ICA-AtoM 1.1 Training Workshop

Welcome

This is the default homepage for ICA-AtoM. ICA-AtoM is a fully web based archival description application that is based on International Council on Archives (ICA) standards. AtoM is an acronym for Access to Memory.

The ICA and its project collaborators are making this application available as open source software to provide archival institutions with a free and easy to use option for putting their archival collections online. See the about page to learn more about the ICA-AtoM project. See MIGAN to view the Directory of Caribbean archival institutions. MIGAN - Memory of the Islands - A Gateway for Archival Networking, is implemented under the ICA-AtoM open source software.

The information found in this training instance of ICA-AtoM is based on actual archival records housed in the University of British Columbia Library - Rare Books and Special Collections Division. This training instance of ICA-AtoM is for educational purposes and is intended to support ICA-AtoM workshops.

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Introduction to ICA-AtoM 1.1

ICA-AtoM, which stands for International Council on Archives - Access to Memory, is a web-based, free software application for standards-based archival description in a multi-lingual, multi-repository environment. It is designed to support ICA standards such as General International Standard Archival Description (ISAD(G)), International Standard Archival Authority Record for Corporate Bodies, Persons and Families (ISAAR[CPF]), International Standard for Describing Institutions with Archival Holdings (ISDIAH), and International Standard for Describing Functions (ISDF). ICA-AtoM allows you to describe your archival holdings in context. You will not create an archival description in isolation: you will link it to a description of a creator and a description of an archival institution, resulting in a complete account of what the records are, who created them and what archives they belong to.

See http://ica-atom.org for more information about the application.

How these Tutorials Work
This series consists of ten tutorials which are to be completed in the order listed:

1. Log in

2. Browse and Search
   2.1 Archival Records
   2.2 Authority Records
   2.3 Archival Institutions
   2.4 Functions
   2.5 Subjects
   2.6 Places
   2.7 Digital Objects

3. Edit /Add Archival Institution
4. Edit /Add / Import Authority Record
5. Edit / Add/ Import Archival Description
6. Attach Digital Objects
7 Add/ Import Subject Terms
8. Physical Storage
9. Add Functions
10. Administer ICA-AtoM

For More Information and to provide Feedback:
If you would like more detailed instructions on using ICA-AtoM in general, you can consult the on-line user manual at http://www.ica-atom.org/docs/index.php?title=User_manual. If you have any comments, questions or suggestions about the tutorials, the user manual or the software itself, please go to the ICA-AtoM discussion list at http://googlegroups.com/group/ica-atom-users.
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Tutorial 1.0: Log in

In this tutorial you will learn how to log into ICA-AtoM. To add or edit content in ICA-AtoM, you need to log in.

1.0 Start at ICA-AtoM Homepage

1.1 Click the log in link in the user menu (located in the upper right-hand corner of your screen)
For this workshop you will log in as an Administrator. This will allow you to add and edit archival institution records in addition to archival descriptions and authority records. It will also allow you to add terms and functions.

1.2 In the Log in screen enter the following data:

1.2.1 In Email type demo@example.com

1.2.2 In Password type demo

1.2.3 Click Log In
You are now logged in. Note that the following items now appear on your screen:

1) a log out link

2) a “my profile” link (which takes you to screen where you can edit your login and password)

3) a menu bar, which you will use to add and edit descriptions

ICA-AtoM is now customized to your User Role as an Administrator. The main menu bar is now visible.

To log out, click the log out link in the user menu, ICA-AtoM will return you to the homepage with view-only access. If a time-lapse of more than 10 minutes occurs during data entry, ICA-AtoM will automatically log you out and you will need to log back into the program. If this happens, simply repeat the steps in this tutorial.
Tutorial 2.0: Browse and Search

In this tutorial you will learn how to use the browse and search features and to navigate some of ICA-AtoM’s menus and links.

2.1 Browse archival descriptions

2.1.1 Use the browse menu to browse complete lists of various types of records. The browse menu is a horizontal list directly below the search box. In the browse menu, click archival descriptions.

By default, the results are displayed ten at a time and sorted in the order of recent changes. In this example, the Alphabetic sort order has been selected by simply clicking on the grey text.

By clicking on a blue link, you will be taken directly to the archival description view page.

2.1.2 Click Harold Pritchett fonds listed under Title
You are now in the archival description view page for the Harold Pritchett fonds. The description provides contextual information about the archival materials and is arranged into hierarchical levels (fonds, series, files, items). In ICA-AtoM the data elements used for describing archival records are derived from the ICA's General International Standard Archival Description (ISAD).

Try scrolling to the bottom of the screen to read the entire fonds-level description (the example below is only a partial representation of the description).
2.2 Search for archival descriptions

Use the search box to find descriptions in ICA-AtoM that contain text matching a search query. The search box is located over the main menu on all ICA-AtoM pages, including the home page.

2.2.1 Type “membership cards” into the search box. Be sure to use the quotation marks.

2.2.2 Click the search icon (a magnifying glass).

Your screen will list each description, showing title, scope and content, reference code, dates, repository and 'part of'. Clicking on the blue links will take you to the full descriptions. To return to the list of search results use the back button in your browser (not shown).
2.2.3 Note that the search term “membership cards” was entered using quotations. This meant that the two words were searched as a phrase. Entering membership cards without quotations would have resulted in the default OR boolean operator being used. The search box in ICA-AtoM can accommodate a number of search types.

