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Archon User Guide for USF Special Collections

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A USER GUIDE

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University of South Florida Tampa Library Special Collections

* Guide also includes a copy of the “Best Practice Guidelines for the Implementation of EAD Version 2002 in Florida Institutions” (March 2006)
1. Special Collections uses the web-based tool Archon to create EAD-encoded finding aids. To use the library’s instance of Archon, an Archon administrator (i.e., the head archivist or the systems analyst) must create a login for each individual charged with using the program.

2. Once a login and password have been established, users may gain access to the tool by signing in at https://www.lib.usf.edu/Archon. (Note: This is a secure connection that cannot be accessed outside of the library.)

3. After logging in, click “Admin” (towards the bottom of the page) in order to access the program’s administrative components.

a. Clicking “Admin” will take you to the following page:
4. To add or edit collection information, select “Collections Manager” from the “Archon Packages” drop down menu.

5. The next screen will display a partial listing of all collections currently included in Archon. If a collection’s name is not readily apparent, search for it using the “Search” box. To edit existing finding aids, either select the collection name from the list presented or from the items retrieved upon searching. Click “Add New” to begin creating a new EAD-based finding guide.
6. After clicking “Add New,” you will begin creating an EAD-based finding aid by inputting collection information. Most of the information uploaded to Archon will be taken directly from existing finding aids. Finding aids either can be found as electronic documents on the Special Collections shared drive (T:\ Collection Descriptions and Guides\Collection Guides) or as hard copies in the Special Collections department.

   a. Complete the “Collection Information” form with the same information appearing on the finding aid being utilized to create the EAD. Some information that may not appear on the finding aid include “Collection Classification,” “Collection Identifier,” and “Predominate Dates.”

      i. The “Collection Classification” field currently is not being used.


   b. Enter “Sort Titles” by “last name, first name” for individuals and in direct order for corporate or organizational entities.

   c. The number of boxes comprising a collection will be included in the “Extent” field. Information pertaining to the collection’s linear footage will be entered on a separate screen.

<table>
<thead>
<tr>
<th>Add New Collection:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Collection Information</strong></td>
</tr>
<tr>
<td><strong>Title:</strong></td>
</tr>
<tr>
<td><strong>Enable Web Output:</strong></td>
</tr>
<tr>
<td><strong>Collection Classification:</strong></td>
</tr>
<tr>
<td><strong>Collection Identifier:</strong></td>
</tr>
<tr>
<td><strong>Sort Title:</strong></td>
</tr>
<tr>
<td><strong>First/Last Year:</strong></td>
</tr>
<tr>
<td><strong>Inclusive Dates:</strong></td>
</tr>
<tr>
<td><strong>Predominant Dates:</strong></td>
</tr>
<tr>
<td><strong>Extent:</strong></td>
</tr>
<tr>
<td><strong>Finding Aid Author:</strong></td>
</tr>
</tbody>
</table>

[Click for information about specific fields.]
7. Click next to proceed to the following screen:

   ![Screen shot of Archon interface](image)

   a. This section allows users to add more descriptive, administrative information about collections within a number of different expandable/collapsible fields. Currently, all fields - except “Location Information” – are being used by the department.

8. The vast majority of collection creators (i.e., the originating body/ies that generated a collection) have been uploaded to Archon. Under “Creator Information,” use the “Search Filter” box to locate specific creators. If a creator is not included among those entered previously, they may be added by using the “Launch Creator Manager” feature. (See #9a for more detailed information about the “Creator Manager”).

   ![Creator Information interface](image)
9. When selecting from the “All Creators” listing, highlight the appropriate/applicable name and double click or click . The name then will appear in the right-hand column (“Creators for Content”). Typically, only one creator will be designated per collection. (Note: The arrows may be used to select or deselect names from the “Creators for Content” box.)

To add additional information about the creator, such as a biographical/historical note or a bibliographical reference, click “Launch Creator Manager.”

a. A pop-up window will open for the “Creator Manager”: 
b. Within the Creator Manager, search for the newly added or previously input creator name. Once found, highlight the name by clicking on it; enter information accordingly. When you have finished inputting the needed information, click “Update” to return to the “Collection Information” screen.

i. LCNAF Compliant: Check the Library of Congress (LC) Authority Records (http://authorities.loc.gov/) to determine whether the information entered is LC compliant.)
10. “Collection Description” is the next field requiring data. Add information, as provided on the finding aid, accordingly. You will notice the “Alt Extend Stmt” (Alternate Extent Statement) field. Here, you will note any information regarding the collection’s linear footage or other, information not previously entered that relates to the collection’s size (as referred to in #5c).

