



USER MANUAL

v. 2.1

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 a digital library.

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, 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, collections¹ 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 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

¹ Given the difficulty 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.

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.

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

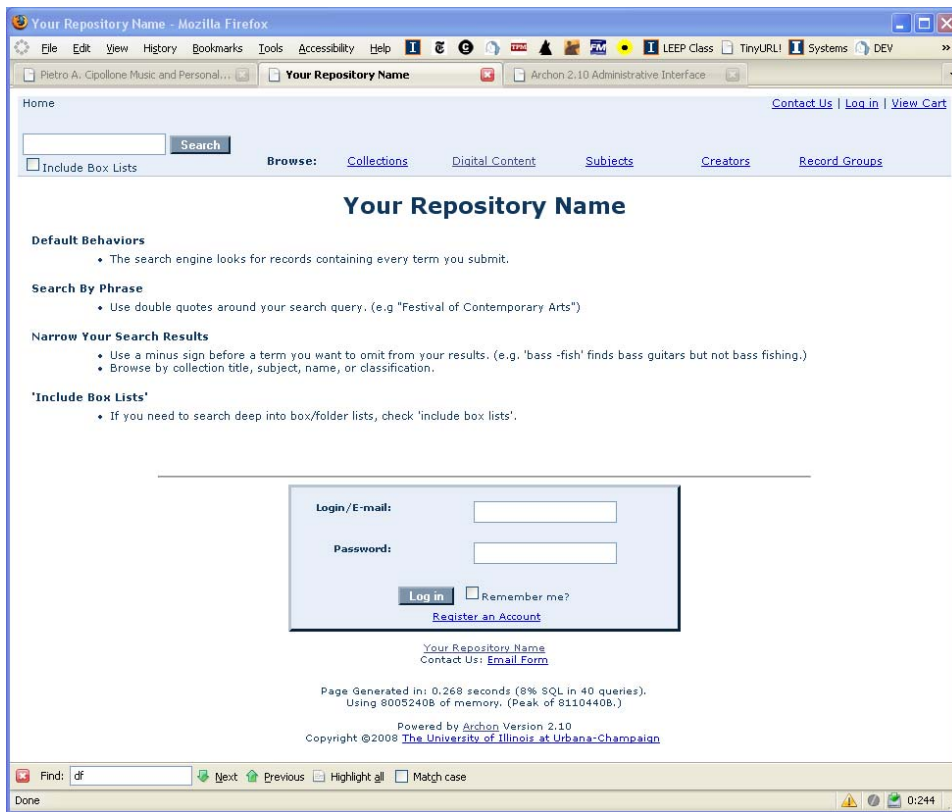
Archon automatically publishes a website containing collection-level descriptions, full finding aids, and linked digital objects. Regardless of which browser you use to create and edit records, Archon's end-user output can be viewed with any web browser. It will be available in the root folder of your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

Search Results for "papers" | Your Repository Name

You searched for "papers".

- [Records and Manuscripts](#) (93 Matches)
- [Digital Images and Records](#) (5 Matches)
- [Unprocessed Materials](#) (2 Matches)
- [Creator Descriptions](#) (14 Matches)
- [Subject Headings](#) (4 Matches)

118 Hits! Click the links to show each category's results.

Your search yielded too many results and we limited the number shown. Try adding more search terms!

- Phrase Search: Use double quotes, e.g. "Festival of Contemporary Arts"
- Limiting 'Hits':
 - Use a minus sign. E.g. 'bass -fish' finds bass guitars but not bass fishing.
 - Browse by subject, creator, or classification.

- 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).

Alumni and Faculty Biographical File (Morgue), 1882-1995 | Your Repository Name

Home → Alumni Association → Records → Alumni and Faculty Biograph...

26/4/1 Search

Include Box Lists Browse: Collections Digital Content Subjects Creators Record Groups

Alumni and Faculty Biographical File (Morgue), 1882-1995 | Your Repository Name

Title: Alumni and Faculty Biographical File (Morgue), 1882-1995

ID: 26/4/1 **Collection ID**

Created by: University of Illinois at Urbana-Champaign, Alumni Association

Arrangement: Alphabetical then chronological

Extent: 311.0 Cubic Feet

Other Information:
<http://web.library.uiuc.edu/ahx/uasfa/2604001.pdf>

Show Subjects (links to similar collections)

Show Forms of Material (links to similar genres)

Show Administrative Information

Staff Information:

Content	Location	Range	Section	Shelf	Extent
All Boxes	UAS: UA Stacks	1			311.00 Cubic Feet

Find: df Next Previous Highlight all Match case

Chris Proms Test Image | Your Repository Name

Home → Digital Archives → Chris Proms Test Image

0000002.photo Search

Include Box Lists Browse: Collections Digital Content Subjects Creators Record Groups

Chris Proms Test Image | Your Repository Name



Preview: File title field
[Download full size image](#) (GIF Image, 564 KB)

Title: Chris Proms Test Image

Date: 1960

Description: Portrait of Claude Gordon as an advertisement for his performance on the Johnny Mathis Show. Portrait of Claude Gordon as an advertisement for his performance on the Johnny Mathis Show. Portrait of Claude Gordon as an advertisement for his performance on the Johnny Mathis Show. Portrait of Claude Gordon as an advertisement for his performance on the Johnny Mathis Show.

Phys. Desc: 1 item

ID: 0000002.photo **Digital Object ID**

Found in: Claude Gordon Personal Papers and Manuscripts, 1888-1992 → Series 2: Correspondence

Creators: Administrative Services, Administrative Services Office, Administrative Studies Office, Admissions, Admissions & Records, Admissions and Records

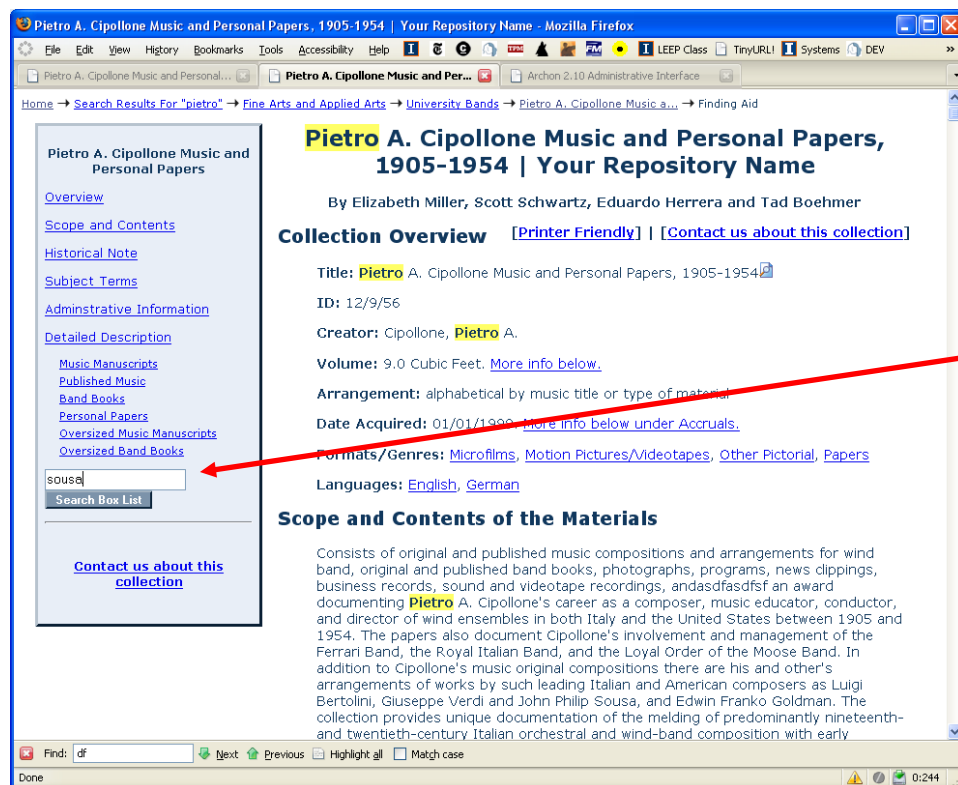
Subjects: Academic Calendar, Academic Credentials, Academic Credit, Academic Freedom

Publisher: pub

Contributor: contrib

Find: df Next Previous Highlight all Match case

2.3 FINDING AIDS



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.