Try the following more advanced searches:

- membership and not cards
- workers and “membership cards”
- workers and not “membership cards”
- union* and workers
- union* and not labour

2.2.4 You can refine your search further by searching on specific fields. Try the following searches, being sure to type them exactly as they are shown (no capital on the field name, no space after the colon):

- title:union
- repository: “University of British Columbia Library Rare Books and Special Collections”
- scopeandcontent:workers
- union* and not scopeandcontent:workers

Notes on Boolean Operators:
AND searches for records containing both of the words and narrows the search.
OR searches for records containing either of the words and broadens the search.
AND NOT searches for records containing the first term but not the second term.
The asterisk * may be used to truncate a search term. This means that work* will search for work, works, workers, working, etc.
2.3 Browse Authority Records

Return to the homepage by clicking on the “Training Instance” text at the top of the screen, or by clicking on the “Home” text in the upper righthand corner of the screen.

2.3.1 In the Browse menu click Authority Records.

In ICA-AtoM, authority records are collections of information about actors – corporate bodies, persons, or families – who interact with archival materials, typically as creators. The data elements used to describe authority records are based on the ICA's International Standard Archival Authority Record for Corporate Bodies, Persons and Families (ISAAR).
2.3.2 You are viewing a list of all available authority records. The default setting is to list authority records in order of recent changes made to the records. You may select Alphabetic ordering instead by clicking on the grey text link on the left side of the screen.
2.4 Search Authority record

The authority record browse screen also provides you with the choice of searching within authority records.

2.4.1 Type *john doe* into the search box located at the bottom of the screen and then click the black Search Authority record box to initiate the search.
Your search for *john doe* should return one authority record, titled *Doe, Jane (1920-1997 ; historical collector)*.

2.4.2 Click on the blue link under the Name column to go to the authority record view page.
2.4.3 Alternatively, you can return to the homepage and type “john doe” into the main search box and hit return or click on the magnifying glass to initiate the search. Be sure to use the quotation marks.

The search result for “john doe” provides a concise view of the descriptive record(s) that contain a reference to the search term.
2.5 Browse Archival institutions

In ICA-AtoM the data elements used to describe archival institutions are based on the ICA’s International Standard for Describing Institutions with Archival Holdings (ISDIAH).

2.5.1 Return to the homepage and click *Archival institutions* from the browse menu.

![Archival institutions browse menu](image)

The browse results provide a list of available archival institutions. In this tutorial there is only one archival institution. Later in the tutorials you will create an archival institution and add it to the list.

![Archival institution browse results](image)

2.5.2 Under the name column, click *University of British Columbia Library Rare Books and Special Collections* in blue text.
ICA-AtoM brings you to the Archival institution view page.

Note that a listing of archival holdings within the institution is available in the context menu at the right side of the screen. Remember to scroll to the bottom of the screen to read the full description of the archival institution.
2.6 Search Archival Institution

2.6.1 While in the archival institution view page, locate the holdings search box in the context menu on the right and type *logging*. Click the magnifying glass to initiate the search.

Note that the search has been limited to the term *logging* within the holdings of *University of British Columbia Library Rare Books and Special Collections*. The search is not conducted on records held outside of this specific archival institution.
For reference purposes only, screenshots have been included in this training manual from the MIGAN site using ICA-AtoM. Here is a list of archival institutions and a description of the National Archives Curacao.

**Browse archival institutions**

<table>
<thead>
<tr>
<th>Name</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Archives Curacao</td>
<td>June 14, 2011 5:06 PM</td>
</tr>
<tr>
<td>Archives départementales de la Martinique</td>
<td>November 12, 2010 2:13 AM</td>
</tr>
<tr>
<td>Jamaica Archives and Records Department</td>
<td>November 12, 2010 1:09 AM</td>
</tr>
<tr>
<td>Anguilla Library Services</td>
<td>November 5, 2010 9:44 PM</td>
</tr>
<tr>
<td>BERMUDA ARCHIVES</td>
<td>November 5, 2010 9:39 PM</td>
</tr>
<tr>
<td>NATIONAL ARCHIVES OF GUYANA</td>
<td>November 5, 2010 9:30 PM</td>
</tr>
<tr>
<td>Archives Nationales d’Haiti</td>
<td>November 5, 2010 9:25 PM</td>
</tr>
<tr>
<td>Government of the Virgin Islands</td>
<td>November 5, 2010 9:23 PM</td>
</tr>
<tr>
<td>Grenada Public Library &amp; Archives</td>
<td>November 5, 2010 9:19 PM</td>
</tr>
<tr>
<td>Archives départementales de la Guadeloupe</td>
<td>November 5, 2010 10:55 AM</td>
</tr>
</tbody>
</table>

**View archival institutions**

**National Archives Curacao**

<table>
<thead>
<tr>
<th>Identifier</th>
<th>NA 599 9 CUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorized form of name</td>
<td>National Archives Curacao</td>
</tr>
<tr>
<td>Type</td>
<td>National</td>
</tr>
<tr>
<td>Contact information</td>
<td></td>
</tr>
<tr>
<td>Scharlooweg 77-79</td>
<td></td>
</tr>
<tr>
<td>Willemstad</td>
<td></td>
</tr>
<tr>
<td>Curacao</td>
<td></td>
</tr>
<tr>
<td>Netherlands Antilles</td>
<td></td>
</tr>
<tr>
<td>Telephone</td>
<td>+599 9 4614866</td>
</tr>
<tr>
<td>Fax</td>
<td>+599 9 4616794</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:na@nationalarchives.an">na@nationalarchives.an</a></td>
</tr>
<tr>
<td>URL</td>
<td><a href="http://www.nationalarchives.an">www.nationalarchives.an</a></td>
</tr>
</tbody>
</table>

**Organization**

No results
2.7 Browse functions

A function is a type of entity that describes activities linked to records creation, maintenance and use. Functions in ICA-AtoM are linked to archival descriptions, authority records and other functions. In ICA-AtoM the fields for describing functions are sourced from the ICA's International Standard for Describing Functions (ISDF).

