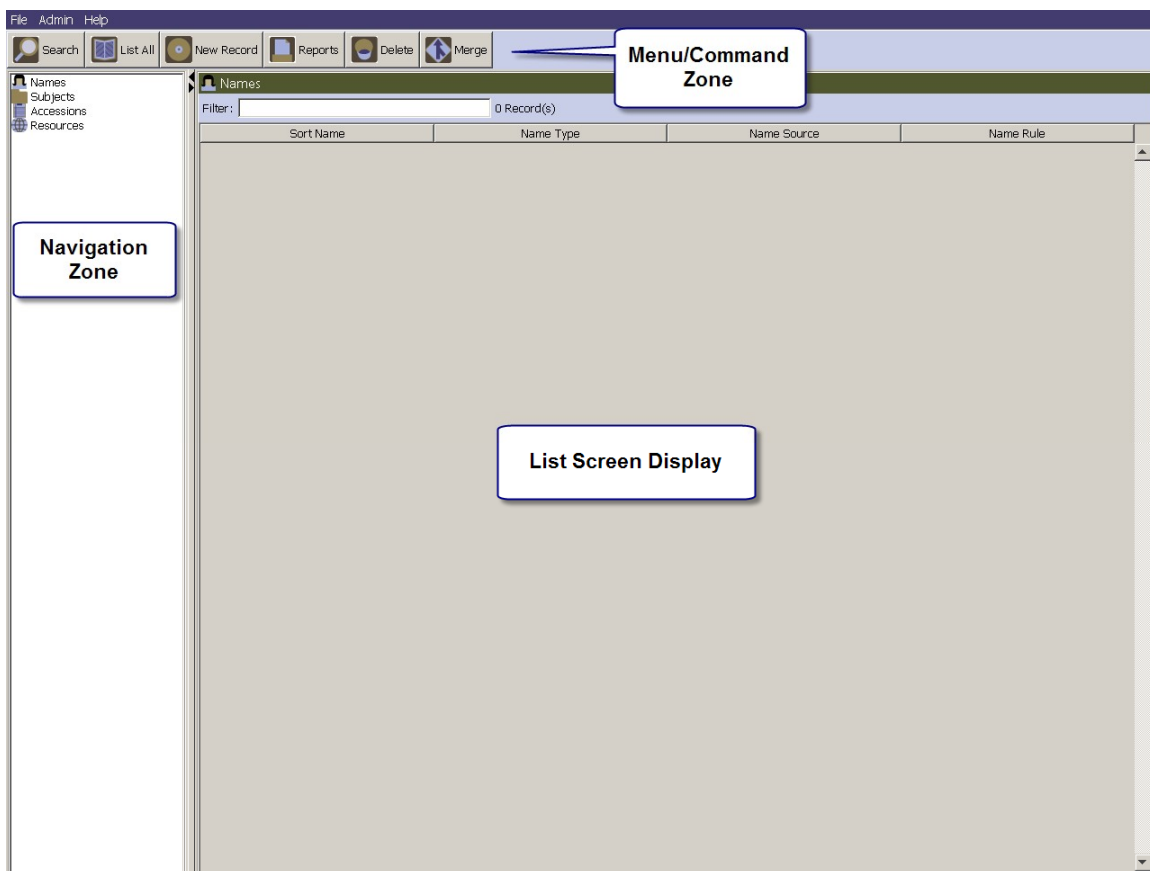
Working with records

Working with records

Overview

The AT includes several kinds of records to support description and management of archival resources. Most of these record types are accessible through the navigation pane

on the left of the main screen. Repository and location records, however, are available through the **Admin** menu.

Briefly, the records are:

Accession record

> For recording accessions and basic collection management data

Name record

> For recording the names (corporate, family, or personal) associated with an accession or a resource as either a creator, source, or subject.

Resource record

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

> The resource record contains sub-records for resource components, digital objects, and instances. A sub-record is a linked record that can only be viewed, created, and edited through the primary record.

