

© Artefactual Systems Inc., 2013.  
You are free to copy, redistribute or repurpose this work under the terms  
of the Creative Commons Attribution-ShareAlike 3.0 license.

## Introduction to ICA-AtoM 1.3

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:

- |                                |                                     |
|--------------------------------|-------------------------------------|
| <b>1. User Permissions</b>     | <b>7. Settings</b>                  |
| <b>1.1 Information objects</b> | <b>7.1 Global</b>                   |
| <b>1.2 Actor</b>               | <b>7.2 Default template</b>         |
| <b>1.3 Taxonomy</b>            | <b>7.3 User interface label</b>     |
| <b>2. Add/edit Groups</b>      | <b>7.4 I18n languages</b>           |
|                                | <b>7.5 Security</b>                 |
| <b>3. Static pages</b>         | <b>8. Description updates</b>       |
| <b>4. Menus</b>                | <b>9. Global Search and Replace</b> |
| <b>5. Plugins</b>              |                                     |
| <b>6. Themes</b>               | <b>10. Visible elements</b>         |

## 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 [https://www.ica-atom.org/doc/User\\_manual](https://www.ica-atom.org/doc/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>.

## ASA – Administrators Training Workshop OUTLINE

<b>1. User Permissions</b>	<b>4</b>
1.1 Information objects & Repository	5
1.2 Actor	9
1.3 Taxonomy	11
<b>2. Add/edit Groups</b>	<b>13</b>
<b>3. Static Pages</b>	<b>15</b>
<b>4. Menus</b>	<b>16</b>
<b>5. Plugins</b>	<b>18</b>
<b>6. Themes</b>	<b>20</b>
<b>7. Settings</b>	<b>21</b>
7.1 Global	21
7.2 Default template	23
7.3 User interface label	25
7.4 I18n languages	26
7.5 Security	27
<b>8. Description updates</b>	<b>28</b>
<b>9. Global Search and Replace</b>	<b>29</b>
<b>10. Visible elements</b>	<b>31</b>

## Tutorial 1: User Permissions

In this tutorial you will learn how to manage user accounts, and control permissions associated with those accounts. Every user of the system who needs to be able to add, edit, or delete database content must have a user account. Only administrators can add new user accounts.

### BEFORE YOU BEGIN:

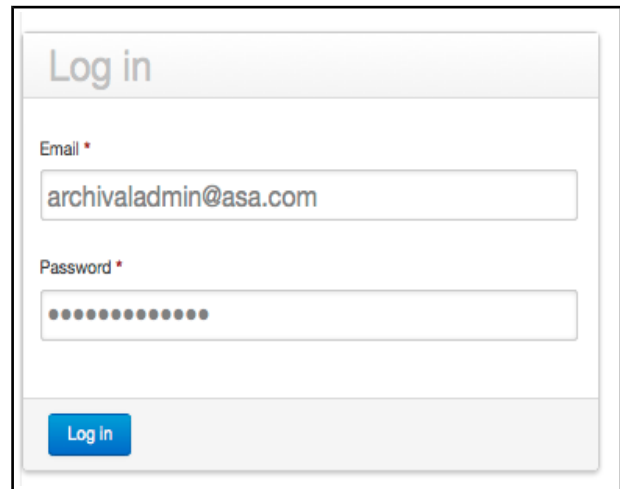
Click the **Log in** link in the user menu (located in the upper right-hand corner of your screen).

In the Log in screen enter the following data:

In **Email** type: *archivaladmin@asa.com*

In **Password** type: *ArchivalAdmin*

Click the blue **Log In** button

A screenshot of a web application's login interface. At the top, there is a header bar with the text "Log in". Below this, there are two input fields. The first is labeled "Email \*" and contains the text "archivaladmin@asa.com". The second is labeled "Password \*" and contains a series of dots, indicating a masked password. Below the password field is a blue button with the text "Log in".

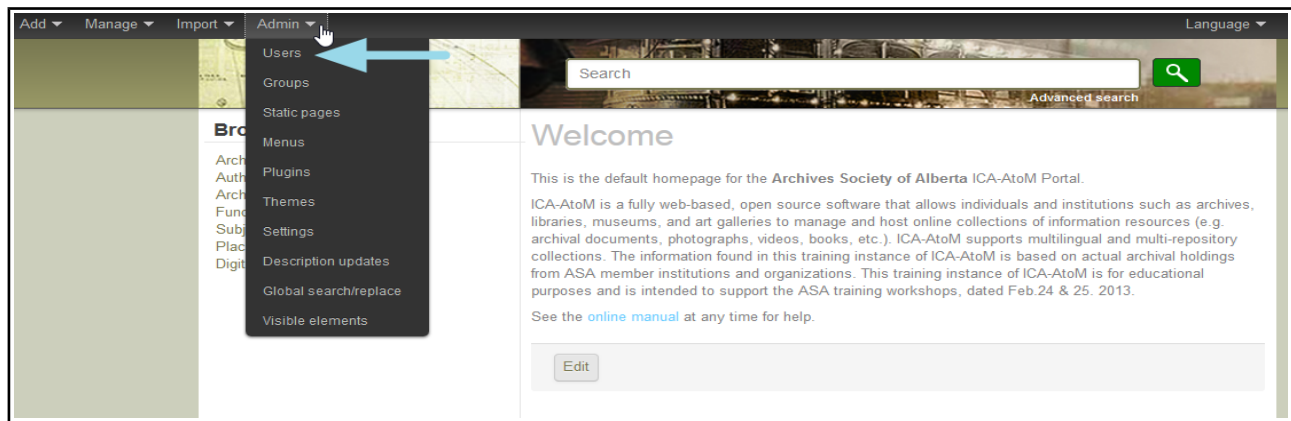
An Administrator can import & export digital objects, archival descriptions, authority records and taxonomies. The Administrator can read, edit, delete and publish all records in the system. The Administrator can control permissions of all users in the system and customize the application.