2.7.1 Navigate to the homepage and click **functions** in the browse menu.

The browse function list will present all available functions. The default is set to recent changes. You can select **Alphabetic** to change the sort order.

2.7.2 Under the Name column, click ** Strikes (labor action)** in the blue hyperlink text
ICA-AtoM sends you to the ISDF function view page. Note which related resources share this function.
2.8 Browse by Subject Term

In ICA-AtoM, subjects are controlled-vocabulary terms grouped in a taxonomy and used as access points in archival descriptions.

2.8.1 Return to the homepage and click subjects in the browse menu.

The result is a browse list of all available subjects.

2.8.2 Under the subjects list, click the blue term “logging”.

![ICA-AtoM Training Instance](image)

![Browse Subjects](image)
ICA-AtoM will show you a list of descriptions containing the subject term “logging” and will indicate the fonds to which each description belongs. Scroll to the bottom of the screen to see the full listing.

2.8.3 To view a description, click on one of the blue links. For this exercise, click on *I.W.A District Council No.1 fonds*. 
Scroll down the page and note that this description has been indexed with the terms *Logging*, *Forestry* and *Strikes (labor)*.

2.8.4 To view a list of other records containing the subject term *Strikes (labor)* click on the blue link text.
Your screen now shows two archival descriptions that contain the subject term *Strikes (labor).*

2.8.5 To return to a complete list of subjects, click **subjects** in the browse box, just as you did at the beginning of this exercise.
2.9 Browse by Place

2.9.1 You can browse for descriptions indexed by place (geographical location) the same way you browsed for descriptions indexed by subject term. In the browse box, click places.

Your screen will show a list of place terms on the left and the number of descriptions containing each place term on the right.

2.9.2 Click on the blue link text for British Columbia.
ICA-AtoM shows you the list of archival descriptions that include the place name “British Columbia”.

2.9.3 Click on the blue link text *International Woodworkers of America, Western Canadian Regional Council No.1 fonds* and scroll to the bottom of the description where Place access points are listed.
2.10 Browse Digital objects

Digital objects are computer files that can be uploaded into and displayed by ICA-AtoM. They include scanned images, digital photographs, sound and moving image files, and other scanned or born-digital items.

2.10.1 Navigate to the homepage and click *digital objects* in the browse menu.

2.10.2 A list of available digital objects is provided. Click *Image* in blue text under the Name column.
A gallery of thumbnail references is provided. The fonds that the image belongs to is listed as “part of”.

2.10.3 Click *Photograph of Harold Pritchett*.

2.10.4 Scroll to the bottom of the archival description view page to see all the metadata related to the image.
Tutorial 3.0: Edit/Add Archival Institution

In this tutorial, you will create an Archival Institution Record.

3.1 To locate an Institution's record go to the home page and Click archival institutions in the Browse menu.

ICA-AtoM will take you to a list of all repositories.

3.2 Click on the blue link text University of British Columbia Library Rare Books and Special Collections to go to the archival institution's view page.
3.3 In the view page, take time to scroll down and review the entire description of the archival institution, *University of British Columbia Library Rare Books and Special Collections*. 

---

**University of British Columbia Library Rare Books and Special Collections**

- **Identifier:** 001-UBSC
- **Authorized form of name:** University of British Columbia Library Rare Books and Special Collections
- **Other form(s) of name:**
  - UBC Special Collections
  - UBC RBSC
- **Type:** University

**Contact information**

- **Primary contact:** Irving K. Barber Learning Centre, 1951 East Mall, Vancouver, British Columbia, Canada, V6T 1Z1
- **Telephone:** (604) 822-2521
- **Fax:** (604) 822-9587
- **Email:** rare.books@ubc.ca
- **URL:** http://www.library.ubc.ca/spcoll

**Geographical and cultural context**

As a division of the University of British Columbia Library system, Rare Books and Special Collections supports both the academic mission of the university and the research needs of the wider public.

**Administrative structure**

The department forms a division within the library of the University of British Columbia. The department is divided into two sections, once focusing on archival and manuscript materials and the other on rare books.

**Records management and collecting policies**

The department’s primary collecting activities focus on materials related to all aspects of the history of British Columbia, both before and after its organization as a British colony and later a Canadian province. Additionally, the department collects materials that complement existing holdings, which are particularly strong in Canadian history; Canadian, English, and children’s literature; cartography, including not only western Canada but maps of the Edo-period Japan and European atlases dating from the...
The Edit button appears at the bottom of view pages. The Delete and Add new buttons provide the option to delete an institution's description and/or add a new description for another archival institution.

3.4 Click Edit and you will see an editing screen. Edit pages allow users to add, edit and delete the contents of archival institution descriptions. In edit mode ICA-AtoM displays all fields in a record for data entry.

3.5 On the left of each area is a grey arrow, click arrows to expand sections to review data entry forms or click on the blue link text. At this point in the tutorial do not alter the data in the fields.
3.6 Return to the homepage and hover the cursor over the **ADD** menu until the drop-down list appears. *Hint: make sure you do not click on the ADD menu as this will result in the edit menu for Archival descriptions.*

3.7 Select and click **Archival institutions**
3.8 Start at the top of the edit screen and click the grey arrows to open each area and begin data entry.

