



USER MANUAL

v. 1.1x

1.0 OVERVIEW OF THE SOFTWARE

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. Version 1.1 also includes a digital library capability. Digitized or electronic records can be linked to and searched alongside collection-level descriptions and finding aids.

The system allows you to input descriptive records that are compliant with archival standards. Archon's scripts automatically produce a searchable and browseable interface where archival users can access summary collection descriptions and full finding aids. The system supports creator authority records and controlled subject vocabularies and also provides an inventory tracking/location system.

In Archon, collections¹ can be grouped into record groups, subgroups, fonds, or any other classifications defined by the repository. Data can be imported into the system from EAD and MARC format. The system also exports and imports data in MARC and EAD formats. It can also import data that is in other structured formats (such as tab delimited files). Repositories can build custom websites using easily-modified HTML templates.

This documentation provides an overview of Archon for those creating descriptive records in the Administrative Interface. Specific information about how Archon is implemented at your

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.

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, Firefox, Safari, and Opera, on PC's, Mac, and Linux operating systems. 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' where you can try it out, are available at www.archon.org. There are currently two Archon Sandbox versions available at the project website. The 'live' version of UIUC's public data is available at <http://web.library.uiuc.edu/ahx/archon/>, although the Administrative Interface is available only to authorized users.

http://sandbox.archon.org/blank/	contains a blank version of the database
http://sandbox.archon.org/uiuc/	holds over 5000 collection records and selected finding aids (for the SACAM collections/Sousa Archives)

The end user interface for the 'blank' sandbox provides output using the stylesheets and templates supplied 'out of the box' with Archon. The UIUC sandbox uses the style UIUC has chosen for its data. Instructions for modifying the output are included in the separate system administrator documentation.

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 beginning in the root folder of our archon installation; e.g. www.myarchives.org/archon/.

2.1 OVERVIEW

The public website can be searched and browsed by title of collection, title of 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).

2.2 SEARCH TIPS

- The search engine looks for records containing every term you submit.
- It returns both descriptions of collections AND links to digital objects/electronic records. The hits are differentiated in the results page, so that collection descriptions are listed separately from digital library items.
- 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 records: If your system administrator has enabled classification browsing you can directly access a collection by entering its full collection identifier or record group or record series number. 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).

3.0 ADMINISTRATIVE (STAFF) INTERFACE BASICS

Archival Staff use Archon's Administrative Interface add new records modify existing collection descriptions and upload or link to digital objects. Those with sufficient authority can also use the Administrative Interface to configure Archon's system properties.

3.1 LOGIN INSTRUCTIONS

- To login as a user click 'log in' at the bottom of any of the public web pages generated by the system.

Powered by [Archon Version 1.10](#)
Copyright ©2006 [The University of Illinois at Urbana-Champaign](#)
[\[Log in\]](#)

Click the 'Log in' link at the bottom of any webpage produced by Archon to log in as a staff

- 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.

Powered by [Archon Version 1.10](#)
Copyright ©2006 [The University of Illinois at Urbana-Champaign](#)
You are logged in as: Chris Prom
[\[Admin\]](#) [\[Log Out\]](#)

To access the Administrative Interface, click the 'Admin' link in the staff view.

- In the staff view, edit figures (✎) will appear next to collection titles, subject descriptors, creator names, and selected other elements. If you wish to edit a record, click on the pencil. The Administrative Interface will load in a separate browser window or tab, and the relevant information will be preloaded for editing.