*In most Institutions there is only one Administrator and the processing archivists are given Editor status, which grants the functionality of an Administrator but restricts the ability to customize the application and control permissions for other users in the system.*

*At any time in the tutorial you can return to the Homepage by clicking on Quick links in the upper right-hand corner of your screen and selecting "Home" from the drop-down.*

## 1.1 Information Objects & Repository

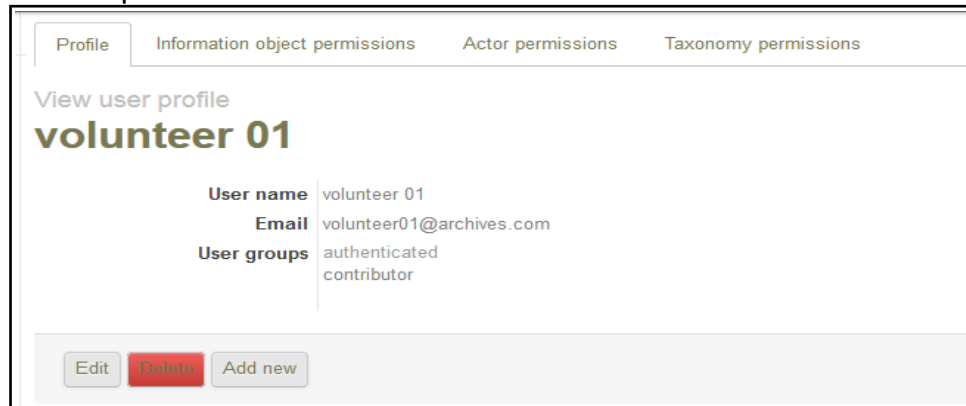
**1.1.1** When you are logged in as an administrator, you will be able to see an additional menu tab at the top of the screen: **Admin**. Click on the Admin menu button, and select “**Users**”



**1.1.2** ICA-AtoM takes you to the **List users** page. To add a new User, Click the **Add new** button at the bottom of the page and enter the following data:

- Under the Select Basic info area, in the data field titled **Username** type “*Volunteer01*”
- In the **Email** type [volunteer01@archives.com](mailto:volunteer01@archives.com)
- In the **Password** type *ABC123*. Retype this information again in **Confirm password**.
- Click the **Access control** area and in the **User group** select *Contributor* from the drop-down list
- In **Allowed languages** select *English*
- Click on the blue **Create** button

### 1.1.3 Your new user profile should now look like this:



Profile Information object permissions Actor permissions Taxonomy permissions

View user profile  
**volunteer 01**

User name volunteer 01  
Email volunteer01@archives.com  
User groups authenticated contributor

Edit Delete Add new

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. In the View user profile screen, there is a set of tabbed menu options for controlling permissions. You can view them by clicking on the titles:**

**1.1.4** Click on **Archival description permissions** title/tab. The screen will show the permissions that the User has to create, update, and view the draft versions of Archival descriptions. A contributor also have permission to access the master of a digital object linked to an archival description.

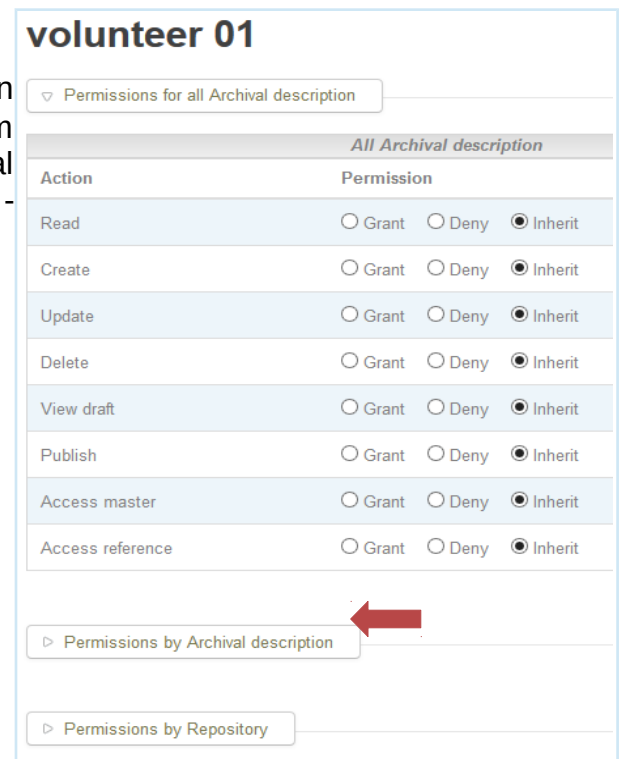
Click on the **Edit** button. As the Administrator, you can change the permissions to Grant or Deny. The term Inherit means that the User inherits the general permissions associated with their group, in this case - Contributor.

**1.1.5** We will now add a specific permission for an archival description. Click the **Permissions by Archival description** tab, and then Click on the **Add archival description** hyperlink.



▽ Permissions by Archival description

Add permissions by Archival description  
Add Archival description



**volunteer 01**

▽ Permissions for all Archival description

Action	Permission
Read	<input type="radio"/> Grant <input type="radio"/> Deny <input checked="" type="radio"/> Inherit
Create	<input type="radio"/> Grant <input type="radio"/> Deny <input checked="" type="radio"/> Inherit
Update	<input type="radio"/> Grant <input type="radio"/> Deny <input checked="" type="radio"/> Inherit
Delete	<input type="radio"/> Grant <input type="radio"/> Deny <input checked="" type="radio"/> Inherit
View draft	<input type="radio"/> Grant <input type="radio"/> Deny <input checked="" type="radio"/> Inherit
Publish	<input type="radio"/> Grant <input type="radio"/> Deny <input checked="" type="radio"/> Inherit
Access master	<input type="radio"/> Grant <input type="radio"/> Deny <input checked="" type="radio"/> Inherit
Access reference	<input type="radio"/> Grant <input type="radio"/> Deny <input checked="" type="radio"/> Inherit

▷ Permissions by Archival description

▷ Permissions by Repository

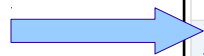
**1.1.6** You will be shown a dialogue that allows you to select from existing archival descriptions in ICA-AtoM. The list will auto-populate with the first 10 results. Type the letter “d” and wait for the field to re-populate. Select:

**Fonds glen-835 – Dibney family fonds**

Click on the blue **Submit** button.

**1.1.7** The Administrator is now given the option to grant or deny specific permissions. If we select “Deny” for all permissions, **Save** our changes, log out and then log in as Volunteer 01, we should not be able to access the Dibney family fonds within ICA-AtoM at all. A quick way to test this is to enter “Dibney” into the general search bar, and then select Dibney family fonds from the results list. ICA-AtoM provides a locked warning: **“Sorry, you do not have permission to access that page.”**

**NOTE:** The terms “Access master” and “Access reference” refer to digital objects associated with the archival description.



Action	Permissions
Read	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Create	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Update	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Delete	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
View draft	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Publish	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Access master	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Access reference	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit

Add permissions by Archival description  
Add Archival description



**1.1.8** Below the **Permissions by Archival description** area is a **Permissions by Repository** area (see red arrow above). The Administrator can limit a User to a specific repository, which is very useful in a multi-institutional portal.

**1.1.9** Click on the **Permissions by Repository** area and then click on **Add Repository**. Begin to type “G” and the auto-complete will suggest Glenbow Archives, Select **Glenbow Archives** and Click on the blue **Submit** button.

ICA-AtoM takes you to a permissions screen for Glenbow Archives and you can “Deny” all permissions. Click on the blue **Save** button.