11. The next section, “Subjects,” is somewhat less forthright than others. Begin by searching for the subject headings that best describe the collection’s content. If the heading does not exist, click “Launch Subject Genre Manager” to create new subject headings in Archon.
a. To input basic Library of Congress subject headings (LCSH), click “Add New” on the “Subject/Genre Manager” screen. Input the subject as well as the subject type and source. Click “Add” to add the heading to the list of subjects currently included in Archon.

b. For Library of Congress subject headings with subdivisions or other added information, such as dates, genres, or forms, follow the instructions for creating basic subject headings (refer to #11 a). To add subdivisions and more extensive information to the subject heading, click “root” (after creating the basic subject heading); this will take you back to the “Subject/Genre Manager” screen. Double click the newly added or previously entered subject heading to begin adding subdivisions.
i. In the following example, a geographic subdivision is being added to the subject heading “Detective and mystery stories, American.” [Note: The term “American” also was added by using the following instructions.]

ii. After clicking on the first heading created (“Detective and mystery stories”), subdivisions can be added by entering the term (i.e., subject), subject type, and subject source within the previously established subject heading. At the top of the screen, you will notice a subject heading hierarchy based on the number of subdivisions added to said heading. Upon entering each subdivision, click “Add.” When you have completed entering all subdivisions, close the pop up window.

Notice the hierarchy
c. For terms that are not subject headings authorized by the Library of Congress, choose “USF Tampa Library Special Collections” as the “Subject Source.” Finish by clicking “Add.”

12. Once all applicable subject headings have been created in Archon, return to the main input screen (“Collection Information”) to search for the headings and add them to the collections they describe. To search for more complex subject headings, enter the base heading in the “Search Filter” box (e.g., “Crime” for “Crime- United States- Periodicals”) for retrieval.
After creating and selecting the appropriate subject headings for a collection, your screen may resemble the image below:

13. After completing the “Subjects” field, proceed to the “Genres” section. Enter any applicable information. [Note: This field will not be used for all finding aids.]
14. Under “Languages,” select all languages represented in the collection. If a language is not listed, it can be added by launching the “Languages Manager.”

Step 1

Step 2

Step 3

a. When the “Languages Manager” pop up window opens, type the name of the new language or dialect (the language/dialect you are adding) into the input box. [Note that it is not necessary to include the language abbreviation.] Click “Add” to include the language among the list of previously established languages.

15. Proceed to the “Restrictions” section to add pertinent information regarding collection access. “Access/General” is the only field used consistently across finding aids; other fields may be used on a collection-by-collection basis.
16. Proceed to “Acquisition Information,” entering information as available on the finding aid. The fields used most often are “Initial Date Acquired,” “Source,” and “Method.”

<table>
<thead>
<tr>
<th>Acquisition Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Date Acquired:</td>
</tr>
<tr>
<td>Source:</td>
</tr>
<tr>
<td>Method:</td>
</tr>
</tbody>
</table>

Appraisal Info:

Accruals/Additions:

Custodial History:
17. Proceed to “Related Materials” to include information about other archival collections created by the originating body or collections of similar interest. For example, the USF Tampa Library Special Collections maintains the “The Dion Boucicault Theatre Collection.” A related collection - The University of Kent, Canterbury’s “Boucicault Collections” - would be listed in this section.

Most finding aids will not include “Related Materials Information.” All guides, however, will include a “Preferred Citation,” the format of which is identical across all collections.