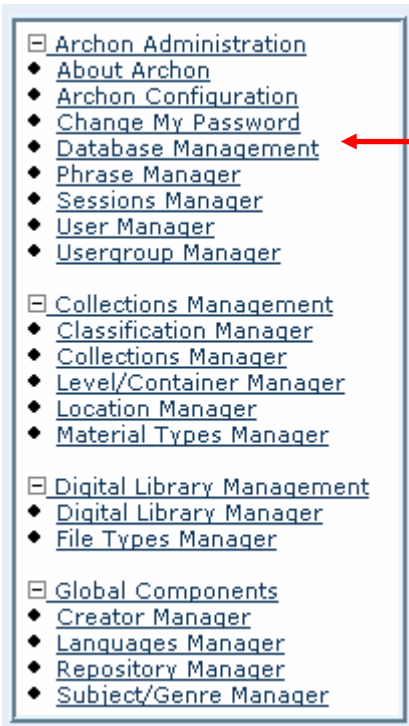
The screenshot shows a search interface on the left with a search box containing 'reston' and a 'Go!' button. Below the search box are links for 'Browse by:' including 'Collection Title', 'Subject', 'Creator', 'Archival Record', 'Group', and 'Digital Library'. The main content area shows a breadcrumb trail: 'Top → Alumni Association → Alumni →'. Below this is the title 'James B. Reston Papers, 1935-1995' with a pencil icon. To the right of the title are fields for 'Record Series Number: 26/20/120', 'Volume: 48.6 Cubic Feet', and 'Arrangement: By functional group and sub-group'. A 'Description:' section follows, containing a paragraph about James Barrett "Scotty" Reston (1909-95) and his career. A red box on the right contains the text: 'To edit the associated collection (or other relevant data), click the 'pencil' icons in staff view'. A red arrow points from this box to the pencil icon next to the collection title.

- The staff view also provides links to several staff views of the data (such as EAD and MARC) and shows the real box locations at which materials are stored, facilitating retrieval by the reference staff. Real box locations are not shown in the public view.

3.2 OVERVIEW

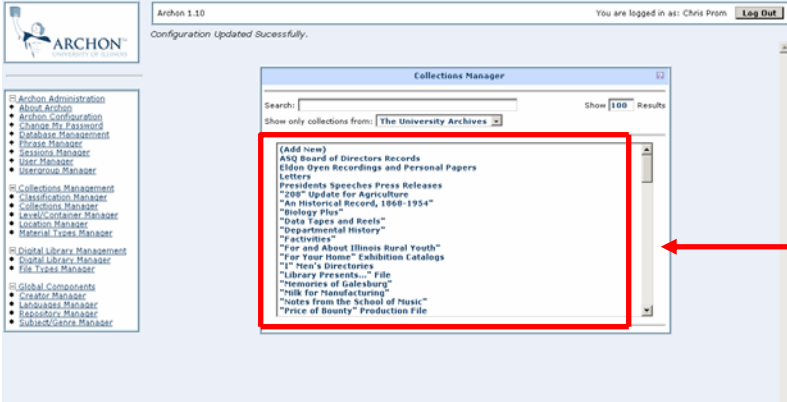
- For most features in the Administrative Interface, help buttons (?) appear in the right hand margin. Clicking the help button will provide further direction regarding the field or feature.
- Depending on the access level granted by your system administrator, some features may not be available, e.g. deleting records, managing the installation of Archon, adding new users, modifying authority records, etc.
- Clicking at item in the left navigation bar will load the selected module.

[see next page for screenshot]



Clicking at item in the left navigation bar will load the selected module (e.g. Collections Manager, Location Manager, etc.)

- Clicking an item in the central selection area will load associated information and cause it to display below. The loaded information can then be edited.



Clicking an item in the central selection area will load associated information and cause it to display for editing

- Some modules (e.g. Collection, Creator and Subject Managers) have 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. If you wish too, you can also full scroll the full list, by changing the (There may be a slight delay depending on network traffic and bandwidth.) Then click any item to load its information for editing, or hit enter to load the first item in the list.

▣ Subjects

Search Filter:

All Subjects:

- American Society of Zoologists
- History of Zoology
- Naples, Italy Zoological Stati...
- Zoology
- Zoology Department

Type in the “Search Filter” or boxes to reduce long lists to a manageable size. Then click an item to select it or apply the appropriate action

- 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’ at the bottom of module or the screen you are working on.