Permissions by Repository

Glenbow Archives	
Action	Permission
Read	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Create	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Update	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Delete	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
View draft	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Publish	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Access master	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Access reference	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit

Add permissions by Repository  
Add Repository

Cancel Save

**1.1.10** Now log out and log in as Volunteer01 and navigate to the Glenbow Archives via the Browse Archival institutions hyperlink. On the View Repository page for the Glenbow Archives you can see a list of their Holdings on the left-side of the screen in the context menu. Click on any of the Titles (hyperlinks) and ICA-AtoM will respond with a locked warning: ***“Sorry, you do not have permission to access that page.”***

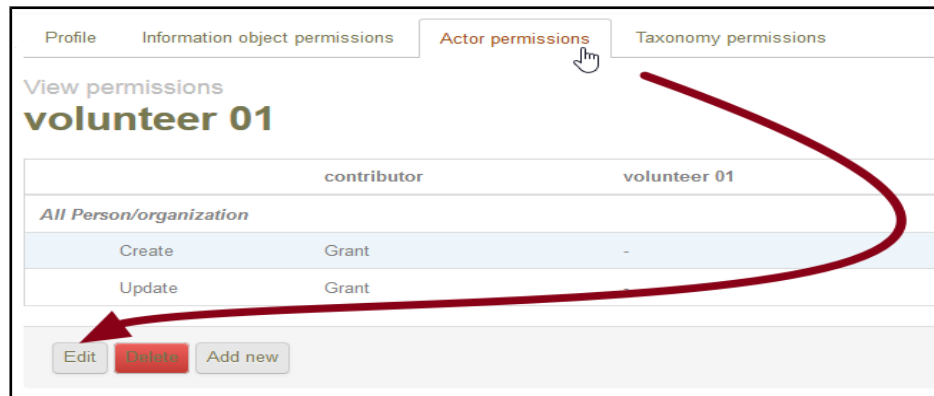
**Log out of the Volunteer01 and log in as an Administrator to proceed with the next exercise on Actor/authority record permissions.**



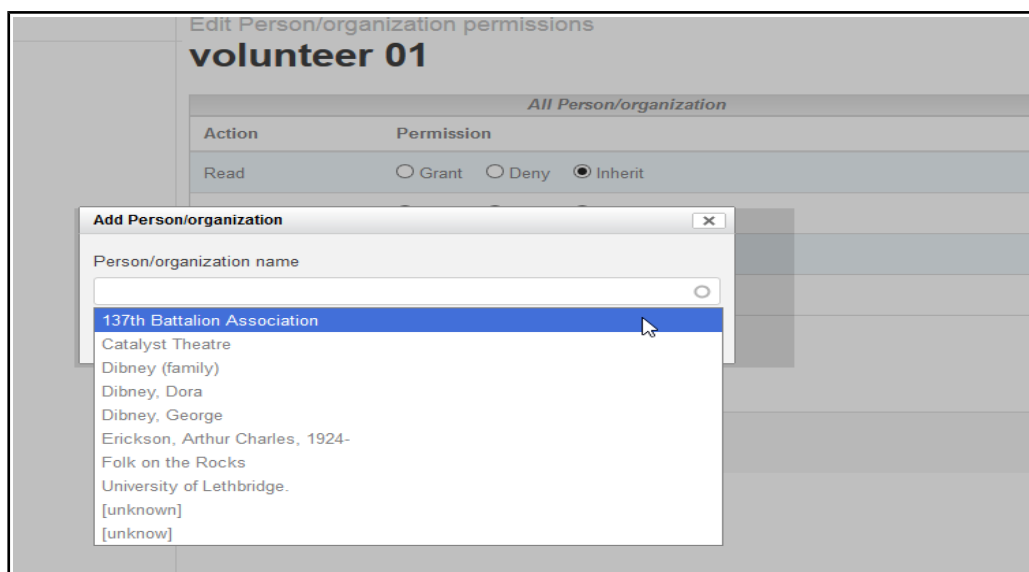
## 1.2 Actor

Specific user permissions can also be set for Authority records in ICA-AtoM. To perform this tutorial, remember to log back into ICA-AtoM as the Administrator.

**1.2.1** In the Admin menu, select **Users** and Click on **Volunteer01**. At the top of the user profile, click on the **Actor permissions** tab, and then click on the **Edit** button.



**1.2.2** You will see a screen similar to the one used for Archival description permissions. The administrator has the choice to Grant or Deny permissions for viewing, creating, updating, or deleting Authority records. At the bottom of the general permissions menu, you will also see an option to Add/edit permissions by person/organization. Click the link, and a dialogue will appear, allowing you to choose an authority record from ICA-AtoM:




**1.2.3** Once you've selected an Authority record, you can set read/create/update/delete permissions for Volunteer 01. Select the **137<sup>th</sup> Battalion Association** authority record.

Deny permissions to Create, Update or Delete the 137<sup>th</sup> Battalion Association authority record (see screen capture below). When you are done, click the **Save** button at the bottom. If you log out and log in as Volunteer01 and navigate to the **Browse Authority records** and select 137<sup>th</sup> Battalion Association from the list, you will be able to Read, but not Edit or Add new. Navigate to a different Authority record and your permissions are no-longer restricted.

137th Battalion Association	
Action	Permissions
Read	<input checked="" type="radio"/> Grant <input type="radio"/> Deny <input type="radio"/> Inherit
Create	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Update	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit
Delete	<input type="radio"/> Grant <input checked="" type="radio"/> Deny <input type="radio"/> Inherit

Add permissions by Person/organization

Add Person/organization 

If you log back in as an Administrator and navigate to the User-Vounteer01, you can continue to restrict permissions for any number of Authority record using this interface (see the red arrow above).

## 1.3 Taxonomy

**1.3.1** User permissions for taxonomies can also be set in ICA-AtoM. Select the **Taxonomy permissions** tab above the user profile that you would like to edit. The interface is similar to permissions management for Archival descriptions and Authority records. This exercise requires you to **change the Volunteer01's User group from Contributor to Editor**. Groups be explained in the next tutorial section, but for now you need to understand that placing a User in a Group controls their default permissions. The Contributor Group does not have access to altering Taxonomies, but the Editor Group does. Click on the **Edit** button and **Delete the Contributor affiliation by clicking on the "x"** and then **Add the Editor group affiliation**. Click on the **Save** button.

The screenshot shows the 'Taxonomy permissions' tab for the user 'Volunteer01'. The page has a header with four tabs: 'Profile', 'Archival description permissions', 'Actor permissions', and 'Taxonomy permissions'. Below the tabs, the text 'View user profile' is followed by the user's name 'Volunteer01' in a large, bold font. A table-like structure displays the following information:

User name	Volunteer01
Email	volunteer01@archives.com
User groups	authenticated editor
Repository affiliation	Glenbow Archives

At the bottom of the page, there are three buttons: 'Edit' (highlighted in red), 'Delete', and 'Add new'.