A screenshot of a login form. It has a light blue background. The first section is labeled 'Login/E-mail:' and has a text input field containing the text 'prom'. The second section is labeled 'Password:' and has a text input field containing a series of asterisks. Below these fields is a 'Log in' button and a checkbox labeled 'Remember me?'. At the bottom, there is a link that says 'Register an Account'.

- 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

Title: James B. Reston Papers, 1935-1995 ✎

ID: 26/20/120

Created by: Reston, James (1909-1995) ✎

Arrangement: By functional group and sub-group

Extent: 48.6 Cubic Feet

Score

James B. Reston's papers include reports, speeches, interview transcripts, and photographs relating to Reston's career with the Associated Press (1934-39) and with The New York Times (1939-89) as a reporter (1939-89), chief

Public view]

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.

- 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

Staff Information:

Content	Location	Range	Section	Shelf	Extent
Boxes 1-142	UAR: UA Ref. Room	52			48.60 Cubic Feet

[EAD](#)
[MARC](#)
[5 by 8 Kardex](#)
[Review copy/draft](#)

- 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!

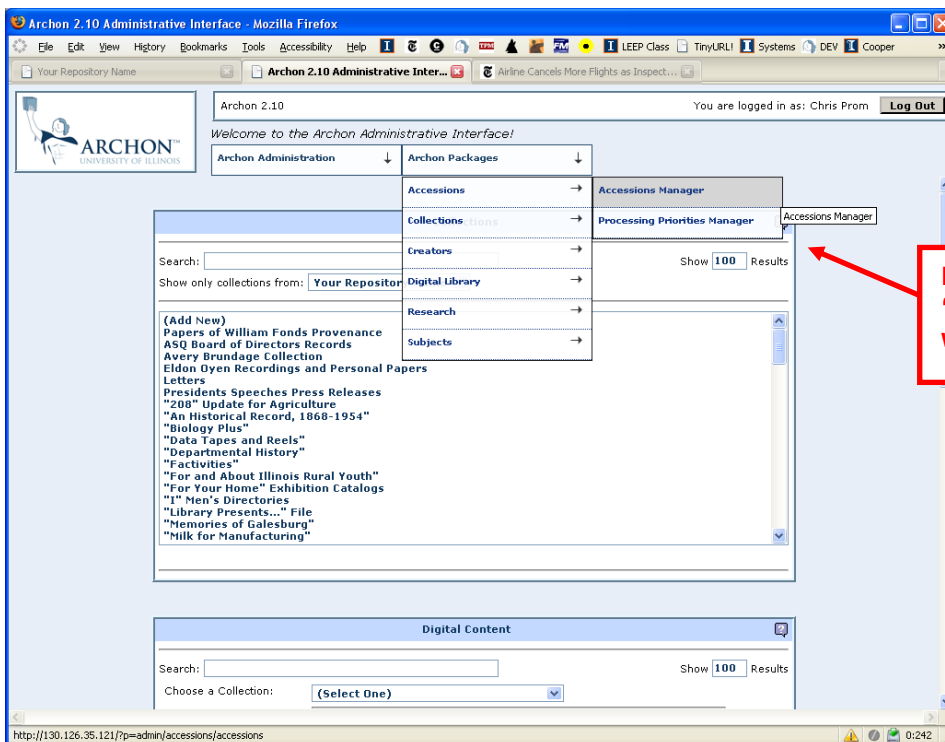
[see next page for screenshot]



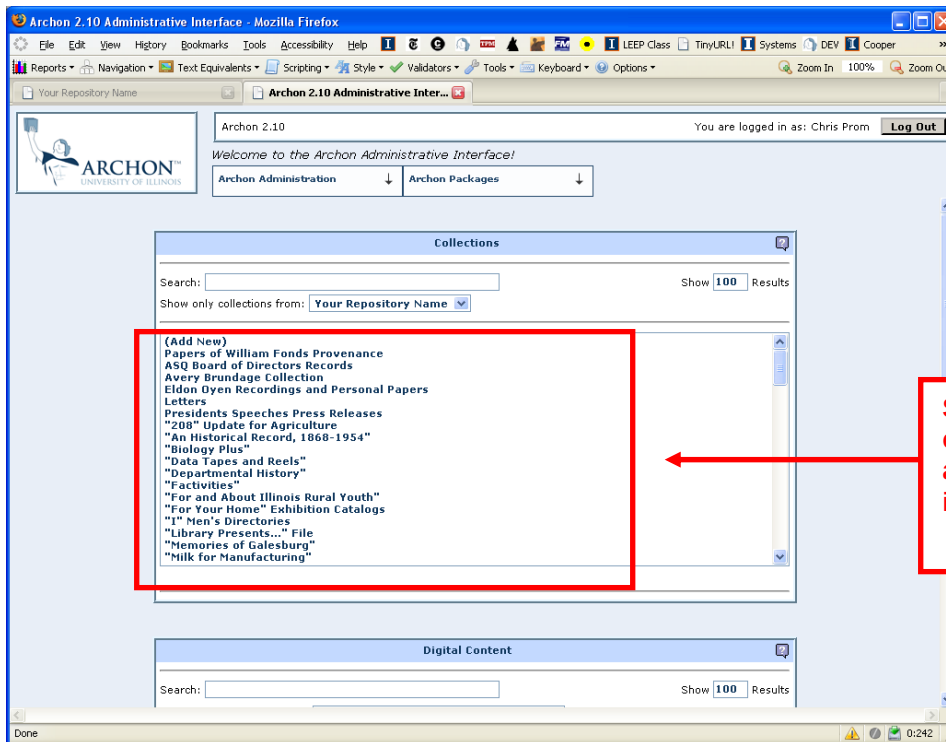
3.3 OVERVIEW OF STAFF (ADMINISTRATIVE) INTERFACE

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.