3.3 FOUR BASIC MODULES

- Archon contains 4 modules, each with several menu items.
- **Archon Administration:** Includes functions to manage the database, users, and system. Most, if not all of these functions are accessible only to the Archon Administrator.
- **Collections Management.** 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 and link digital objects to collections or finding aids.
- **Digital Library Manager** Upload digital objects and link them to collections or subordinate parts of collections, e.g. particular folders.
- **Global Components:** Edit information used by both the Collections Manager and Digital Library Manager. Create and edit creator, subject, and genre authority records, as well as basic identifying information regarding the repository. Changes made to authority lists will automatically propagate to associated collections and digital objects. Depending on the level of access provided by your system administrator, you may not be able to use some of these functions.

4.0 “ARCHON ADMINISTRATION” MODULE

The menu items in the Archon Administration module are the Archon Administrator (or those given permissions) to configure the Archon installation, add users, backup the system, and perform other tasks related to the administration of the system. The options below may not appear on the menus of users without privileges to view or modify the options in this area. The Archon Administration module contains 7 components.

4.1 MENU ITEMS AND FUNCTIONS

- **About Archon:** Project information and credits.
- **Archon Configuration:** Manage various technical aspects of your Archon installation. (This feature may not be available to all users, depending on the level of access provided by the Archon Administrator.)
- **Change My Password**
- **Database management:** import descriptive records in EAD, MARC and other formats. View technical information about the database, export the entire database for backup purposes, and re-import data from a backup file or using a user defined SQL script.
- **Sessions Manager:** Allows Archon Administrator to observe user access to the system.
- **User Manager:** Allows Archon Administrator to add and delete system users and to provide them a user name, password, and access level. Administrator can assign them to a usergroup at a certain permission level or use the advanced permissions editor to grant them special permissions for individual modules.
- **Usergroup Manager:** Allows the Archon Administrator to 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. Changes to a permission levels propagate changes to existing users assigned to that group (Special permissions applied to an individual user in the user manager override settings made here.)

5.0 “COLLECTIONS MANAGEMENT” MODULE

The Collections Management Module includes the main area where staff record descriptive information about collections and manage the collections. It also includes an area to create and edit a classification scheme (e.g. record group/subgroup)