### FIRST: A Word About Taxonomies in ICA-AtoM

As defined in our documentation glossary, a taxonomy in AtoM is “a *grouping of controlled-vocabulary terms used to generate value lists and access points.*” Throughout ICA-AtoM, controlled vocabularies are used to generate drop-down menus. These provide value lists that restrict data entry in certain fields to certain values. A value list is defined in our glossary as restricting “*data entry in certain fields to controlled vocabulary terms or terms derived from authority records. They appear as drop-down menus in edit pages.*” ICA-AtoM typically stores these values as term records in the database, and assigns them to taxonomies, e.g. the type of entity field of an authority record can take only one of "corporate body, person, family." Each of these values is a term assigned to the actor entity types taxonomy. All controlled

vocabularies are managed via taxonomies in AtoM, accessible to authorized users via the **Manage > Taxonomies** menu

ICA-AtoM ships with a fixed number of taxonomies containing default values (terms). Some terms are locked, i.e. cannot be edited or deleted, because they are used by the application's underlying code. Most terms, however, can be edited or deleted, and all taxonomies can be assigned new terms in addition to any locked values.

### An Example of a locked taxonomy: Material Type

Material type is a controlled vocabulary that supports our Canadian **Rules for Archival Description (RAD)** template. A complete version of RAD is available from the Canadian Council on Archives here: <http://www.cdncouncilarchives.ca/archdesrules.html>

By allowing authorized administrators access to all taxonomies, users have the ability to customize descriptive templates to meet local or regional descriptive practices, or to remove controlled field terms that are not in use within the institution. This ability to customize is one of the strengths of AtoM as a freely available open-source software application.

Administrators cannot create new taxonomies, the number and names of the taxonomies in ICA-AtoM are fixed and can only be altered by developers working directly with the code.

**1.3.2** After selecting the **Taxonomy permissions** tab, Click on the **Edit** button. You will see that ICA-AtoM presents you with the option of restricting **Permissions for all Terms**, or **Permissions by taxonomy**. Click on the **Add taxonomy** hyperlink and a pop-up data entry field appears, begin typing “P” and ICA-AtoM suggests **Places**, Select **Places** and Click on the blue **Submit** button. You are presented with the option of Grant or Deny for the actions of Create, Update and Delete. Click on “*Deny*” for the ability to **Delete** and Click on the blue **Save** button.

**1.3.3** Log out and then Log in as Volunteer01. Navigate to the **Manage** menu in the left-hand corner of the screen and select **Taxonomies** from the drop-down list. In the List of taxonomies go through the page until you locate **Places** and Click on the hyperlink. The **List Places** page presents you with the term *Canada*. Select **Canada** and notice on the **View term** page that you do not have the option of a **Delete** button.

## Tutorial 2: Groups

In this tutorial you will learn how to manage Groups in ICA-AtoM. Groups are a powerful method of creating default permission settings that can be applied quickly to new Users.

**2.1 Go to the Admin menu and Select Groups from the drop-down list.** You will be presented with a **List groups** screen, which provides you with an overview of all the **Groups** in the system and the # of **Members** belonging to each group. Each Group represents a different level of access to the system, the Administrator can add and modify Groups.

**Researcher** - A researcher is any user who is not logged in and therefore has view-only access to the application. A researcher can search and browse authority records, archival repositories and published archival descriptions.

**Contributor** - By default a contributor can search, browse, create, edit/update, view draft and export descriptions. The contributor cannot change the publication status of an information object. A contributor can access the reference and master digital object.

**Editor** - By default an editor can search, browse, create, edit/update, view draft, delete and export descriptions and edit taxonomies. An editor can also change the publication status of an information object. An editor can access the reference and the master digital object.

**Administrator** - An administrator can import, export, create, read, update, publish and delete any record in the system, can customize application to institution specific requirements, and can manage User accounts and profiles.

**Translator** - A translator can search and browse published descriptions and can translate the User interface elements and database content.

**2.2** To add a new Group, click on the **Add new** button.

Enter the following data:

In **Name** type –  
*University Student Group*

In **Description** type –  
*This is a temporary Group that is visiting the Archives Reading Room to review Folk on the Rocks materials.*

Click the **Create** button.

**Add new group**

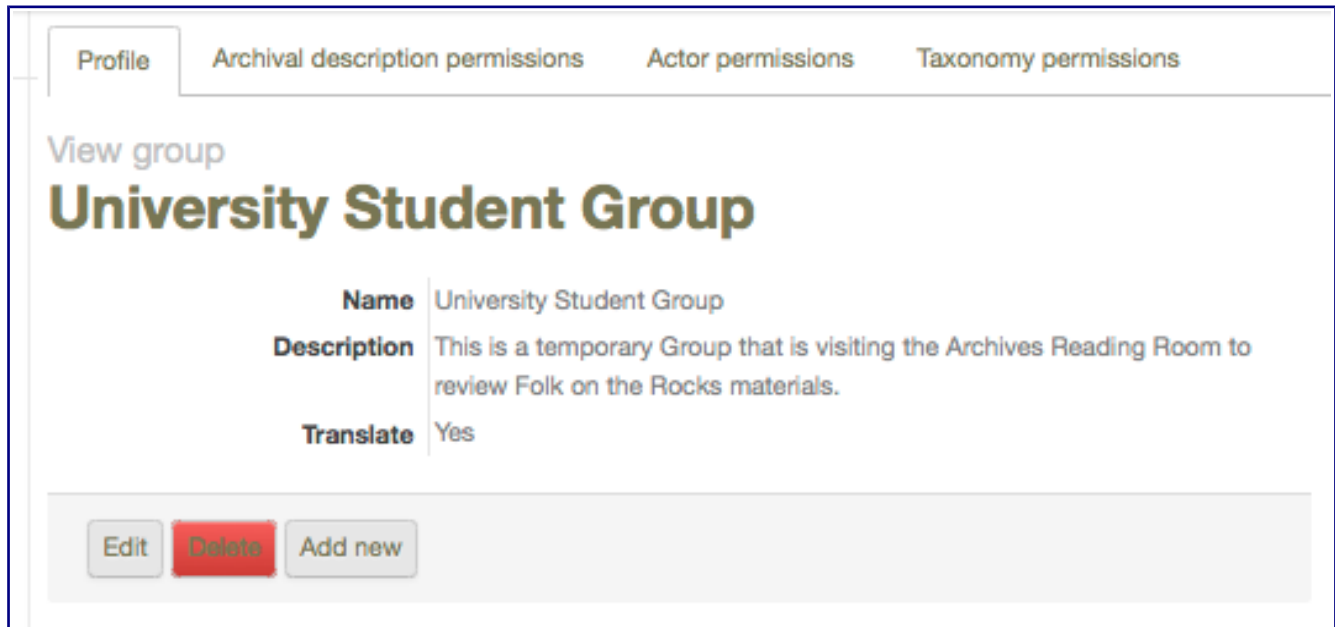
Name  
University Student Group

Description  
This is a temporary Group that is visiting the Archives Reading Room to review Folk on the Rocks materials.