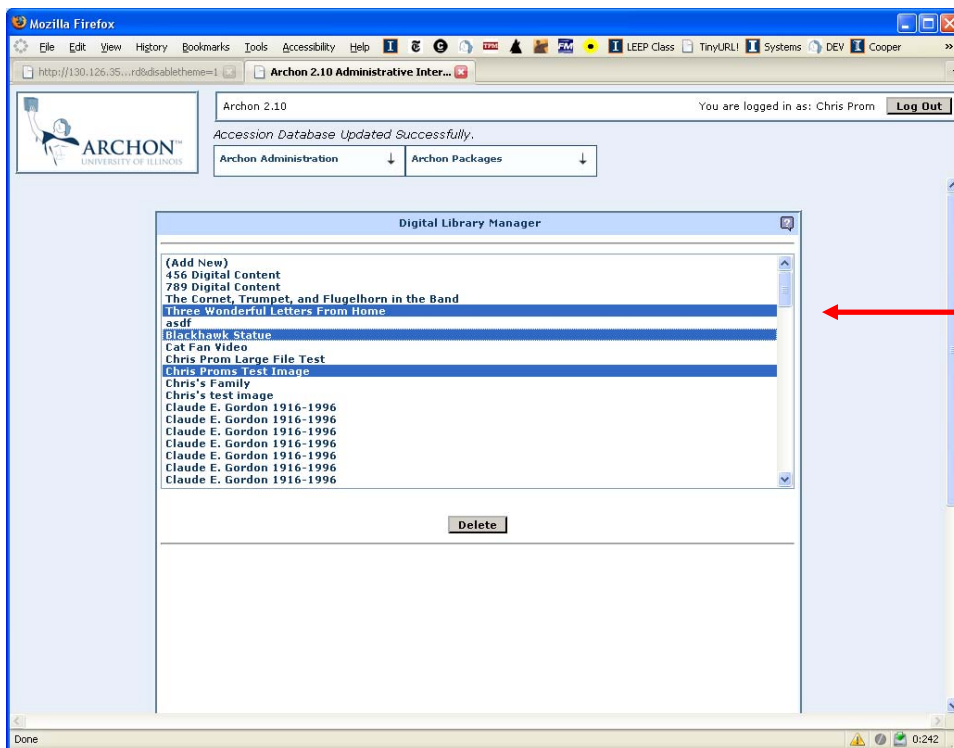
Hover over the menus and click a "manager" to load the module you wish to use.



- 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 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.



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



- 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.

4.2 MENU ITEMS AND FUNCTIONS

- **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.)

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”

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

The screenshot shows the Archon 2.10 Administrative Interface in a Mozilla Firefox browser. The user is logged in as Chris Prom. The main content area is titled 'Accessions Manager'. On the left, there is a list of accessions: 'New Accession', 'Test Accession', 'Chris Prom Papers', and 'Sara Schepis Papers'. A red arrow points from the 'Add New' link to the 'New Accession' item. Below the list, there are buttons for 'Create Collection Record' and 'Delete'. A form for creating a new accession is visible, with fields for 'Enable Web Output' (Yes/No), 'Accession Date' (MM/DD/YYYY), 'Title', 'Identifier', 'Inclusive Dates', 'Received Extent' (with a dropdown menu), and 'Unprocessed Extent' (with a dropdown menu). A red arrow points from the 'Create Collection Record' button to the 'Received Extent' dropdown menu.

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

Archon 2.10 Administrative Interface - Mozilla Firefox

Archon 2.10 You are logged in as: Chris Prom [Log Out](#)

Accession Database Updated Successfully.

Archon Administration Archon Packages

[Create Collection Record](#) [Delete](#)

Enable Web Output: ☒ Yes ☐ No

Accession Date: 12 / 23 / 1986

Title: Chris Prom Papers

Identifier: 1234

Inclusive Dates: all of them

Received Extent: 3 Cubic Feet

Unprocessed Extent: 3 Cubic Feet

Material Type: Personal Papers

Processing Priority: Low Priority

[Collections/Classifications Information](#)

[Location Information](#)

[Creator Information](#)

[Donor Information](#)

[Accession Description](#)

[Update](#)

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.

[Collections/Classifications Information](#)

University Library → Departmental Library Services (Primary Collection/Classification) [Delete](#)

(Select One)

(Select One)

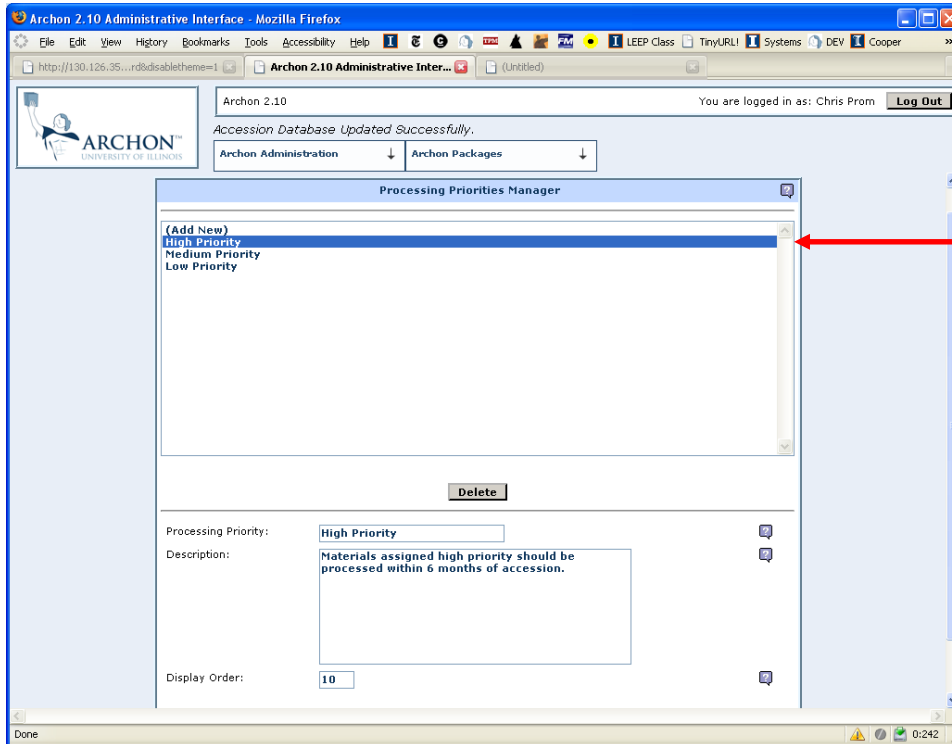
[Associate a Collection](#)

[Update](#)

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”

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.

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.

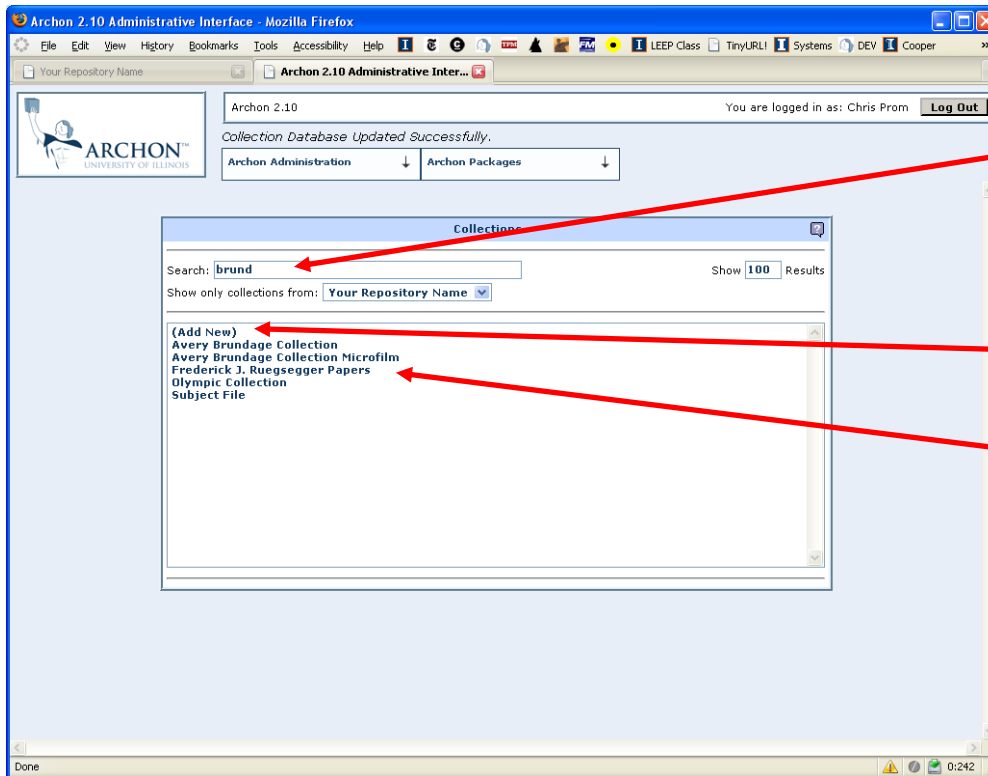
Use this section to 'link' the classification to an associated creator authority file. A historical note regarding the unit can be provided in the linked creator authority, which is edited via the 'Creator Manager'.