Subject record

> For describing topical terms associated with an accession or a resource.

Repository record

> For identifying the repository have custody of the resources described.

Location records

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

Each of these records and their sub-records is described more fully in the following chapters.

Basic components of a record
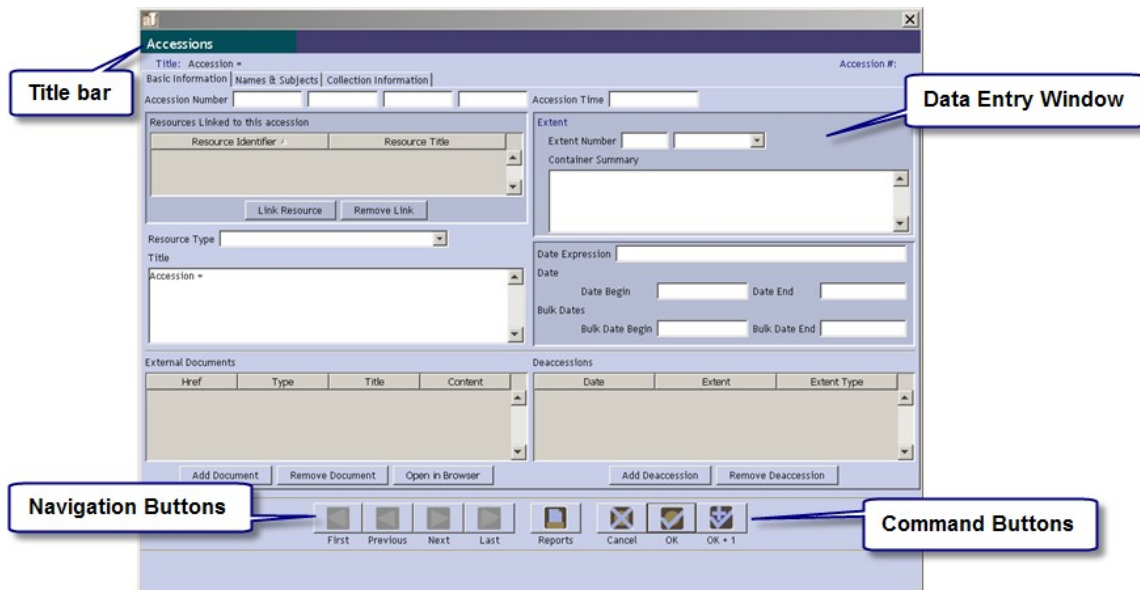
Title bar

Appears at the top of the record with the title of the record type—e.g, Resource, Accession, etc.—at the extreme left. The title bar for each record type has its own color scheme.

Component list / buttons

Appears only with resource, resource component, and digital object records. Lists hierarchically the components comprising a resource or digital object. The component buttons support adding additional components, either children or siblings or deleting components. The order of components may be modified using the drag and drop feature.

Data entry window

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

Navigation buttons

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

Command buttons

Buttons for printing a record, canceling a record, or saving a record.

Tracking bar

Located at the bottom of the record. Indicates the record id, when the record was created and by whom, and, if applicable, when the record was last modified and by whom. This information is searchable using the search tool described in Chapter 13, and will assist in tracking record creation and editing activity.

Basic characteristics of Toolkit records

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

Some alphanumeric fields have pull down lists, called lookup lists, containing predefined terms for use in the field. Most of these lists can be modified by the repository by redefining the lookup list (see Chapter 16) the application configuration module; however, some of the lists may not be modified as correct operation of the application depends on the values in the lists. The list of note types in the resource and resource component records is an example of such a list. A table with a complete list of lookup lists, the field to which they are associated, and whether or not the values in the list can be modified, is available in the appendices.

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

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

Finally, some of the records may be linked or assigned to other records as described more completely in the Linking Records section of this chapter, and in chapters 10 and 11.