Translate  
☒ Yes  
☐ No

Cancel Create

**2.3** ICA-AtoM takes you to the **View Group** page for the **University Student Group**. By default they are Authenticated, but now you must Grant or Deny all the permissions (Archival descriptions & Archival repository, Authority Records and Taxonomies), just as you did earlier per individual User. The difference being, that you will be creating a Group that you will enter all the Students into as Members. This means you can create a special Group, add users and then delete the group when the project is finished. The combination of Groups and Users permissions is a very powerful tool for Administrators.



The screenshot shows the 'View group' page for the 'University Student Group'. At the top, there are four tabs: 'Profile' (selected), 'Archival description permissions', 'Actor permissions', and 'Taxonomy permissions'. Below the tabs, the page title is 'View group' followed by 'University Student Group' in a large, bold font. A table displays the group's details:

<b>Name</b>	University Student Group
<b>Description</b>	This is a temporary Group that is visiting the Archives Reading Room to review Folk on the Rocks materials.
<b>Translate</b>	Yes

At the bottom of the page, there are three buttons: 'Edit' (disabled), 'Delete' (highlighted in red), and 'Add new' (disabled).

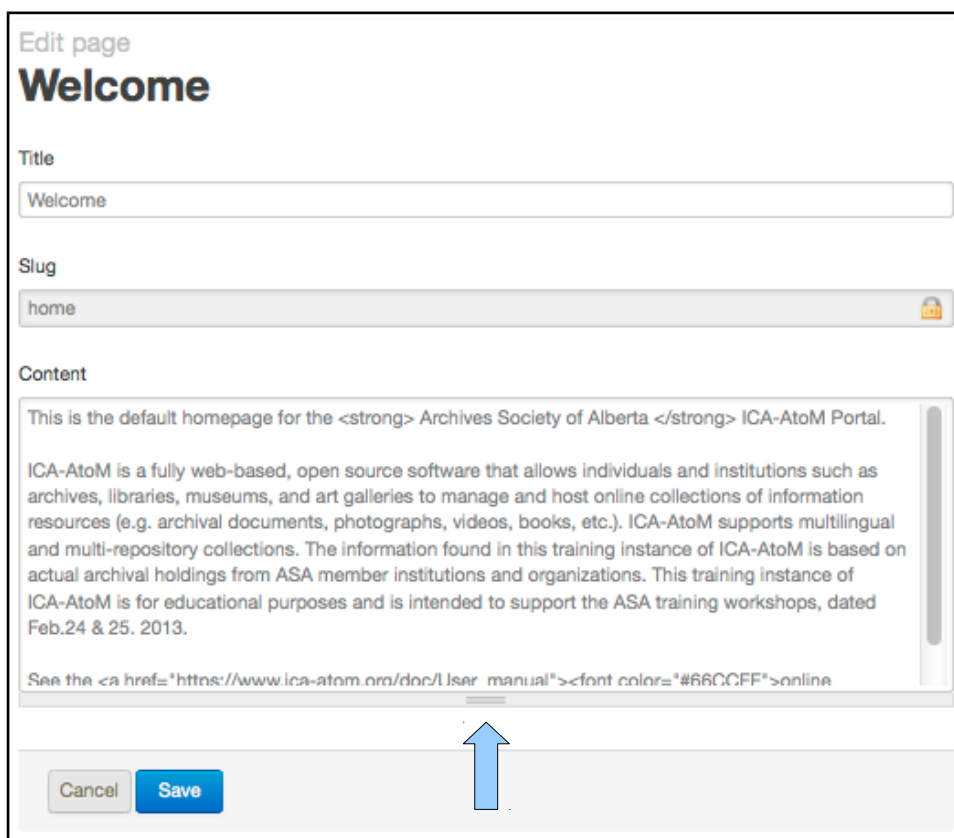
**2.4** As the Administrator of the database, you can also change the default settings for the Groups and fine-tune them to suit your organizational structure. Simply Click on any of the existing default Groups and Edit their permissions. Whatever changes you make will affect every member that belongs to that Group.

## Tutorial 3: Static pages

In this tutorial you will learn how to manage static pages: **Welcome** and **About**. ICA-AtoM 1.3 ships with a default welcome message on the Home page and on the About page. Both Administrators and Editors have the permission to edit static pages.

**3.1** Go to the Admin menu and Select Static pages from the drop-down list.

**3.2** On the **List pages** screen Click on the **Welcome** hyperlink. Click on **Edit**. You can begin to edit the Welcome page text. Use the scroll function or the spanner bar to increase the size of your data entry window. (See blue arrows below). After you have made changes, Click the blue **Save** button. If you want to create formatting, use HTML code.



Edit page

### Welcome

Title

Welcome

Slug

home

Content

This is the default homepage for the <strong> Archives Society of Alberta </strong> ICA-AtoM Portal.

ICA-AtoM is a fully web-based, open source software that allows individuals and institutions such as archives, libraries, museums, and art galleries to manage and host online collections of information resources (e.g. archival documents, photographs, videos, books, etc.). ICA-AtoM supports multilingual and multi-repository collections. The information found in this training instance of ICA-AtoM is based on actual archival holdings from ASA member institutions and organizations. This training instance of ICA-AtoM is for educational purposes and is intended to support the ASA training workshops, dated Feb.24 & 25, 2013.