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.



The value typed here will filter the master list of collections by searching against the title and description fields.

Click (Add New) to create a new collection record.

Click one of the filtered terms to edit the associated collection record.

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]

Collection Manager:
Avery Brundage Collection (ID: 15920)

[Content Manager](#)

Collection Information

Title: Avery Brundage Collection

Enable Web Output: ☒ Yes ☐ No

Main Repository: The University Archives

Collection Classification: 26 Alumni Association
20 Alumni

Collection Identifier: 037

Sort Title: Avery Brundage Collectio

First/Last Year: 1908 - 1982

Inclusive Dates: 1908-82

Predominant Dates:

Type of Materials: Personal Papers

Extent: 143.0 Cubic Feet

Finding Aid Author:

Template: System Default (default)

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:

Collection Information

Title:

Enable Web Output: ☒ Yes ☐ No

Main Repository:

Collection Classification:

Collection Identifier:

Sort Title:

First/Last Year: -

Inclusive Dates:

Predominant Dates:

Type of Materials:

Extent:

Finding Aid Author:

Template:

[Location Information](#)

[Creator Information](#)

[Collection Description](#)

[Subjects](#)

[Genres](#)

[Languages](#)

[Access Restrictions](#)

[Acquisition Information](#)

[Related Materials Information](#)

[Other Information](#)

[Finding Aid Information](#)

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.

Location Information

Content	Location	Range	Section	Shelf	Extent	
	(Select One)				0	(Select One)
All Boxes	UAS: UA Stacks	21	3		10.0	Cubic Feet
Boxes 327-	UAS: UA Stacks	18	1		4.4	Cubic Feet
Boxes 341-	UAS: UA Stacks	28	10		2.6	Cubic Feet
Boxes 342-	UAS: UA Stacks	21	3		1.6	Cubic Feet
Boxes 348-	UAS: UA Stacks	17	2		0.6	Cubic Feet

[Launch Location Manager](#)

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.



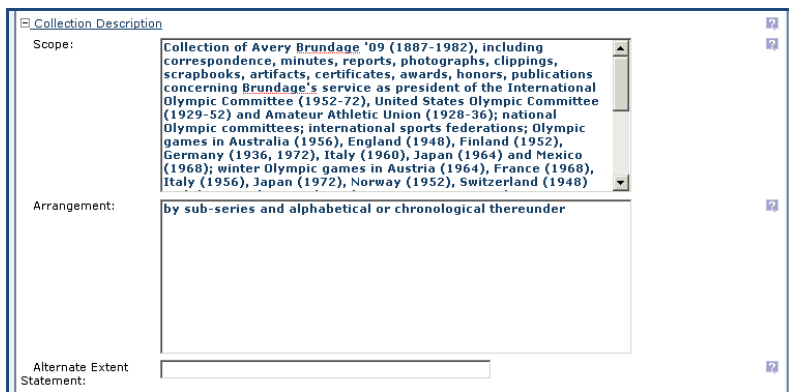
Type a value here to filter the authority list and locate the creator you wish to apply.

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

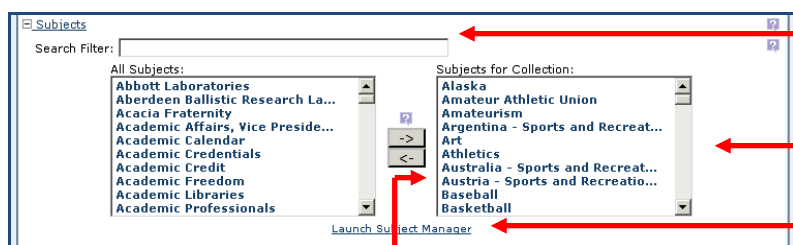
Click ‘Launch Creator Manager’ to create new creator authority records.

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.



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

Apply a subject with the arrows or by double clicking.

Click this link to create new subject authority records.

(Sample multi-part term)

Multipart terms (such as Afghanistan – History and Geography – 19th 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.

The screenshot shows the Archon 2.10 Administrative Interface in a Mozilla Firefox browser. The page title is 'Archon 2.10 Administrative Interface - Mozilla Firefox'. The user is logged in as 'Chris Prom'. The main content area is titled 'Collection Manager: Presidents Speeches Press Releases (ID: 15192)'. A red arrow points to the 'Content Manager' button at the top of the collection record. Below this, the 'Collection Information' section is visible, containing fields for Title, Enable Web Output, Main Repository, Collection Classification, Collection Identifier, Sort Title, First/Last Year, Inclusive Dates, Predominant Dates, Type of Materials, Extent, Finding Aid Author, and Template. The 'Content Manager' button is located at the top of the collection record, below the title bar.

Launch the collection manager by clicking the button at the top of a collection record.

[continue to next page]

5.2.4.1 Basic Interface

Content Manager:
Pietro A. Cipollone Music and Personal Papers (ID: 14326)

Current Level/Container:
» [Pietro A. Cipollone Music and Personal Papers]

Content contained by [Pietro A. Cipollone Music and Personal Papers]:

Level/Container	Container Number	Title/Content	ID
Series	7	(Add New)	
Series	1	Music Manuscripts, dates	46366
Series	2	Published Music	46378
Series	3	Band Books	46367
Series	4	Personal Papers	46379
Series	5	Oversized Music Manuscripts	46368
Series	6	Oversized Band Books	46380

Transfer Delete

Level/Container: Series
Level/Container Number(s): 7
Title:
Date(s):
Description:

User Defined Fields:

Label/Head: Content: EAD Field Type: (Select One)

Add

Return to Collection Manager

Content hierarchy/tree
Current content available for editing. Single-click to edit; double-click to nest content underneath the selected level.

Transfer highlighted levels to another point in hierarchy or even another collection.

Delete selected levels/containers and all content records contained by them.

Fields other than number and title are available ONLY if a level/container with a type of 'intellectual level' (e.g. series, file or item) is being added.

User-defined fields. Content becomes the value of the element's text, with the head/label provided.

Return to collection-level description.

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

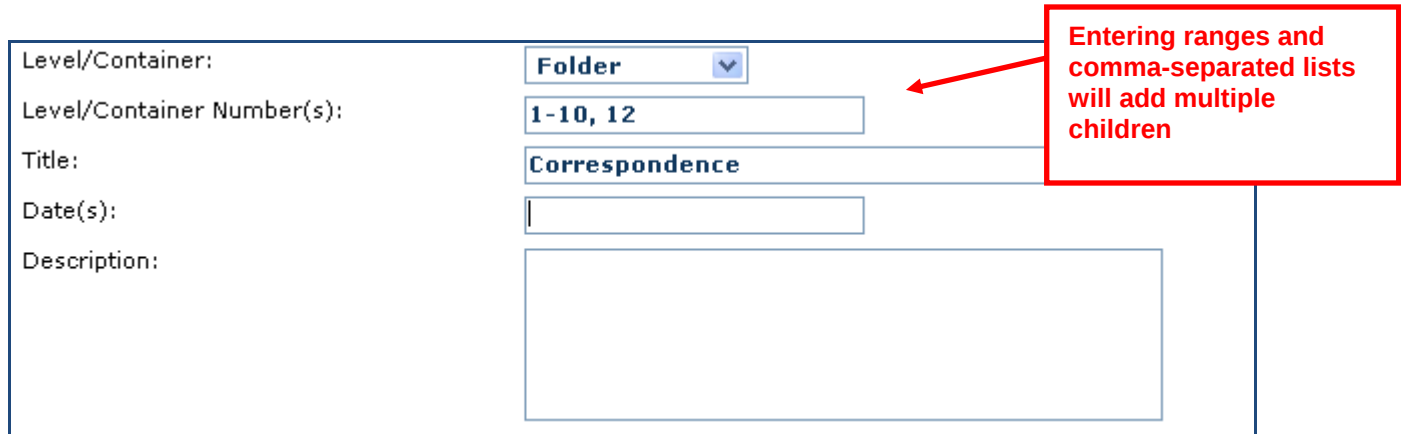
5.2.4.2 Content hierarchy/tree: The indented levels at the top of the content manager provide a visual clue as to your current 'location' in the descriptive tree. This sample shows a user at the top level of the Cipollone Music and Personal Papers, ready to add a series or edit an existing series.