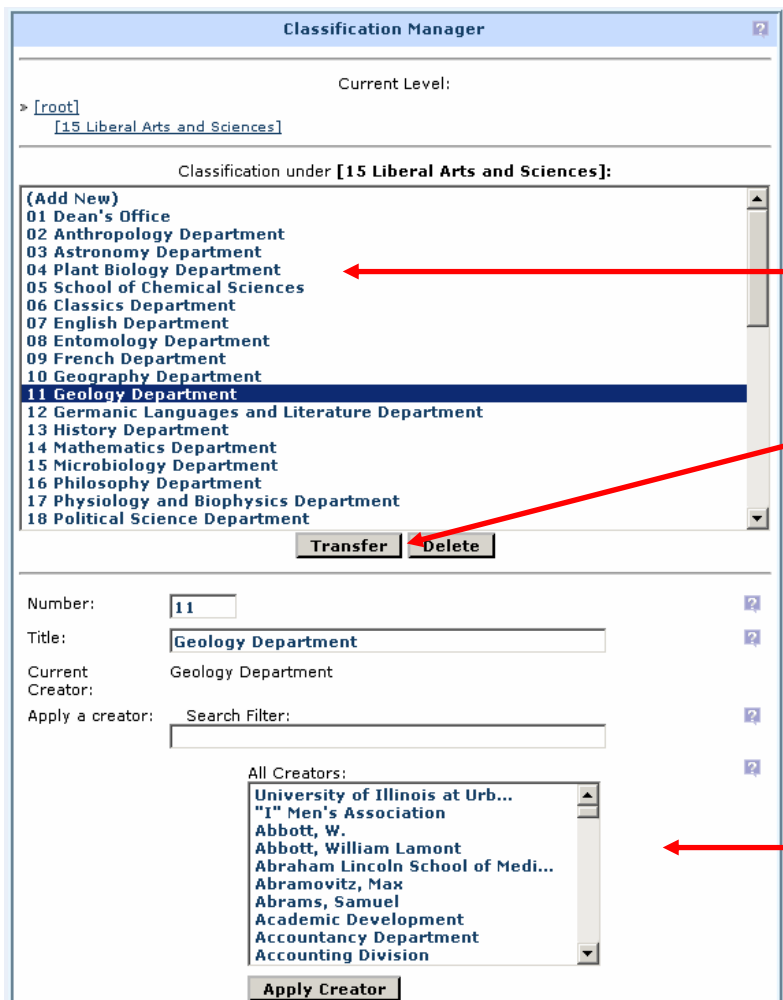
5.1 MENU ITEMS AND FUNCTIONS

The “Collections Management” Module contains five modules and one sub-module: Classification Manager, Collections Manager, Content Manager (sub-component of Collection Manager), Levels/Containers Manager, Location Manager, and Material Types Manager.

5.2 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 are linked to a record group in the ‘collections manager.’ (This component may not be available depending on the level of access provided by your system administrator.) *Use of the Classification Manager is optional.*

- *[See next page for screenshot]*



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.

Existing classifications can be moved and all associated collections will be 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'.

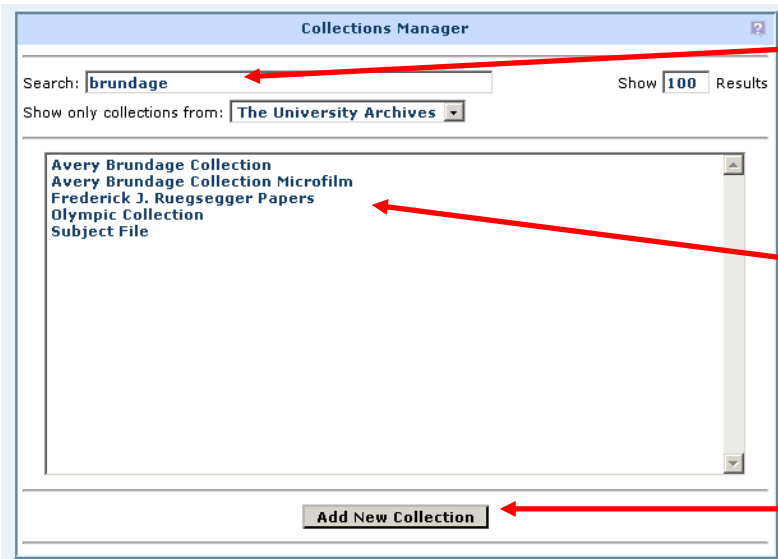
If necessary, classifications can be 'transferred' to another 'location' in the classification hierarchy. This feature is useful if, for example, you wish to update your record groups/subgroups to reflect changes in the administrative structure of your parent institution. (When a classification is transferred,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

5.3 COLLECTIONS MANAGER

You use the Collections Manager to create a new collection record or edit an existing collection record.

[See the next page for a screenshot]