See the <a href="https://www.ica-atom.org/doc/User\_manual"><font color="#66CCFF">online

Cancel Save

**3.3** Perform the same actions for the **About** page, edit the text and **Save**.

## Tutorial 4: Menus

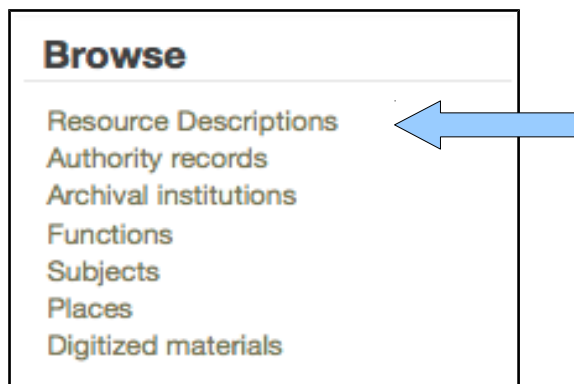
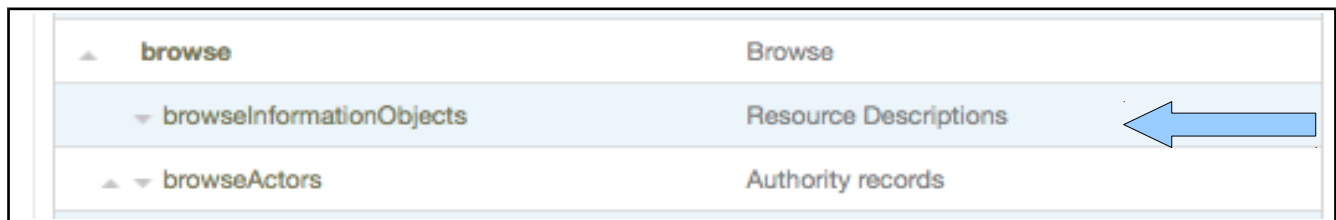
In this tutorial you will learn how to manage Menus in ICA-AtoM. Menu customization is available to Administrators to assist them in creating, editing and deleting existing navigation menus. Some menus have a lock icon next to them, which means they cannot be deleted, but they can still be edited.

**4.1** Go to the Admin menu and Select Menus from the drop-down list.

**4.2** In the **Site menu list**, you will see 2 columns: **Name** and **Label**. All the Menu Names are **hyperlinks**. The Menu Names are grouped according to Main menu (everything that appears in the Menu in the top-left corner of the homepage, including drop-down list), Quick links (everything that appears in the Menu in the top-right corner of the homepage, including drop-down lists) and the Browse menu, which is located in the context menu on the left-side of ICA-AtoM pages.

**4.3** Click on **browseInformationObjects** hyperlink and in the Edit menu page change the Label from Archival descriptions to *"Resource Descriptions"*.

**4.4** Click on the blue **Save** button. ICA-AtoM has changed the Label in the list and in the User Interface.



**4.5** To delete a menu that is not used in a multi-institutional portal, for example Accessions. You simply locate the 2 Menus: addAccessionRecord and accessions and delete them. Once deleted, they do not appear in the User Interface.

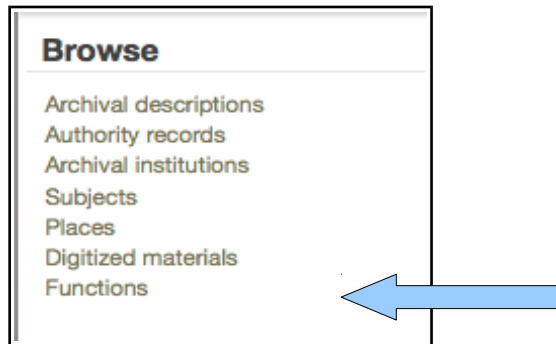


**4.6** Notice the grey arrows facing up and down next to many of the Menu Names? If you click on these arrows the Menu Names move up or down and the User Interface responds.

For example, **Hover your cursor over the grey arrow facing down next to browseFunctions.**

When you see a hand, **Click on the arrow**, repeat this action until the Menu Name is below browseDigitalObjects.

Navigate to the top-left corner of the page and look at the **Browse menu and your move.**



## Tutorial 5: Plugins

In this tutorial you will learn how to manage Plugins. In general, the Administrator wants the majority of Plugins to be enabled so that their inherent functionality is provided through the User Interface. Administrators can only enable or disable a Plugin.

### 5.1 Go to the Admin menu and select Plugins from the drop-down list.

**5.2** ICA-AtoM takes you to the List plugins page. The default is to have all plugins enabled except for qtSwordPlugin and qtOAIPugin. The qtSwordPlugin is used when uploading DIPs (Dissemination Information Packages) to ICA-AtoM from Archivematica (digital preservation software) and qtOAIPugin has been temporarily disabled because it was not working properly.

All the Plugins below should be enabled, unless the Administrator wants to restrict Users from entering data using that content standard/ template.

sfModsPlugin

Metadata standard plugin. Enables data-entry, display, and XML export using Metadata Object Description Schema (MODS).

sfEadPlugin

Metadata standard plugin. Enables XML import and export using Encoded Archival Description (EAD).

sfSkosPlugin

Data transform plugin. Enables XML import and export of Simple Knowledge Organization System (SKOS) data.

sfDcPlugin

Metadata standard plugin. Enables data-entry, display, XML import, XML export, and OAI harvesting using (simple) Dublin Core (DC) elements.

sfIsdfPlugin

Metadata standard plugin. Enables data-entry and display using International Standard for Describing Functions (ISDF).

sfIsadPlugin

Metadata standard plugin. Enables data-entry and display using International Standard Archival Description (ISAD).

sfEacPlugin

Metadata standard plugin. Enables XML import and export using Encoded Archival Description (EAD).

sfIsaarPlugin

Metadata standard plugin. Enables data-entry and display using International Standard Archival Authority Record for Corporate Bodies, Persons and Families (ISAAR (CPF)).

sfRadPlugin

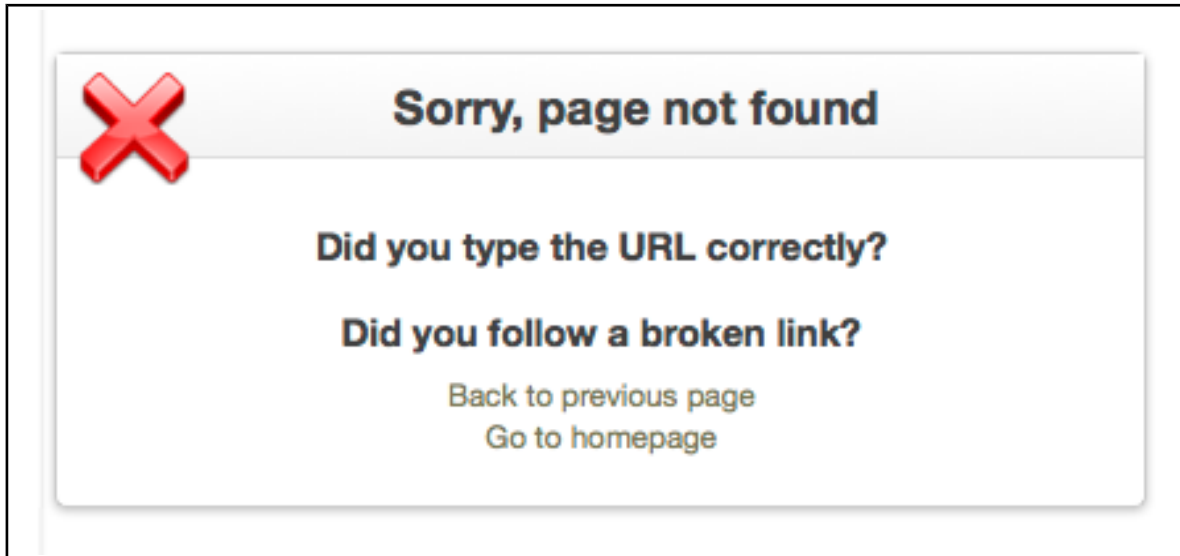
Metadata standard plugin. Enables data-entry and display using Rules for Archival Description (RAD).

sfIsdiahPlugin

Metadata standard plugin. Enables data-entry and display using International Standard for Describing Institutions with Archival Holdings (ISDIAH).