Listing records

Records from any of the four key functional areas in the AT may be listed from the initial browse screen. (Names, Subjects, Accessions, Resources)

To list resource records, for example, either double click on **Resources** in the left column, or click once on **Resources** and then click the **List All** button at the top of the window. The bar across the top of the right hand display zone will then change to **Resources**.

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

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

Sorting record lists

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

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

To clear the existing sort settings, simply double click on the column that is to be the basis of the new sort. For instance, to sort resources by resource identifier, double click

on the **Resource Identifier** heading at the top of corresponding column and then indicate if the sort should be in ascending or descending order.

Other columns may be added to the list screen using the **Application Configuration** commands.

Filtering record lists

Every list may be filtered by typing text into the filter frame placed above the sort columns. The filter process takes into account the values in all the columns that are present in the list screen display.

For example, filtering on the number 9 on the list of resources pictured above will reduce the list to those resources in which "9" appears in the title, repository, container summary, resource id, or resource identifier. Filtering on the number 94 will limit the list to only those resources in which that numeric expression is contained in the data of the list screen fields.

This example indicates another characteristic of the filter feature: the filter is applied anew as each character is added or removed. Thus, adding or deleting a character from the filter expression will likely change the contents of the list.

To remove a filter, simply delete the text from the filter frame. The list screen will revert to its state it had before the filter text was entered.

> Note: You can also use the search tool to narrow down the list of records displayed in the list screen. Unlike the filter feature, the search tool allows you to limit your search to a specific field. See Chapter 15.

Printing record lists

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

Creating a new record

To create a new record:

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

2. Click on the **New Record** button on the top of the window.

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

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

Note: See Chapters 4-13 for specific instructions on creating various records in the Toolkit.

Saving a record

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

If you are entering multiple records, the [image] **OK+1** button will save the record you are working in and open a new record of the same type.

Clicking the **Cancel** button or closing the record using the window close button at the top right corner of the window will cause additions to the record to be discarded.

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

Trying to save an invalid record produces a validation error message to appear. This message will indicate what fields need to be completed for the record to be saved.

Editing a record

To edit a record:

1. Locate the record to be edited by using the filter box in the main screen, or the search tool described in Chapter 15. Once you see the record you are interested in editing, double click on the record entry in the list screen.

2. Make the desired changes in the record.

3. Press **OK** to save the changes, or **Cancel** to discard the changes.

Note: Editing a record may affect outputs from linked records. For example, changing a subject term will change that term in all of the descriptive outputs (for example, EAD and printed finding aids) for resources linked to the subject. The Toolkit will not indicate to you which linked records are affected by the modifications, or prompt you to update any descriptive outputs affected by the change in subject. It is possible, however, to search for the term to find the records linked to it. Repositories implementing the Toolkit should establish procedures and

workflows for updating information in one record that may affect linked records.

Deleting a record

To delete a record:

1. Locate the record(s) to be deleted by using the filter box in the main screen, or the search tool described in Chapter 15. Once you see the record(s) you are interested in editing, click on the record entry in the list screen.

2. Press the **Delete** button.

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

3. Press Yes to delete the record(s).

4. The record will be deleted.

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

Linking records

The Toolkit allows you to link information found in different types of records. This provides consistency of repeated data (such as names linked to multiple description records), and allows you to establish relationships between records such as accessions and resources that they are part of.

The following linkages are possible in the Toolkit:

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

Navigating records

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

To navigate records using the list screen:

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

2. Select the functional area containing the records to browse and the click the **List All** button.

3. Sort the list as desired.

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

4. Double click on any record to open it.

5. Navigate through the sorted list of records using the set of four navigation buttons located at the bottom of the record: **First**, **Previous**, **Next**, and **Last**.

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

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

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

To reiterate, what records will be opened by the navigation button depends on how the list of records is sorted. If the primary sort of resource records is on repository id, then the navigation buttons will behave quite differently that how they are described behaving for resources sorted by title in descending order.