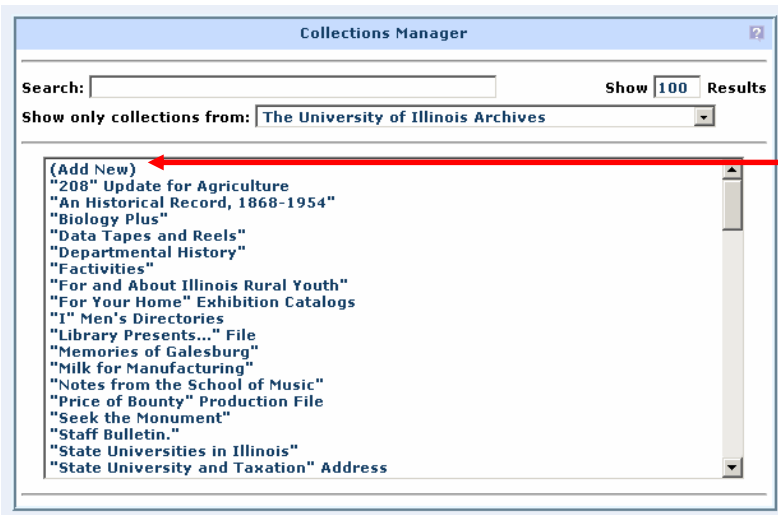
The value typed here will filter the master list of collections by searching against the title and description fields for the value entered.

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

Click this button to create a new collection level record.

5.3.1 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 or include all. Once the results have been filtered, click the appropriate title to load the record for editing

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



Add a new collection by clicking "(Add New)" in the first line of the collections manager introduction screen

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

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.

Controls the way in which the finding aid is displayed using Archon's templates system.

5.3.3.1 Enable Web Output: If 'no' is checked, the collection will not be shown to end users on the website. This can be used to develop a description that is not ready for public access.

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

5.3.3.3 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 record group/subgroup system.

5.3.3.4 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.)

5.3.3.4 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.'

5.3.3.5 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.

5.3.4 Collection-level sub-menus: Click any of the headings to expand or contract the information thereunder:
[See next page for a screen shot]

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 these headings (such as 'Location Information' or 'Collection Description') to open the associated section of the collection record and to enter the associated information.

5.3.4.1 Location Information. Track location of boxes by entering container numbers/ranges in content field. Select a main location, e.g. 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 <input type="button" value="Delete"/>
Boxes 327-	UAS: UA Stacks	18	1		4.4	Cubic Feet <input type="button" value="Delete"/>
Boxes 341-	UAS: UA Stacks	28	10		2.6	Cubic Feet <input type="button" value="Delete"/>
Boxes 342-	UAS: UA Stacks	21	3		1.6	Cubic Feet <input type="button" value="Delete"/>
Boxes 348-	UAS: UA Stacks	17	2		0.6	Cubic Feet <input type="button" value="Delete"/>

[Launch Location Manager](#)

Record room location

Record range, section, and/or shelf

Record Extent

Click a button to delete only the associated row

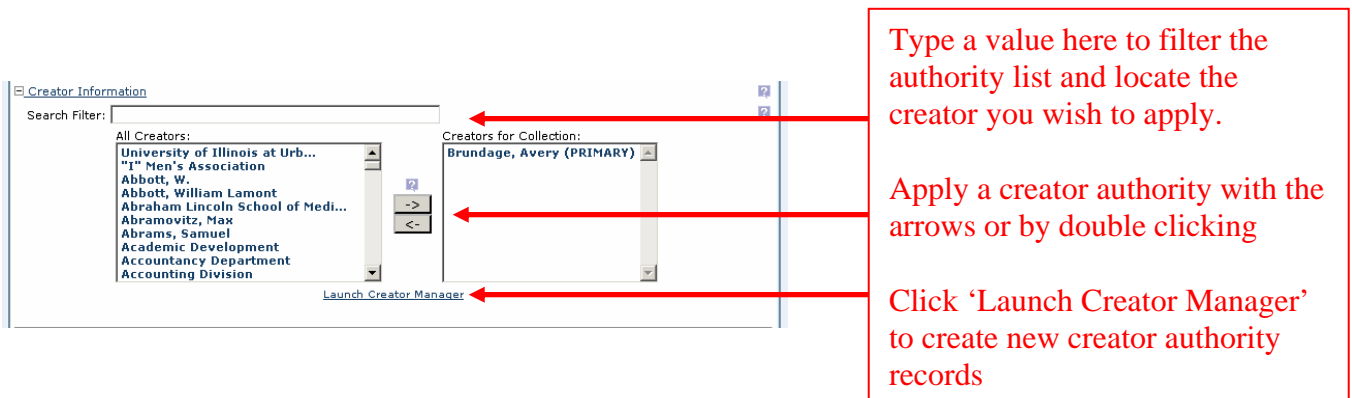
Click 'Update' after making changes to any or all rows.