Note that data entry fields marked with a red asterisk are required elements according to the ICA standards.

In the following exercise you will create a new description for an archival institution, Port Moody Archives. Each step is explained and all the required data is provided for you. Once you are comfortable with the process, feel free to input additional data in fields that are not included in this tutorial.
3.9 In Identifier type *PMA* (acronym for Port Moody Archives)

3.10 In Authorized form of name, type *Port Moody Archives*.

3.11 In Type select *Community* from the drop-down menu. A drop-down list menu is a list of data-entry options that appears below certain fields in edit pages. Values are drawn from controlled-vocabulary terms, authority records and default data contained in ICA-AtoM's database tables.

3.12 Notice that when you click on the data entry window a tooltip appears. Tooltips are online text designed to assist users to enter data in edit pages. Tooltip text is derived from the standard on which the edit templates are based.
In this step you will add a mailing address to the archival institution's description.

3.12 Click on contact area

3.13 Enter data as follows:

3.13.1 In street address type 18 Williams Street

3.13.2 In city type Port Moody

3.13.3 In region/province type British Columbia

3.13.4 In country type or select Canada

3.13.5 In postal code type X0X 0X0

3.13.6 In contact person type Your Name (for example, I would type Jessica Bushey)

3.13.7 In contact type type Archivist
3.14 To save and view the record, click the create button.

Everything looks good! Continue editing.

3.15 Click the Edit button
3.16 Click on Access area and enter data as follows:

3.16.1 In opening times type *Monday – Friday: 9:00am – 3:00 pm*

3.16.2 In accessibility type *Port Moody Archives is accessible for users with disabilities.*

Note the small horizontal lines below each of these fields. These lines allow you to expand the size of the box by clicking on them and pulling them downward with the mouse. This feature appears under all free-text fields in ICA-AtoM; note that there is no limit to the amount of text you can put in free-text fields.
3.17 Click on Services area and enter data:

3.17.1 In research services type *Port Moody Archives (PMA) staff are available to assist researchers in locating archival or published materials and to advise on research questions.*

3.17.2 In reproduction services type *Please contact the reference archivist with requests for reproduction of archival records.*

3.17.3 In public areas type *The Port Moody Archives (PMA) has a reading room with public access computer terminals.*
3.18 Click on Control area and enter data:

3.18.1 In Status select *Final*

3.18.2 In Level of detail select *Minimal*

3.18.3 In Dates of creation, revision and deletion type *August 24, 2011*

3.18.4 In Language type *English* (you must type the first two letters to activate the auto complete)

3.19 To save and view the record, click the Save button at the bottom of the screen.
Congratulations! You have finished this tutorial.
Tutorial 4.0: Add an Authority record

An authority record is a body of information about a person, family or organization responsible for creating archival records. For each new creator you need to add an authority record. TIP: before you add a new authority record always check to make sure that it doesn't already exist.

4.1 Click authority records in the browse menu. This will take you to a list of all authority records.

4.2 Type *thurston-flavelle and mill* into the search box and then click search authority record black box.
4.3 You will not retrieve any results. Now that you know that there is no existing authority record for Thurston-Flavelle Mill you can add one. Start by hovering your cursor over *ADD* to activate the drop-down menu.

4.4 Select and click on *Authority records* from the drop-down list.

See next page for data entry.
4.5 Click identity area

4.6 In Type of entity, select Corporate body
4.7 In Authorized form of name type *Thuston-Flavelle Mill.*

4.8 To close this information area, click *identity area*. Note that any time you are editing a record in ICA-AtoM, you can click on these blue information area links to open and close them.

4.9 Click the create button at the bottom of the screen to save and view your authority record.
4.10 Click description area and enter the following data:

4.10.1 In Dates of existence type 1912-1954.

4.10.2 In History type In 1905 Emerson Lumber was built by J.S. Emerson on leased waterfront property in Port Moody east of the Canadian Pacific Lumber Company’s Port Moody mill. The mill office was located near Rocky Point Park in Port Moody and cut western red lumber and shingles exclusively. On June 11, 1908 a half share in the mill was purchased by Perry Douglas Roe and Robert Abernathy for $250,000. It was incorporated on July 27, 1908 as the Emerson Lumber Company Limited. On October 1st, 1912 the mill was purchased by Robert Thurston and Aird Flavelle and renamed the Thurston-Flavelle Mill. In 1955 the mill was sold to Canadian Collieries Ltd. but was still called Flavelle Cedar. In 1995 International Forest Products (Interfor) bought Flavelle Cedar and modernized the mill. It reopened in 2000 and is still known as Flavelle Cedar.

4.10.3 In Places type Port Moody
4.11 Click control area and enter the following data:

4.11.1 In Description identifier type *PMA-AR001*

4.11.2 In Institution identifier type *Port Moody Archives*

4.11.3 In Rules and/or conventions used type *ISAAR(CPF)*

4.11.4 In Status type *Final*

4.11.5 In Level of detail type *Full*

4.11.6 In Dates of creation, revision and deletion type *Created August 24, 2011*

4.11.7 In Languages type *English*
4.12 To save and view the authority record, click the **Create** button

![View authority record](image)

**Thurston–Flavelle Mill**

<table>
<thead>
<tr>
<th>Type of entity</th>
<th>Corporate body</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorized form of name</td>
<td>Thurston–Flavelle Mill</td>
</tr>
<tr>
<td>Dates of existence</td>
<td>1912-1954</td>
</tr>
</tbody>
</table>