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:



The screenshot shows a form with the following fields:

- Level/Container:** A pull-down menu currently showing 'Folder'.
- Level/Container Number(s):** A text input field containing '1-10, 12'. A red box highlights this field with the text 'Entering ranges and comma-separated lists will add multiple children' and an arrow pointing to it.
- Title:** A text input field containing 'Correspondence'.
- Date(s):** An empty text input field.
- Description:** A large empty text area.

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

User defined fields:

Label/Head ?	Content ?	EAD Field Type ?
(Add New)		(Select One)

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

Archon 2.10 Administrative Interface - Mozilla Firefox

Archon 2.10 You are logged in as: Chris Prem Log Out

Welcome to the Archon Administrative Interface!

Archon Administration Archon Packages

Content Manager: Pietro A. Cipollone Music and Personal Papers (ID: 14326)

Current Level/Container: [Pietro A. Cipollone Music and Personal Papers]

Content contained by [Pietro A. Cipollone Music and Personal Papers]:

Level/Container	Container number	Title/Content	ID
Series 7	(Add New)		
Series 1	Music Manuscripts, dates	46366	
Series 2	Published Music	46378	
Series 3	Band Books	46367	
Series 4	Personal Papers	46379	
Series 5	Overlaid Music Manuscripts	46368	
Series 6	Overlaid Band Books	46380	

Transfer Delete

Batch Renumber Collection Content

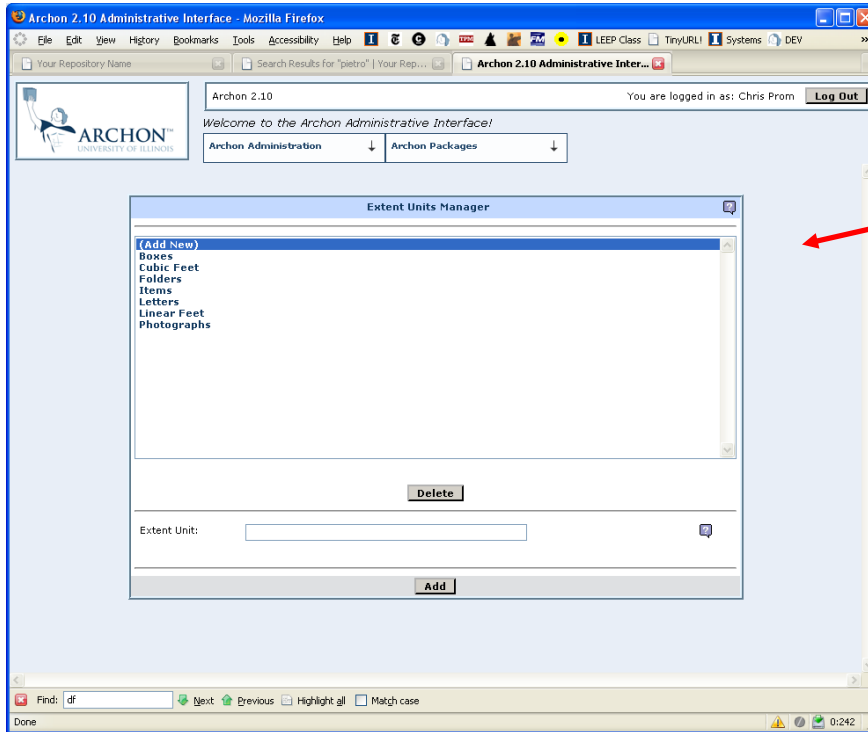
Amount: Up Down

Update

Return to Collection Manager

If you select multiple items using CTRL-click or SHIFT-Click (see section 3.3 "overview of staff interface") the content area will provide you the option to batch renumber content. This can be useful when you have misnumbered folders or when you need to insert an folder, series or box.

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 Manager 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 be 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]

Level/Container Manager

(Add New)
 Box
Folder
 Item
 Series
 Sub-Series

Delete

Level/Container: **Folder**

Level/Container Type: ☒ Intellectual ☒ Physical

EAD Level: **file**

Primary EAD Level: ☒ Yes ☐ No

Global Numbering: ☐ Yes ☒ No

Update

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

Archon 2.10 Administrative Interface - Mozilla Firefox

File Edit View History Bookmarks Tools Accessibility Help

Your Repository Name Search Results for "pietro" | Your Rep... Archon 2.10 Administrative Inter...

Archon 2.10 You are logged in as: Chris Prom Log Out

Welcome to the Archon Administrative Interface!

Archon Administration Archon Packages

Location Manager

(Add New)
 AD1: Rm 106F, ARC
 AP1: Rm 1/1A/2, ARC
 AP2: Rm 10A, ARC
 AP3: Rm 106A, ARC
 AP4: Rm 106B, ARC
 AP5: Rm 106D, ARC
 AP6: Rm 107A, ARC
 AP7: Rm 107B, ARC
 AP8: Rm 107C, ARC
 AP9: Rm 107F, ARC
 AR4: Rm 104, ARC
 AR5: Rm 105, ARC
 AS0: Rm 10, ARC
 AS1: Rm 107 ARC
 AS2: Rm 201 ARC
 AS3: Rm 102/103, ARC
 AS4: Rm 4, ARC
 AS8: Rm 8, ARC

Delete

Location:

description:

Add

Find: df Next Previous Highlight all Match case

Done 0:242

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” MODULE

The screenshot shows the 'Creator Manager' window. At the top is a list of creators, including 'University of Illinois at Urbana-Champaign', 'Small Homes Council-Building Research Council', 'Fuermann, George, 1918-', 'I" Men's Association', '123 Creator', '12345 Creator', 'Abbott, W.', 'Abbott, William Lamont (1861-1951)', 'Abraham Lincoln School of Medicine', 'Abramovitz, Max (1908-)', 'Abrams, Samuel', 'Academic Development', 'aCarnegie, David W (1871-1900)', 'Accountancy Department', 'Accounting Division', 'Ackerman, Joseph (1904-1976)', 'Adams, Leverett A. (1877-1976)', 'Adams, Roger (1889-1971)', and 'Adler, Felix T. (1911-1979)'. Below the list is a 'Delete' button. The main form contains fields for 'Name:', 'Dates:', 'LCNAF Compliant:' (with 'Yes' and 'No' radio buttons), 'Creator Type:' (a dropdown menu), 'Fuller Form of Name:', 'Name Variants:', 'Biographical/Historical Note:', 'Sources for Biography or History:', and 'Biographical/Historical Note Author:'. There is an 'Add' button at the bottom right of the form.

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.