Click this link to define a new room location

If you need to edit or add a room location, launch the Location Manager. (The Location Manager may not be available to all users, 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

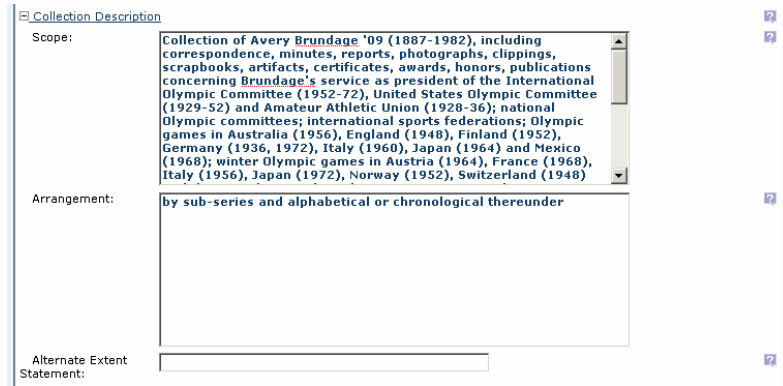
5.3.4.2 Creator Information: The left-hand box contains a list of all authority-controlled creators currently available. To filter the list, type any portion of the creator's name in the 'search' box. When you see the entry you wish to apply, double click the entry to apply it to the collection. It will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



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 him/her/it to the authority file before applying him/her/it to the collection. This can be done in the 'Creator Manager'. Click 'Launch Creator Manager' to edit an existing creator or create a new record.

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

[See next page for screenshot]



5.3.4.4 Subjects: Apply subject indexing 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 authority with the arrows or by double clicking

Click this link to create new subject authority records

(Sample faceted 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 authority system or edit information for an existing subject term, launch the Subject/Genre manager.

5.3.4.5 Genres: Using an interface similar to the subject authority, list the genres included, 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 genres are treated as a type of subject in Archon and in other authority control systems.

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

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

5.3.4.8 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.

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

In the default end-user style supplied with Archon, 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. See your Archon Administrator for proper local use of this field.

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

5.4 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, folder, items, etc within each collection. (While Archon Additional levels/containers can be defined using the level/container manager.)

5.4.1 Launching: To launch the content manager, you must first access the collection to which you wish to add content, using the Collection Manager. Then click the 'Content Manager' box at the top of the initial collection manager screen.

[See next page for a screen shot]

5.4.2 Basic Interface of Content Manager

The screenshot shows the 'Content Manager' interface for 'The Chris Prom Papers'. At the top, it displays the current container as '> [The Chris Prom Papers]'. Below this is a table titled 'Content Contained by [The Chris Prom Papers]:' with columns for 'Level/Container', 'Container Number', and 'Title/Content'. The table lists two series: Series 2 (Add New) and Series 1 (Test Series, 1999). Below the table are 'Transfer Content' and 'Delete Content' buttons. Further down are input fields for 'Level/Container', 'Level/Container Number(s)', 'Title', 'Date', and 'Scope'. At the bottom, there are 'User defined fields' including 'Title', 'Content', and 'EAD Field Type', along with an 'Add' button and a 'Return to Collection Manager' button. Red arrows point from text boxes on the right to these specific interface elements.

Content hierarchy/tree

Current Levels/Containers available for editing. Use add new to add new content at this level

Transfer highlighted levels to another point in hierarchy

Delete selected levels/containers and all materials contained by them

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

User defined fields; Title maps into EAD head for the EAD field type chosen.

Return to collection-level description.