**History**

In 1905 Emerson Lumber was built by J.S. Emerson on leased waterfront property in Port Moody east of the Canadian Pacific Lumber Company’s Port Moody mill. The mill office was located near Rocky Point Park in Port Moody and cut western red cedar lumber and shingles exclusively. On June 11, 1908 a half share in the mill was purchased by Perry Douglas Roe and Robert Abernathy for $250,000. It was incorporated on July 27, 1908 as the Emerson Lumber Company Limited. On October 1st, 1912 the mill was purchased by Robert Thurston and Aird Flavelle and renamed the Thurston–Flavelle Mill. The first 3 months were profitable but business slowed down and the mill had to shut down for 3 months over Christmas. In 1955 the mill was sold to Canadian Collieries Ltd. but was still called Flavelle Cedar. Weldwood of Canada Ltd. purchased the mill in 1964 and Flavelle Cedar became a division of Weldwood of Canada, Ltd. It had 350 employees. In 1966 the production of shingles and shakes was discontinued. The mill changed hands again in 1995 when International Forest Products (Interfor) bought Weldwood of Canada Ltd. and Flavelle Cedar. The mill was modernized in 1995 with a major rebuild. In 1998 Flavelle Cedar closed but was reopened in 2000 when it was purchased by Mill and Timber. Currently (2009) the mill has approximately 50 employees as is still known as Flavelle Cedar.
ICA-AtoM provides an import functionality that can be used to import archival descriptions, authority records, archival institutions and terms. The following filetypes can be imported: EAD (hierarchical archival descriptions and associated authority records, archival institution descriptions and taxonomy terms), EAC (authority records) and SKOS (hierarchical taxonomies).

4.13 To Import an Authority Record. Return to the homepage and click Authority records from the browse menu.

4.14 In the browse results screen, hover your cursor over Import and click on XML.
4.15 The import window will open, click Browse button and select the folder on your desktop entitled “TutorialFiles” and select the file entitled flavelle-aird-dundas.xml.

4.16 Click Import when ready.

4.17 Once import is complete, click View Authority Record

You have successfully imported the authority record for Aird Dundas Flavelle.
4.18 Return to the homepage and click Authority records from the Browse menu.

You should see a listing of the authority record you added for Thurston-Flavelle Mill and the authority record you imported for Aird Dundas Thurston.

Congratulations! You have finished this tutorial.
Tutorial 5.0: Add archival descriptions

In this tutorial you will create archival descriptions for a fonds, a series and a file. You will link these descriptions together in a hierarchy and will also link them to their related authority and archival institution records.

5.1 Hover your cursor over the Add menu and click Archival descriptions from the drop-down menu
5.2 Click Identity area
5.3 In the Identity area enter data as follows:

5.3.1 In Identifier type MS-0495

5.3.2 In Title type *Aird Dundas Flavelle fonds*

5.3.3 In Type select *Creation* and in Start type *1903* and in End type *1964*

5.3.4 In Level of description select *Fonds*

5.3.5 In Extent and medium type *54 cm of textual records; 31 photographs*
5.4 Click Context area and enter data:

5.4.1 In Name of creator(s) select *Flavelle, Aird Dundas*

5.4.2 In Repository select *Port Moody Archives*
5.5 Click Content and structure area and enter data:

5.5.1 In Scope and content type  The fonds consists of a diary, correspondence, account journals, a ledger, share certificates, a minute book, photographs and school certificates of Flavelle and of the Thurston Flavelle Lumber Mill.

5.6 Click Create (the default setting is draft)
Note that when you selected a creator, ICA-AtoM created links to the creator's record (the authority record you added earlier). It also inserted the creator's biographical sketch from the authority record, and added the name of the creator as a name access point. Note the draft status of the fonds level description.

Note that the Reference code of the archival description “MS-0495” is now preceded by the Reference code of the Archival Institution “CA PMA”.

![View archival description](image)
5.7 Click Edit to edit the archival description. Select *published* from the drop down list at the bottom and click Save. Your archival description can now be viewed by all users. Draft status provides the opportunity for archivist/managers to review and approve work done by assistants and volunteers using ICA-AtoM prior to publishing the content to the general public.

![Image of ICA-AtoM interface](image-url)

*Image Description:*
- **Fonds MS-0495 – Aird Dundas Flavelle fonds (draft)**
- **Archival Institution:** Port Moody Archives
- **Creator:** Flavelle, Aird Dundas
- **Publication status:** draft
- **Source language:** English
- **Export options:** Dublin Core 1.1 XML, EAD 2002 XML

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5.8 To create a Series-level description in this Fonds. Click Edit

5.9 In the edit screen Click the Identity area to add data:

5.9.1 In Add new child levels type into Identifier 001 in Level select Series in Title type Mill Photographs

5.10 Click Save
In the archival description view page the red alert box identifies the missing elements from the series-level archival description. Note that the series title is now available in the context menu on the right in a tree hierarchy beneath the fonds-level.

An alternate method for creating lower level descriptions is to click the Add new button while in the archival description screen for Aird Dundas Flavelle fonds. This action will add a new child record to the fonds.

5.11 Click Edit in the bottom menu.

See next page for data entry.
5.12 Edit Identity Area and enter the data:

5.12.1 In Date(s) under Type select Creation and in Start type 1919 and in End type 1930

5.12.2 In Extent and medium type 8 photographs
5.13 Click Content and structure area and enter data in area:

5.13.1 In Scope and content type *Series consists of photographs depicting Aird Dundas Flavelle's life at the Thurston- Flavelle Lumber Mill.*

5.14 Change status to published and click Save.
5.15 To import an Item-level description, hover your cursor over the Import tab in the blue menu.