**5.3 Disable** the **sfRadPlugin** by unclicking the checkmark in the box on the right. Click on the blue **Save** button.

**5.4** Go to the **Add menu** and select **Archival descriptions** from the drop-down list.



**5.5** Go back and **enable** the **sfRadPlugin**. Click on the blue **Save** button.

**5.6** Go to the **Add menu** and select **Archival descriptions** from the drop-down. ICA-AtoM takes you to an Edit archival description page.

**The reason for this error response is that the default archival description template for the ASA site is set for RAD. If the sfRadPlugin is disabled, there is no template for entering archival descriptions. The same is true for all other content standard Plugins and for content exchange Plugins.**

## Tutorial 6: Themes

In this tutorial you will learn how to select different themes to change the look of ICA-AtoM.

**6.1 Go to the Admin menu and Select Themes from the drop-down list.**

**6.2 ICA-AtoM takes you to the List themes page. The default for ICA-AtoM 1.3 is the Trillium theme. There are three columns, Name, Version and Enabled status.**

**To enable a different theme you simply click on the box next to it. Select one, then Click on the Save button and the User interface will change.**

Name	Version	Enabled
<b>sfColumbiaPlugin</b> Theme plugin. Adaptation of fixed width Classic theme using shades of blue and drop-down menus. Includes a header image from Columbia Street, New Westminster (1907).	1.0.0	<input checked="" type="checkbox"/>
<b>qtTrilliumPlugin</b> Theme plugin made from scratch with some JavaScript magic. Cross-browser compatibility tested. Based in Twitter Bootstrap 1.4, 940px two-column layout, slightly responsive.	1.0.0	<input type="checkbox"/>
<b>sfAlouettePlugin</b> Theme plugin. A green version of the Columbia theme, without the header image.	1.0.0	<input type="checkbox"/>
<b>sfCaribouPlugin</b> Theme plugin. Adaptation of Classic theme that uses drop-down menus and mixes fixed and fluid width elements.	1.0.0	<input type="checkbox"/>

Save

In some of the themes certain features are displayed better (CSS) and drop-downs and pop-up dialogues behave differently. It is best to use the recommended theme for your version of ICA-AtoM.

## Tutorial 7: Site Settings

In this tutorial you will learn about managing the Site Settings. This tutorial is broken into sections: **Global**; **Default template**; **User interface labels**; **118n languages**; and **Security**. [Site information and Default page elements have been overwritten by the ASA customization. Job scheduling is a feature that requires access to the application code; however, in AtoM 2.0 an interface will be provided. OAI Repository is temporarily inoperable.]

### 7.1 GLOBAL

**7.1.1 Go to the Admin menu and Select Themes from the drop-down list. From the Site settings page, Click on the Global hyperlink to open that area.**

**7.1.2** If an Administrator changes something in the Global template, the changes are seen throughout the database – mostly in the way that data is entered or shown during archival processing. In many cases, the default settings have been selected to provide Users with the most support and the best interface.

- **Application version** let's you know what version of ICA-AtoM you are running
- **Automatic notification** lets you know if a new version of the software has been released.
- **Maximum image width (pixels)** - The default display size of uploaded digital objects
- **Results per page** - The number of search results that will be displayed on results pages (E.g., search results, browse lists)
- **Default format for accession record ID** [ YEAR MONTH DAY Incremental#]
- **Default accession counter**
- **Reference code separator** – this can be changed to “/” or “\_” etc..
- **Inherit reference code** - Whether or not the reference code of an archival description is inherited by lower levels attached to that description
- **Sort treeview** - The ability to sort archival descriptions manually, by title, or by identifier -title in the context menu/ treeview. Selecting "manual" means the descriptions will appear in the order in which they were entered into ICA-AtoM. Selecting "title" sorts the descriptions by title. Selecting "identifier - title" sorts the descriptions by identifier, then by title.
- **Sort browser (users)** – Option to set default sort order of browse lists to alphabetic or last updated for logged-in users
- **Sort browser (anonymous)** – Option to set default sort order of browser lists to alphabetic or last updated for online users
- **Multiple repositories** – If multiple repositories are using ICA-AtoM this setting provides a filter in the advanced search to allow for limiting searches to a specific repository
- **Default upload limit [GB]** – This can be changed by the Administrator
- **Multi-page files** - Whether or not uploading multi-page digital objects (e.g., pdfs) results in an archival description being generated for each page
- **The ability to turn tooltips on or off**
- **Default publication status** - Whether new archival descriptions are saved as draft or published by default. Many Administrators prefer to have new descriptions as draft so that they can review the work and approve it before posting it to the public.

**7.1.3** In “Show tooltips” click “NO” and then **click** on the blue **Save** button.

A screenshot of a settings panel in the AtoM interface. The panel has a title bar at the top. Below the title bar, the text "Show tooltips" is followed by two radio button options: "yes" and "no". The "no" option is selected, indicated by a filled circle next to it. The panel has a light gray border and a vertical scrollbar on the right side.

**7.1.4** Navigate to the **Add menu** and **Select Archival descriptions** from the drop-down list. **Open any area and begin to type in a data entry field.** You will notice the **RAD tooltips do not appear to help you along.** This is because you turned off the tooltips in the **Global Settings**.

**7.1.5** Have fun turning other Global settings on and off, and see the changes in the User interface.

## 7.2 Default template

### 7.2.1 Click on the Default template hyperlink to open area.

**7.2.2** The default templates in ICA-AtoM for viewing and editing archival descriptions, authority records and archival repositories are based on International and National standards.

An Administrator can select the template for archival descriptions from a number of standards. For the Canadian context, the RAD standard would be selected. The default for the ASA portal is RAD.

The screenshot shows the 'Site settings' page in ICA-AtoM. The 'Default template' section is expanded, showing a table with columns 'Name' and 'Value'. The 'Archival description' row has a dropdown menu open, displaying a list of standards. The 'RAD, July 2008 version. Canadian Council of Archives' option is highlighted in green. Other options include 'ISAD(G), 2nd ed. International Council on Archives', 'Dublin Core, Version 1.1. Dublin Core Metadata Initiative', 'MODS, Version 3.3. U.S. Library of Congress', and 'ISDIAH, 1st ed. International Council on Archives'. A blue 'Save' button is visible at the bottom right of the settings area.