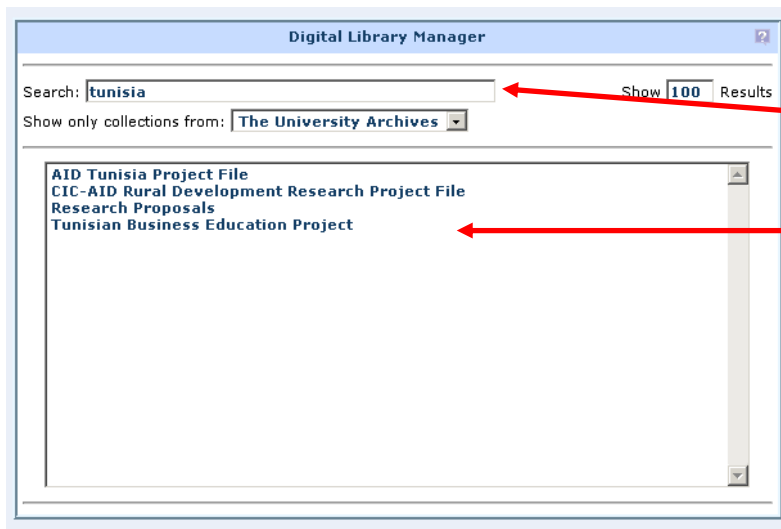
5.4 “DIGITAL LIBRARY” MODULE

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.

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

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 MODULE

The research module 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’ MODULE

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]

Subjects under [root]:

(Add New)
Agricultural Marketing
American Marketing Association
Book Marketing
Common Market European
Dairy Marketing
Journal of Marketing Research
Livestock Marketing
Market Planning
Market Research
Marketing
Milk Marketing

Transfer Delete

Subject: market

Subject Type: (Select One)

Subject Source: (Select One)

Add

Single-click 'add new' to define a new term.

To edit an existing term, type in the 'search' box to filter the list, then select the record you wish to edit. Information can be added or edited in the area below the filtering box

Select type from pull down list (default installation lists LCSH types)

Select source vocabulary from drop down list.

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 most 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: lcsb

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

Subject Types Manager

(Add New)
Corporate Name
Date
Family Name
Function
Genre/Form of Material
Geographic Name
Occupation
Personal Name
Title
Topical Term

Delete

Subject Type: Genre/Form of Material

EAD Type: genreform

Encoding Analog: 655

Update

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 2: 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

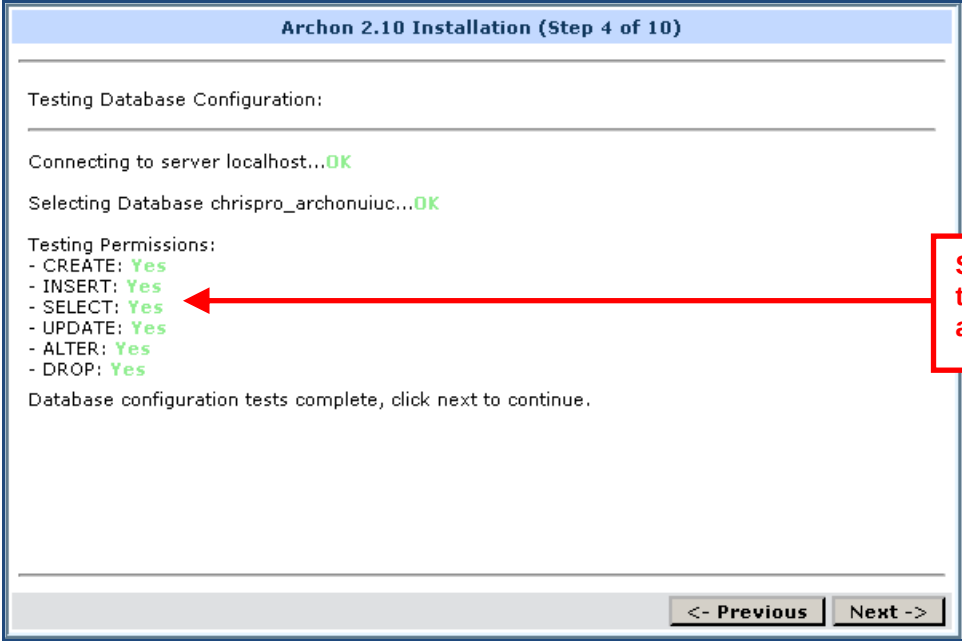
The web-based installation utility includes 10 steps. The installer attempts to connect to the database, creates tables, and completes initial configuration for your installation of Archon.

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.



The screenshot displays the 'Archon 2.10 Installation (Step 4 of 10)' window. It shows the 'Testing Database Configuration' section with the following status:

- Connecting to server localhost...OK
- Selecting Database chrispro_archonuiuc...OK
- Testing Permissions:
 - CREATE: Yes
 - INSERT: Yes
 - SELECT: Yes
 - UPDATE: Yes
 - ALTER: Yes
 - DROP: Yes

Below the permissions list, it states: 'Database configuration tests complete, click next to continue.' At the bottom of the window, there are two buttons: '<- Previous' and 'Next ->'. A red arrow points from a text box on the right to the 'SELECT: Yes' line in the permissions list.

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.

Archon 2.10 Installation (Step 7 of 10)

Archon may be configured to use a number of 'packages.' Each of these packages will increase Archon's functionality.
Below, please choose the packages you wish to install. Note that you can only choose to install a package if all the packages it depends upon are also being installed. For example, you can only install the collections package if the 'creators' package is being installed. Therefore, certain options may be deselected automatically if you deselect certain packages.

Package Name	Depends Upon	Enhances	Install
research	collections 2.10		☐
collections	creators 2.10 subjects 2.10		☒
accessions	collections 2.10		☐
creators	core 2.10		☒
subjects	core 2.10		☒
digitallibrary	creators 2.10 subjects 2.10	collections 2.10	☒