5.16 Select XML from the drop down list.

5.17 Click Browse and select the folder on your desktop entitled “TutorialFiles” and select the file entitled crew-at-upper-camp-in-woods.xml

5.18 Click the Import button when file is ready

5.19 Once the Import is complete (ignore any warnings) click View Archival description
The result of your import is an Item-level archival description in draft status. If you review the context menu on the right side of the screen you will see that the Item needs to be moved into the Arid Dundas Flavelle fonds hierarchy.

5.20 To move the item-level description into the series it belongs to, refer to the next page for instructions on using the move function.
5.21 Click *Aird Dundas Flavelle fonds*

5.22 Click *Mill Photographs* (this is the series you want to import your item-level description into)

5.23 Click Move here to initiate move
Congratulations! You have completed this tutorial.

Review the context menu on the right side of the screen and you will see that the item-level archival description is nested within the series it belongs to. This is an example of an hierarchical archival description from fonds through series to item-level.
Tutorial 6.0: Link Digital Object to archival description

In this exercise you will learn how to link a digital image to an item-level archival description.

6.1 In the item-level archival description view, scroll to the bottom of the screen and click Link digital object.
6.2 Click Browse and select the folder on your desktop entitled “TutorialFiles” and then select the JPEG file on your desktop entitled loggers_camp_141.jpg

6.3 Click Create

View the imported digital image, which is now linked with its archival description. Remember to scroll to the bottom of the page to read all the descriptive information.
In this exercise you will learn how to import more than one digital object into an existing archival description.

6.4 Navigate to the *Mill Photographs* Series-level archival description and click Import digital objects.
6.5 In the Import multiple digital objects screen, click Select files.

6.6 On your desktop, select the folder entitled “TutorialFiles” and then select two JPEG files entitled `board_of_directors_141.jpg` and `certificate_141.jpg`.

6.7 In Level of description select Item from the drop-down list

6.8 In Digital objects under Title type `image 02` and under Title type `image 03`. Remember item/image 01 has already been linked to the archival description in the previous exercise.

6.9 Click Import
6.10 Click on Image 01 in the context menu on the right side of the screen and you will see that the archival description is missing required elements.
6.11 Click Edit to add required data to the item-level description with an attached digital object.

See next page for data entry.
6.12 Click Identity area to enter data:

6.12.1 In Identifier type 02

6.12.2 In Title type Board of directors

6.12.3 In Date(s) under Type select Creation and in Start type 1922 and in End type 1922

6.12.4 In Level of description select Item from the drop-down list.

6.12.5 In Extent and medium type 1 photograph: b&W; 16x24 cm.
6.13 Click Context area to enter data:

6.13.1 In Name of creator(s) type *Flavelle, Aird Dundas*

6.13.2 In Repository type *Port Moody Archives*

6.14 Click Save
The item-level archival description is complete and the digital image is linked.
Navigate to the second digital object you imported entitled *Image 03* and view the archival description. Note the red warnings. This item-level archival description is missing required elements.
6.16 Click Identity area to enter data:

6.16.1 In Identifier type 03

6.16.2 In Title type Members certification

6.16.3 In Date(s) under Type select Creation and in Start type 1924 and in End type 1924

6.16.4 In Level of description select Item from the drop-down list.

6.16.5 In Extent and medium type 1 photoprint: b&w; 21x26 cm.
6.17 Click Context area to enter data:

6.17.1 In Name of creator(s) type *Flavelle, Aird Dundas*

6.17.2 In Repository type *Port Moody Archives*

6.18 In Publication status select *published* from the drop-down list.

6.19 Click Save.
The item-level archival description is complete and the digital image is linked.
6.20 Navigate to the fonds-level archival description for *Aird Dundas Flavelle fonds* and on the right side of the screen in the context menu you will see your 3 digital images in the thumbnail viewer. Try moving the scroll ball left and right to view the thumbnails.

Congratulations! You have completed this tutorial.
Tutorial 7.0: Add / Import Subject Terms

In this tutorial you will learn how to edit an existing archival description and add name access points and subject access points. You will be using terms that exist and creating new terms.

7.1 Select the item-level archival description entitled Item 02 - Board of directors

7.2 Click Edit at the bottom of the screen.

7.3 Click Conditions of access and use area to enter data:

7.3.1 In Conditions governing access type Photograph too damaged to handle

7.3.2 In Physical characteristics and technical requirements type There is some water damage to photograph. Conservation treatment is needed.
7.4 Click Access points and enter data:

7.4.1 In Subject access points type *lab* and wait, the auto-complete data entry field will search for the term in the database taxonomy and supply the text labor unions. This is because the term already exists.

7.4.2 In Place access points type *Port Moody*

7.4.3 In Name access points type *Burrows, John Dee* then click on the white space below the data entry box. A new data entry box will appear, type *Simpson, Carl* and in a new box, type *Williams, David*. *(Tip: If you make a mistake you can select the “x” to delete individual names).*

7.5 Click Save. The item-level archival description should now include the added information. Note that the access points you entered are now hyperlinks. Click *Burrows, John Dee*
The resulting Authority record for Burrows, John Dee requires additional elements to comply with ISAAR; however, we will leave it for now. The important point is that an authority record has automatically been created from the name access point your added to the item-level archival description earlier in the tutorial.