<table>
<thead>
<tr>
<th>Related Materials Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related Mat’s:</td>
</tr>
<tr>
<td>Related Mat. URL:</td>
</tr>
<tr>
<td>Related Pubs:</td>
</tr>
<tr>
<td>Separated Mat’s:</td>
</tr>
<tr>
<td>Orig/Copy Notes:</td>
</tr>
<tr>
<td>Orig/Copy URL:</td>
</tr>
<tr>
<td>Preferred Cit.:</td>
</tr>
</tbody>
</table>
18. “Other Information” primarily includes data not available/included on the non-EAD based finding aid or that does not fit into other fields of the Archon “Collection Information” form. Notes, such as the one in the following example, may be enhanced by adding individual or departmental contact information, depending on the type of data made available. “Other URL” can be utilized for links to digital collections pages or other, applicable websites that provide additional collection information.

![Other Information form](image)

A container listing currently does not exist. Please contact a member of the Special Collections Department for assistance with this collection.

19. Proceed to “Finding Aid Information” and complete the fields as necessary. Most often, the only fields utilized are “Processing Info” and “Written In.”

![Finding Aid Information form](image)

Processing Info: Incomplete

Revision History:

Publication Date: __/___/____

Pub Note:

Written in: (Select One)
20. Once you have finished creating your EAD-based finding aid in Archon, click “Update” to save it.

If you are creating an EAD for a collection that does not have a container listing, proceed to #27. Otherwise, continue following the instructions below in order to add a collection’s container listing to an EAD.

### Container Lists

The collection being used as an example for creating EAD-based guides in Archon does not have a container listing; regardless, we will go over the steps for adding collection contents to Archon.

21. After updating the collection (refer to #20), return to the top of the main input screen (“Collection Information”) and click the “Content Manager” button.
22. The next screen will display as follows, with the highlighted portion - “Series - 1 - (Add New)” appearing prior to the addition of any data.

   a. Begin adding the container list by selecting the appropriate “Level/Container” – Box, Folder, Item, Series or Subseries. [Note: The majority of Special Collections’ finding aids will list items by folder within each box. Select finding aids may list series and sub-series.] Be sure to use “Level/Container Number(s)” for box and series information; “Level/Container Number(s)” will not be utilized for folder and item listings.

   b. Fill in remaining items as needed. The “User Defined Fields” currently are not being utilized and will be left blank.
This is what your screen might look like after adding a few series:

23. In order to create items within the series or other arrangement scheme created, select the appropriate series name by double clicking it.
24. You will be directed to a new “Current Level/Container” page that will allow you to input hierarchical arrangement schemes. The following shows folders that have been created inside of Series 1. You can construct a variety of hierarchies within the container listing (i.e., Box – Folder – Item), depending on the organization and level of description made available on the finding aid.

25. When finished, select “Return to Collection Manager” to go back to the main input screen.
26. At this point, be sure to click “Update” again (at the bottom of the screen) to ensure that no collection information is lost.

If you do not need to generate an EAD DTD for the finding aid you have just created in Archon, you may log out of the program.

To view and/or save the EAD DTD, proceed to #27.

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EAD Output

27. To export a finding aid as an EAD/XML document, you will need to return to the public view of Archon (https://www.lib.usf.edu/Archon) and click the link for “Collection Title.”
28. Next, click on the letter that corresponds with the sort title of your collection ("Step 1"), and select the collection from the list appearing on the next screen ("Step 2").
29. Scroll down to the bottom of the finding aid and select “EAD/XML” link under “Staff Views.”

30. A page, similar to the one below, will appear:
31. From the browser menu, click “View” and select “Page Source” from the drop down menu to view the EAD DTD.

32. A new window will appear:
33. To save the EAD DTD, click “File” and “Save Page As…”

   a. According to the “Best Practices Guidelines for the Implementation of EAD Version 2002 in Florida Institutions” (http://www.fcla.edu/dlini/OpeningArchives/new/FloridaEADguidelines.pdf), each “EAD finding aid document should be unique within each institution (i.e., no institution should have two EAD documents with the same filename).”

      i. An example of a Special Collections EAD filename might be as follows: “fhmA27.xml,” where “A27” is the collectionid and “fhm” is the USF Tampa Library’s OCLC code.

34. After saving the file, locate and “Open With” Microsoft office Word or a similar program with web document editing capabilities.

35. Edit the document in accordance with the “Best Practices Guidelines for the Implementation of EAD Version 2002 in Florida Institutions” and, if appropriate, submit to FCLA for inclusion in the Archives Florida database (http://palmm2.fcla.edu/afl/).