<- Previous

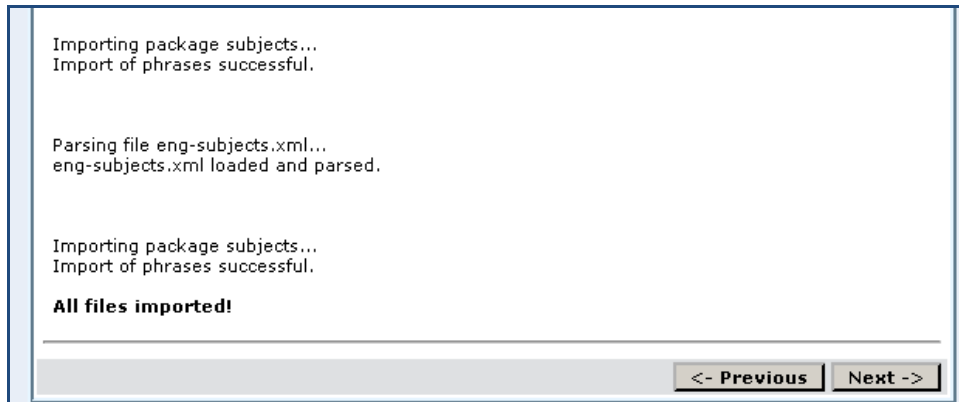
Next ->

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

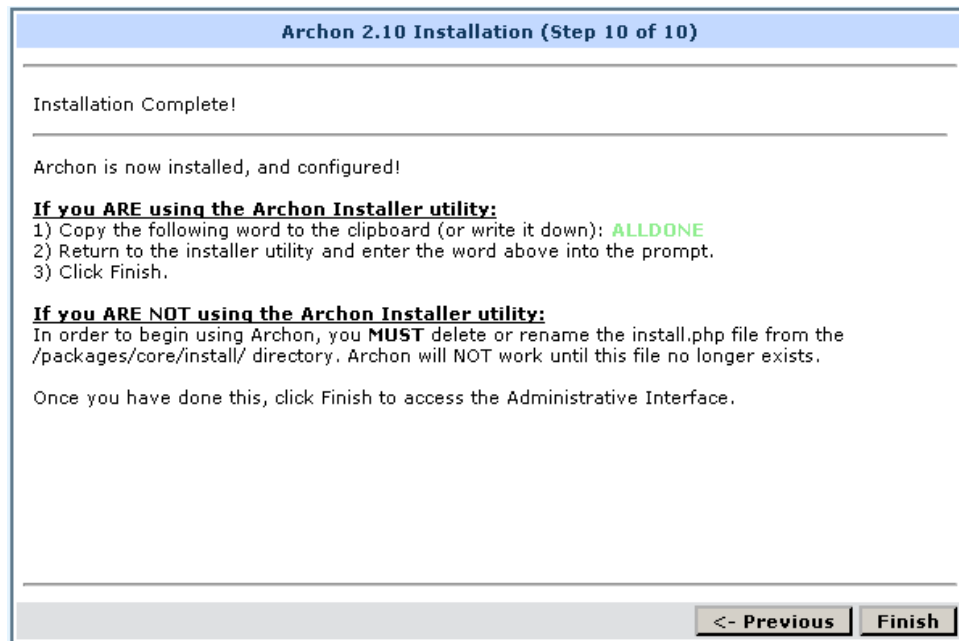
Step 9: import XML language files for administrative interface. Two languages are supplied, English and Spanish. If you are interested in translating Archon to another language, please contact us.

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]

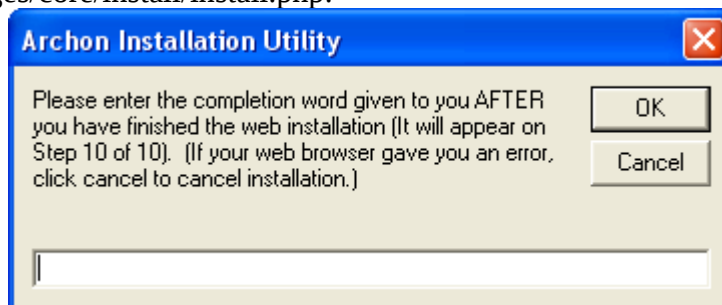


Step 10: Installation is complete. Follow the instructions on the screen carefully to finalize the installation. Archon will not run unless these instructions are completed.



Finalize the Installation

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



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.

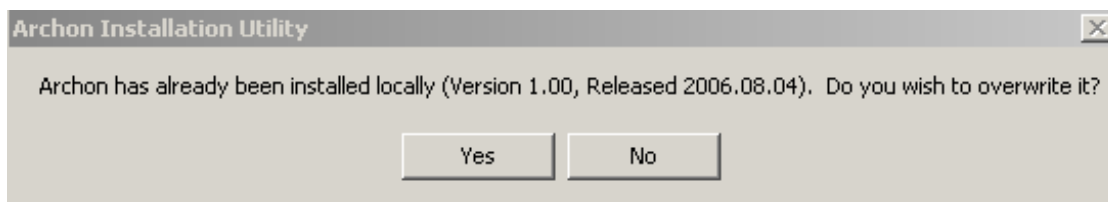
Download the install packet from the project website. Save the file on a local drive.

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."

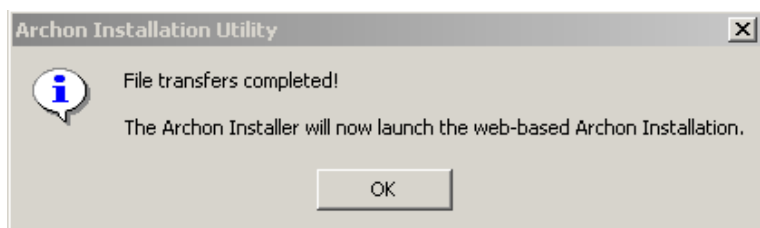
When you are ready to upgrade to Archon 2.1, click 'Install!'

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.



Complete 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 to 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.

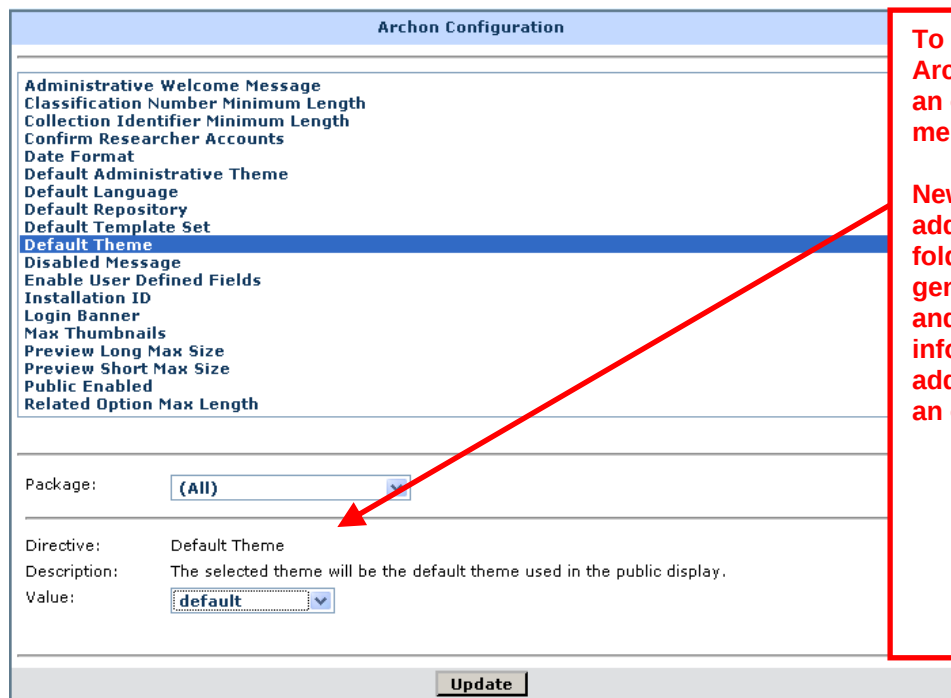
Templates control the particular data elements that appear on a particular page. They are not intended to control display properties such as layout, colors and fonts.

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.



The screenshot shows the 'Archon Configuration' web interface. A list of configuration options is on the left, with 'Default Theme' highlighted. Below this list, the 'Package' dropdown is set to '{All}'. The 'Directive' is 'Default Theme' and the 'Value' dropdown is set to 'default'. A red arrow points from the 'Value' dropdown to a red-bordered box on the right. This box contains red text explaining how to change the look and feel of the public interface by selecting an option from the pull-down menu and adding new themes by creating folders on the webserver.

To change the ‘look and feel’ of Archon’s public interface, select an option from this pull down menu.

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

Update

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 templates; 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).