7.6 Use the return arrow on your browser to go back to the item-level archival description.

7.7 Select the subject access point labor unions. The hyperlink should result in a view screen with a list of fonds that contain the subject term labor unions.
In this exercise you will create a hierarchical subject taxonomy and add some of the terms as access points to your resource descriptions. Unlike the previous exercise, the term does not exist.

7.8 Navigate to the homepage and hover your cursor over Add until the drop-down list appears. Click Terms.

7.9 Enter data to create a new term:

7.9.1 In Taxonomy type *Sub.* Wait for the auto-complete menu to show Subjects, then select.

7.9.2 In Name type *business and commerce* 

![Add new term](image)

Enter the rest of the data as follows:

7.9.3 In Use for type *business, commerce*

7.9.4 Click Relationships. In Add new narrow terms type into separate fields the following terms:

- Sole proprietorship
- Partnership
- Corporation
- Cooperative

7.10 Click Create. Your saved taxonomy term should look like this. Note that you are building a hierarchy of terms which can be easily navigated in the context box on the right.

![View term](image)
In this exercise you are going to add a subject term as an access point in an archival description.

7.11 Navigate to the item-level archival description for Board of directors and click Edit.

7.12 Select Access points and in Subject access points type bus and wait for auto-complete menu then select business and commerce.

7.13 Click Save. The new subject term is now included as an access point in the archival description.
In this exercise you will learn how to import a taxonomy term.

7.14 Navigate to the homepage and click Taxonomies

7.15 At the bottom of the List of taxonomies click Next to see the second page.

7.16 Click Subjects

7.17 In the List Subjects screen select Import SKOS
7.18 Click Browse and select folder entitled “TutorialFiles” from desktop and then select XML file entitled *immigration.xml*

7.19 Click Import

7.20 After Import is complete Click View Subjects

The Subject term immigration and emigration has been added to the Subjects Taxonomy
7.21 In the Subjects term list Click immigration and emigration to view the term in detail.

![Image of the Subjects term list showing immigration and emigration term]

7.22 Navigate to the homepage and in the main search box type *immigration*.

7.23 Click on the title *Harold Pritchett American immigration status*. The search result located the term immigration in the title of a file-level archival description.

![Image of the search result for immigration showing Harold Pritchett American immigration status]

Results 1 to 1 of 1
7.24 Click Edit at the bottom of the archival description screen.

7.25 Click Access points and in Subject access points type imm and wait. The auto-complete menu will present the new subject term immigration and emigration for you to select.

7.26 Click Save. The subject access point has been successfully added to the file-level archival description. Your archival description now contains a subject access point.

Congratulations! You have completed this tutorial.
Tutorial 8.0: Link Physical Storage

In this tutorial you will learn how to link physical storage to a fonds-level description and an item-level description. You will also learn how to view all the archival resources within a single box.

8.1 Navigate to the Aird Dundas Flavelle fonds archival description and Click Link physical storage
8.2 In Name type *Box 05*

8.3 In Location type *Aisle 04. Shelf 02. Main Repository*

8.4 In Container type select *Hollinger box*

8.5 Click the *Save* button
Your archival description now contains the physical storage location. Note that you can enter more than one storage location if needed.

Now assign Item 01 – Mill workers at Thurston Flavelle Lumber Mill to the same box:

8.6 Navigate to the item-level description by clicking on the link in the context menu. You may have to expand the series to see the Item.

8.7 Click Link physical storage
8.8 Since you have already created a record for Box 05, you can now select it from the drop-down list under add container links (duplicate links will be ignored).

8.9 In Type select *Folder* from the drop-down list.

8.10 Click *Save*.

8.11 View the item-level archival description and note that in the context menu box the Physical Storage is linked.

8.12 To see the contents of Box 05, click on the box link in the context menu. See results on next page.
The View physical storage screen shows a list of Box 05's contents.

Congratulations! You have completed this tutorial.
Tutorial 9.0: Browse /Add function

In this tutorial you will browse an existing function and create a function.

9.1 Navigate to the homepage and in the browse menu Click Functions

The Browse Function screen provides a list of all available functions.

9.2 Click Strikes (labor action)
9.3 Viewing the function lets you see a description of the function and the resources that share a relationship with the function. Click on the Title of the first related resource.
The function is included in the archival description of this file.
9.4 To create a function navigate to the homepage and hover your cursor over Add.

9.5 Click Functions from the drop-down list.

9.6 In the Edit Function screen Click Identity area and enter data:

9.6.1 In Type select *Activity* from the drop-down list. Note that the ISDF tooltips are available to help you.

9.6.2 In Authorized form of name type *Preparing logs*
9.7 In the Edit Function screen Click Context area and enter data:

9.7.1 In Dates type 1918-1955

9.7.2 In Description type Before the logs are cut they are inspected, debarked and bucked. Each length is inspected for defects. Conveyor belts transfer logs into mill. Bark is removed. Buck saws cut the logs to lengths predetermined by the mill. These three activities were staffed and overseen by the woodworkers union. Over time these activities were divided and inspection was privatized. The activities of debarking and bucking remain with the woodworkers union.

9.8 Click Control area and enter data:

9.8.1 In Description identifier type CA-PL01

9.9 Click Create
9.10 Click Edit and Select Relationships area to enter data:

9.10.1 In Related authority record Click Add new. A dialog box will appear to enter data.

9.10.2 In Authorized form of name type *Thu* and wait for the drop-down list of authority records, select *Thurston-Flavelle Mill*

9.10.3 In Nature of relationship type *One of the main activities conducted at the Thurston-Flavelle Mill was preparing logs.*

9.10.4 In Date Start type *1920* and Date End type *1944*

9.10.5 Click Submit
9.11 In Related resources click Add new.

9.11.1 In Title type *Fonds* and wait for the drop-down list of archival descriptions. Select *Fonds MS-0495- Aird Dundas Flavelle fonds*.