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

5.4.3 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 adding the second series description to a sample collection

5.4.4 Current Levels/Containers available for editing:

- **Single-click** to load a row for editing, then change information in the level below.

- **Double click** a row to load its children for editing or to add a new child
- **‘CTRL-click’** to select **multiple rows**. Then delete them or transfer to a different level in hierarchy

5.4.5 Main fields available for editing:

Level/Container:	<input type="text" value="Series"/>
Level/Container Number(s):	<input type="text" value="1"/>
Title:	<input type="text"/>
Date(s):	<input type="text"/>
Description:	<input type="text"/>

5.4.6 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 divisions, within and across intellectual division, into which materials are physically stored. A 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 container 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 <c> 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’.

5.4.7 Level/Container Number:

Level/Container:	<input type="text" value="Folder"/>
Level/Container Number:	<input type="text" value="1-10"/>
Title:	<input type="text" value="Correspondence with Henry Mudge"/>
Date:	<input type="text"/>

Entering ranges and comma-separated lists will add multiple children

Entering a single numeric value will add a single child ‘underneath’ the parent level or container. Adding a range, a comma separated list, 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.

5.4.8 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.

5.4.9 Date: 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. The comma is inserted automatically.

5.4.10 Description: This field maps to the <scopecontent> element in EAD and will be output in the HTML stream as a paragraph following the title and dates, using the default style sheets, when it is encoded at the series level. Otherwise, it will be appended after the title and dates.

5.4.11 User-Defined Fields:

User defined fields:

Label/Head <small>?</small>	Content <small>?</small>	EAD Field Type <small>?</small>
(Add New)		(Select One) ▾

Data recorded '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.

5.5 LEVEL/CONTAINER MANAGER

The Level/Container Manager is used to define the Levels and Description and types of containers that will be available for selection under the "Level/Container" pull 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. These specifications will be used to determine the nesting and output of the appropriate elements and attributes in EAD form.

If the "intellectual" checkbox is checked, you **MUST** specify an EAD level to which this 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.

5.5.1 Level/Container Manager Functions

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.

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.

5.6 LOCATION MANAGER

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

5.7 MATERIALS TYPES MANAGER

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

6.0 “DIGITAL LIBRARY MANAGEMENT” MODULE

- Contains 2 components: “Digital Library Manager” and “File Types Manager”
- The digital library manager 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.
- All links or uploaded objects MUST be associated with a collection.

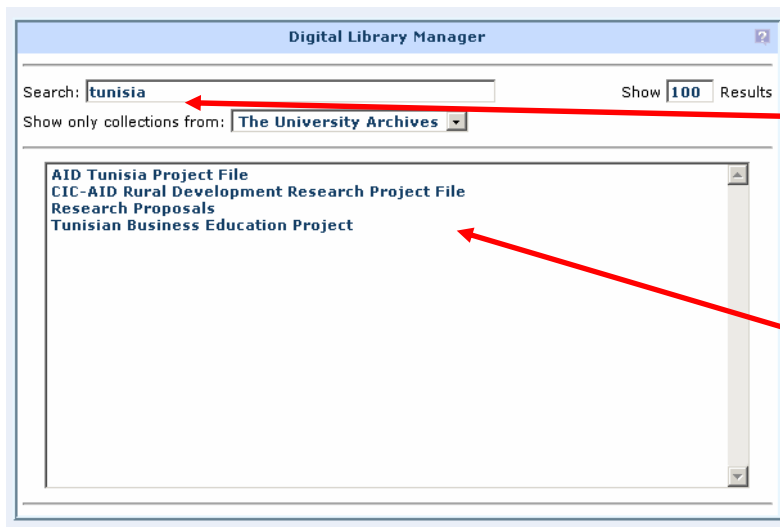
- In the public interface, access to the digital object will be automatically linked to the collection record or finding aid and all digital objects will point back to their parent collection.