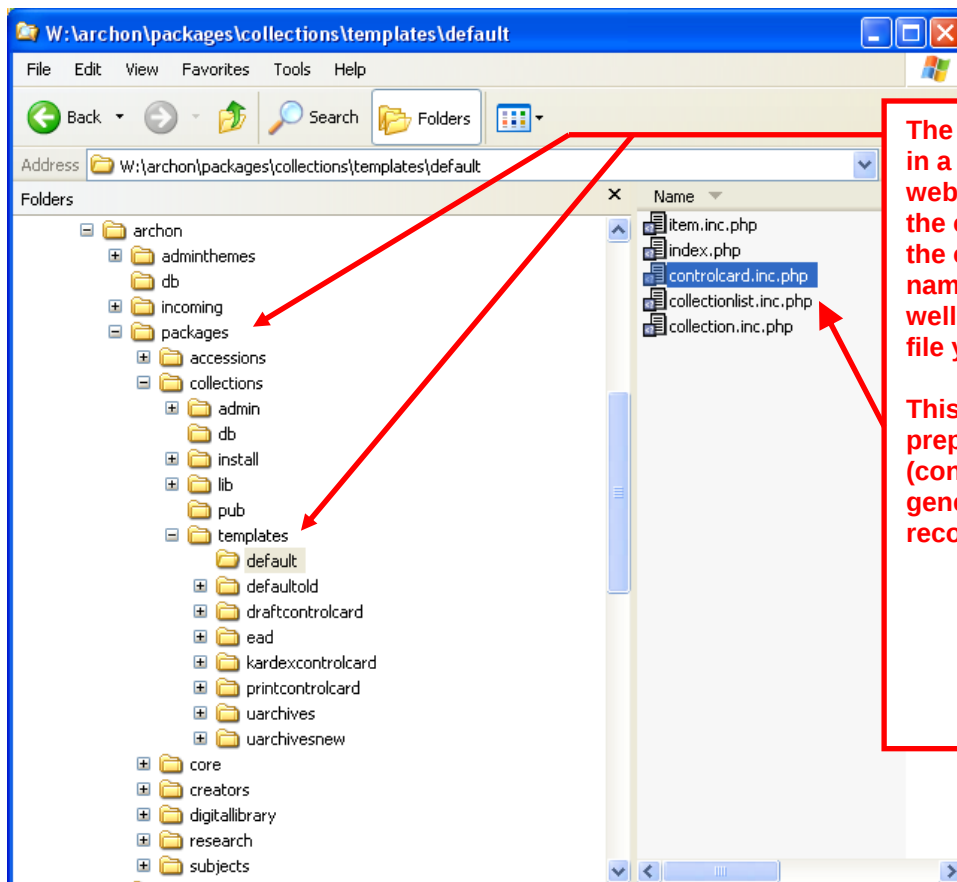
As a web application, Archon functions by evaluating parameters passed to the file index.php, found in the the root 'Archon' folder. All html output is generated by a GET or POST to index.php. index.php simply calls other files based on an evaluation of the

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

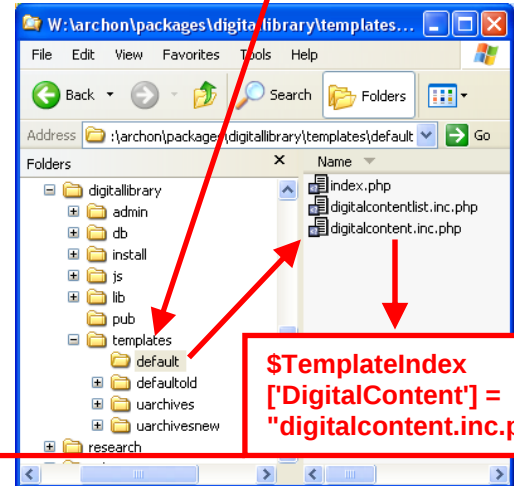
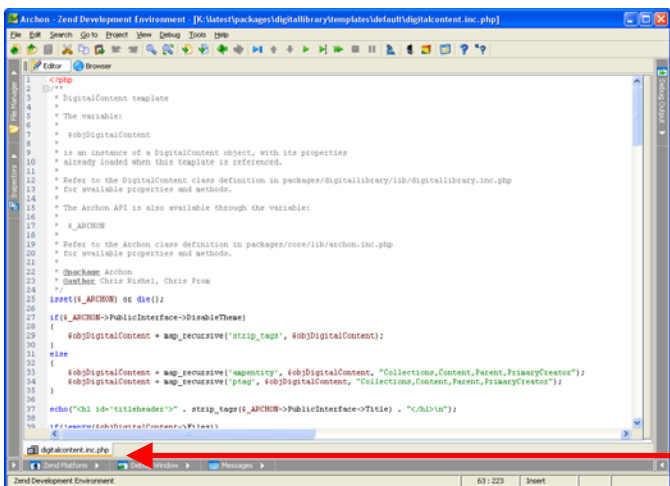
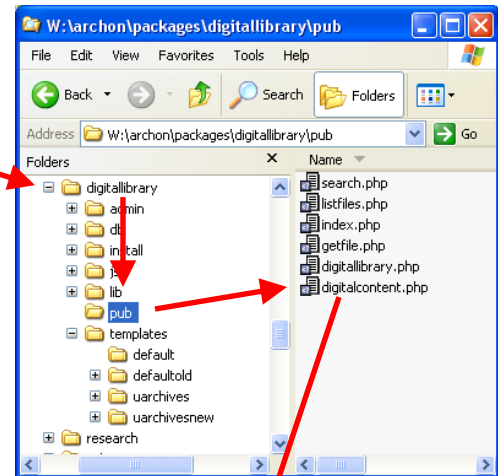
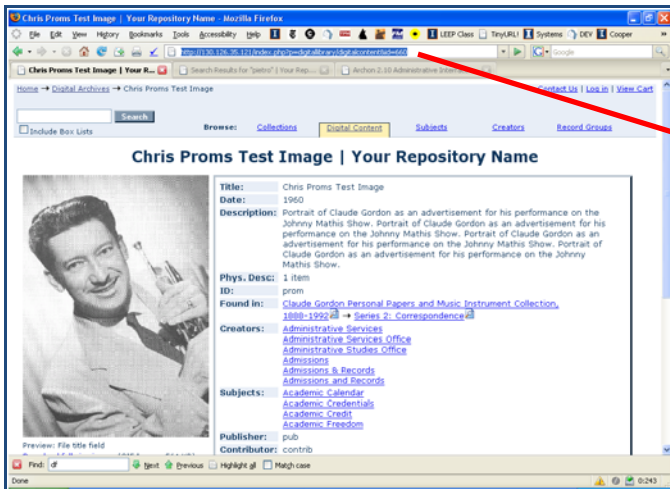
You can determine which file to edit by analyzing the querystring for a particular page. The querystring will always point to the package and to a file in the ‘pub’ folder of that package. In turn, the file in the ‘pub’ folder MAY have a template associated with it.

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 template file WILL be retained if/when you upgrade to a future release of the software.

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 the following output templates. When you create a new folder in the templates directory on the server, the new template will automatically appear as a menu item under Archon Configuration->Default Template Set.

Archon Configuration

- Administrative Style Sheet
- Administrative Welcome Message
- Classification Number Minimum Length
- Collection Identifier Minimum Length
- Database Structure Version
- Default Language
- Default Repository
- Default Style
- Default Template Set**
- Disabled Message
- Enable User Defined Fields
- Installation ID
- Login Banner
- Preview Long Max Size
- Preview Short Max Size
- Public Enabled
- Related Option Max Length
- SA Password
- Search By Classification

Directive: Default Template Set
 Description: The selected template set will be the default template set used in the output system
 Value:

Update

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.

Collection Manager:
"Factivities" (ID: 3810)

Content Manager

Collection Information

Title: "Factivities"

Enable Web Output: ☒ Yes ☐ No

Main Repository: The University of Illinois Archives

Collection Classification: 43 Natural History Survey

1 Chief's Office

Collection Identifier: 810

Sort Title: "Factivities"

First/Last Year: 1966 - 9999

Inclusive Dates: 1966-

Predominant Dates:

Type of Materials: Publications

Extent: 0.3 cubic feet

Finding Aid Author:

Template: System Default (default)

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.

7.3.5. 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.

7.3.6 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.

7.3.7 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.