9.11.2 In Nature of relationship type *Correspondence discusses the cost of preparing logs and methods to streamline the activities.*

9.11.3 In Date Start type 1938 and in Date End type 1942.

9.11.4 Click Submit.

9.12 Click Save.
9.13 Click on the blue resource links and you will see that the function “preparing logs” has been added to the Thurston-Flavelle Mill authority record and the function “CA-PL01-Preparing logs” has been added to the Aird Dundas Flavelle fonds archival description.

9.14 Navigate to the homepage and select Functions from the Browse menu. Preparing logs has been added to the list of available functions.

![Recent changes](image)

Congratulations! You have completed this tutorial.
Tutorial 10: Administer ICA-AtoM

In this tutorial you will be carrying out some basic administrative activities – managing user accounts, changing description templates, creating a new static page, adding a menu, changing user interface labels and translation functions. All of these administrative functions are accessed via the Admin tab in the main menu bar.

10.1 Navigate to the homepage and hover your cursor over Admin and Click Users

10.2 View the List of users and Click Add new to enter data:

10.2.1 Select Basic info and in Username type Volunteer 01
10.2.2 In Email type volunteer@archives.com
10.2.3 In Password type ABC123, retype the same thing in Confirm password
10.2.4 Select Access control and in User groups select Contributor from the drop-down list
10.2.5 In Allowed languages for translation select Dutch

10.3 Click Create
Your saved account should look like this:

![Profile page](image)

Users can be assigned different access privileges to create, edit and delete descriptions and taxonomy terms on an individual basis or Users can be affiliated with a Group, such as Contributor, and then they can inherit the privileges of the Group.

There are many ways to refine a user's permissions and demonstrating all of them is beyond the scope of this tutorial. In the View user profile screen, there is a grey menu directly above the user's profile.

10.4 Click on Archival description permissions in this menu. The screen will show the permissions that the user has to create, update and delete Archival descriptions. These can be limited to a specific archival institution.

As the Administrator you can change the permissions to Grant or Deny. The term Inherit means that the User inherits the general permissions associated with their group, in this case Contributor.
Change description template

ICA-AtoM includes different templates for creating and editing resource descriptions: the International Standard for Archival Description (General) (ISAD[G]), Canadian Rules for Archival Description (RAD), Dublin Core and Metadata Object Description Schema (MODS).

10.5 Under Admin Click Settings

10.6 Select Default Template and switch from ISAD(G) to RAD.

10.7 Click Save

Navigate to some of your archival descriptions to view them in RAD. You will see that both the view screen and edit screen will now contain RAD fields and field labels. In many cases red warnings will be visible because required elements for compliance with the RAD standard are missing.

You may wish to change the template back to ISAD(G) for the rest of the workshop.
Add a new static page

Administrators can edit or add new static pages (i.e., html pages) in ICA-AtoM.

10.8 Navigate to Admin and select Static pages from the list.

10.9 Click Add new

10.10 In Title type *Exhibits*

10.11 In Slug type *exhibits* (this creates a permanent link to this static page)

10.12 In Content type *The Port Moody Archives is currently showing early 20th-century panoramic photographs in its public gallery. The exhibit closes September 8, 2011.*

10.13 Click Create

View Result
Administrators can add, edit, delete and move menus in ICA-AtoM. In this exercise, you will create a new menu for exhibits.

10.14 Select Admin and click Menus

10.15 Click Add new at the bottom of the page.

10.16 In the Edit menu add the following data:

- **10.16.1 In Name type** exhibits
- **10.16.2 In Label type** exhibits
- **10.16.3 In Parent select** -mainMenu
- **10.16.4 In Path type** staticpage/index?slug=exhibits

10.17 Click Save

Once the menu is saved you will see a link to it in the main menu bar. This is because you selected “main menu” as the parent menu when you created it. By placing the menu for exhibits in the main menu bar it allows an Administrator easy access to edit the static page when updating information about changing exhibits.
Customize user interface labels

Administrators can change the labels that appear on ICA-AtoM’s view, edit and list screens.

10.18 Navigate to Admin and select Settings.

10.19 Select User interface label and change data:

10.19.1 In repository change Archival institution to *Archival repository*

10.20 Click Save
10.21 Navigate to one of your archival descriptions. You will see that “Archival institution” has been changed to “Archival repository” in the context menu.

10.22 Navigate to the description for the Port Moody Archives. You will see that in the screen title “Archival institution” has been changed to “Archival repository”

10.23 To change the browse menu label from “archival institutions” to “archival repositories” hover your cursor over Admin and select Menus from the drop-down list.

10.24 Select browseRepositories
10.25 In Label change the text to *Archival repositories*

10.26 Click Save

The browse box now lists “archival repositories” instead of institutions.
Translating records

In ICA-AtoM you can create records in English, French, Spanish, Dutch etc... All records and taxonomy terms can be translated into another language.

10.27 Navigate to the homepage and select the desired language in the top left-hand corner of the screen.

10.28 Click on the language of your choice. For this exercise we will select Dutch.

As you can see many of the labels are translated. The work of translation for ICA-AtoM labels and terms is provided by volunteers. This means that as features are added and the program changes, translation needs are ongoing. See below for an example of both the labels and the content in Dutch (note that the ICA-AtoM template has been modified in this example).

Congratulations! You have completed this tutorial. You are finished with the Training Manual. Well done!