6.1 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 associate the object you wish to upload (the collection will be pre-selected if you enter directly from the content manager).

6.1.1 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 to only those where the title or description contains the entered text.

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 following screen.

[See next page for screenshot]

The screenshot shows the 'Digital Library Manager' interface. At the top, there is a list of existing digital objects with the following entries: '(Add New)', 'Blackhawk Statue', and 'Lorado Taft as a Young Boy'. Below the list is a 'Delete' button. Underneath is a form for adding a new object with the following fields: 'Title' (text input), 'Identifier' (text input), 'Date' (text input), and 'Associated Collection' (dropdown menu). The 'Associated Collection' dropdown is currently set to 'Lorado Taft Papers' with a sub-selection of 'Series 1: Mounted Photograph File'. At the bottom of the form is an 'Add' button.

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

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

Shows the collection and (optionally) series, boxes, files or items to which the object is linked in the content manager.

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

6.1.2 Adding Detailed Digital Object 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, but clicking the title in the list. You will then be presented with the following additional options

The screenshot shows the expanded view of the file upload screen. It includes the same form as the previous screenshot, but with additional options below the 'Associated Collection' dropdown: 'Content URL' (text input), 'Upload Files' (checkbox), 'Detailed Description' (checkbox), 'Creator Information' (checkbox), 'Subjects' (checkbox), and 'Languages' (checkbox). At the bottom of the form is an 'Update' button.

Use this field to link to an external resource

Open this section to upload a file or files comprising the object directly into Archon

Use of these sections is optional; creators, subject and languages are drawn from the controlled list and work as under the Collection Manger

Expanded view of file upload screen showing dialog for uploading multiple files comprising a single object



After a digital object has been uploaded, creator and subject authorities can be linked by opening the relevant sections.

6.2 FILE TYPES MANAGER

The File Types Manager is used to define the types of files allowed for upload into Archon. (The File Types Manager may not be available to all users, depending on the level of access provided by your system administrator.)

7.0 “GLOBAL COMPONENTS” MODULE

The Global Components area includes authority control systems which manage information that can be applied to multiple collections and/or digital library items.

In the default installation, no subject authorities are pre-loaded, except for languages.

7.1 CREATOR MANAGER

Add and edit creator authority records using the fields listed. 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. Information can be added or edited in the Collections and Classification Managers, the 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 field, use ENTER to separate paragraphs. For formatting in the public interface, HTML can be used in this field. It will be stripped out before the information is output in EAD or MARC format.

7.2 LANGUAGES MANAGER

The languages manager comes pre-loaded with ISO 639-2 alpha-3 codes for languages. The languages can be applied to collections and collection descriptions and will be inserted into MARC and EAD records.

7.3 REPOSITORY MANAGER

Record the basic identifying information specific to your repository. Information is inserted automatically into MARC and EAD output. To ensure interoperability, the identification code MUST be taken from the MARC Code List for Organizations, for US organizations.

7.4 SUBJECT/GENRE MANAGER

Add and edit subject authority records. If you wish to edit an existing subject/genre record, 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. If the subject/genre is LCSH compliant, mark it as such.

You can create a multipart subject heading by double-clicking the heading and adding a facet. 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. Faceting can be applied at an unlimited number of faceted levels, although in practice 2 or 3 levels should be sufficient for most uses.

Using the collection manager, the subject terms created here can be applied to either a collection. '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.

8.0 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.

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://web.library.uiuc.edu/ahx/archon/controlcard.php?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.

Style: The basic attributes and ‘look and feel’ of your Archon public interface. Styles are modified by changing the files in the styles folder of your archon root directory. See the Archon Administrator Manual for full instructions.

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 rendered and displayed to users. For example, the template controlcard.inc.php in the default template folder determines which specific archon fields are displayed to the user, and in which order, when the controlcard.php file is called. The Default Template Set is defined by an Archon Administrator, but specific templates may be applied to an individual collection by using the Collection Manager.