Name	Value
Archival description	RAD, July 2008 version. Canadian Council of Archives
Person/organization	ISAD(G), 2nd ed. International Council on Archives Dublin Core, Version 1.1. Dublin Core Metadata Initiative MODS, Version 3.3. U.S. Library of Congress RAD, July 2008 version. Canadian Council of Archives ISDIAH, 1st ed. International Council on Archives
Repository	ISDIAH, 1st ed. International Council on Archives

**7.2.3** To see the difference in templates, **Select Dublin Core** from the drop-down list and then **Click** on the blue **Save** button.

**7.2.4** In the **general search bar** type *“Arthur Erickson”* and hit return. Select the **Arthur Erickson fonds** from the **search results** by **clicking on the title hyperlink**. The View archival description page is now called a **View resource metadata page** and the descriptive information conforms to the **Dublin Core standard** (simple).

See next page...

View resource metadata

## caa-3462 - Arthur Erickson fonds

<b>Identifier</b>	caa-3462
<b>Title</b>	Arthur Erickson fonds
<b>Creator</b>	Erickson, Arthur Charles, 1924- (1924-2009)
<b>Date(s)</b>	1963-1970 (Creation)
<b>Subject</b>	Arts
<b>Description</b>	Fonds consists of drawings, specifications, correspondence, and office files from the architectural practice of Arthur Erickson, 1963-1970. Significant projects include: Grauer Garden Terrace & Cabana, Vancouver, BC; Simon Fraser University Master ... »
<b>Format</b>	ca. 25,000 drawings. - ca. 300 display materials. - ca. 36 m of textual records
<b>Relation (isLocatedAt)</b>	Canadian Architectural Archives
<b>Rights</b>	There are no restrictions on access.

**7.2.5** Navigate to the **Add menu** and select **Archival descriptions** from the drop-down list. The Edit archival description page is now called **Edit resource metadata – Dublin Core**.

Edit resource metadata - Dublin Core

## Untitled

Identifier \*

Title \*

Names and dates

Name	Role/event	Date(s)
Add new		

Subject

Description



## 7.3 USER INTERFACE LABELS

---

### 7.3.1 Click on the User Interface Label hyperlink to open area.

The Name column corresponds to the generic entity name that exists in the underlying application running ICA-AtoM. The Value column shows the ICA-AtoM default user interface labels. Changing the user interface labels will not automatically change the corresponding labels in the navigation menus – these must be changed in Admin – Menus.

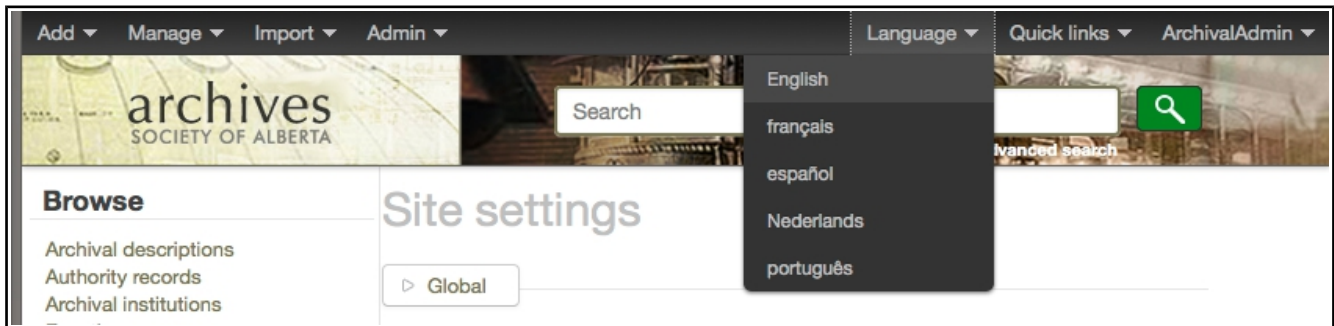
- Informationobject: [Archival description](#)
- actor: [Authority record](#)
- creator: [Creator](#)
- repository: [Archival institution](#)
- function: [Function](#)
- term: [Term](#)
- subject: [Subject](#)
- collection: [Fonds](#)
- holdings: [Holdings](#)
- place: [Place](#)
- name: [Name](#)
- digitalobject: [Digital object](#)
- physicalobject: [Physical storage](#)
- mediatype: [Media type](#)
- materialtype: [General material designation](#)

**7.3.2** To change user interface labels, **enter the new label into the field in the Value column.** Then click on the **Save** button.

## 7.4 I18n LANGUAGES

### 7.4.1 Click on the I18n Languages hyperlink to open area.

The language menu shows you the languages that are currently available in your ICA-AtoM version. The current language does not have an “x” next to it. The four additional languages to English are present here and in the Language menu at the top-right corner of the screen.



**7.4.2** To add a language, select one from the drop-down menu. The drop-down menu shows all available languages for ICA-AtoM. Once selected, the language will appear in the Language menu.

For example,  
we added Slovenian.

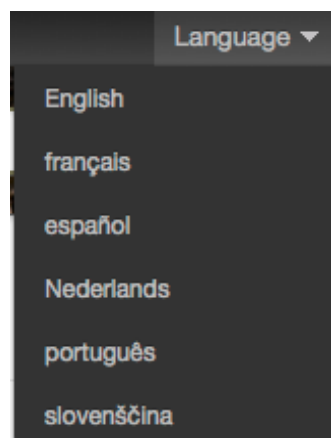
I18n languages

Name	Value	
en	English	
fr	French	×
es	Spanish	×
nl	Dutch	×
pt	Portuguese	×
sl	Slovenian	×

Language code

Add

After refreshing the browser,  
Slovenian has been added to  
the Language menu.



## 7.5 SECURITY PANEL

### 7.5.1 Click on the Security Panel hyperlink to open area.

Introduced in ICA-AtoM 1.3, the new Security features allow the Administrator to increase security by:

Limiting incoming requests for all Administrator functionality to an IP address or an IP range.  
For example:

- 192.168.0.1
- 192.168.0.1-192.168.0.255

Requiring SSL for Administrators.

Requiring stronger passwords by enhancing the login validation to at least 8 characters long, and containing characters from 3 of the following classes:

1. Upper case letters
2. Lower case letters
3. Numbers
4. Special characters

**7.5.2** You can test the new security features by Clicking “*YES*” for Require strong passwords.

**7.5.3** Navigate to the Admin menu and Select Users from the drop-down list. Add new User with the following data:

In **Username** type – *Student*

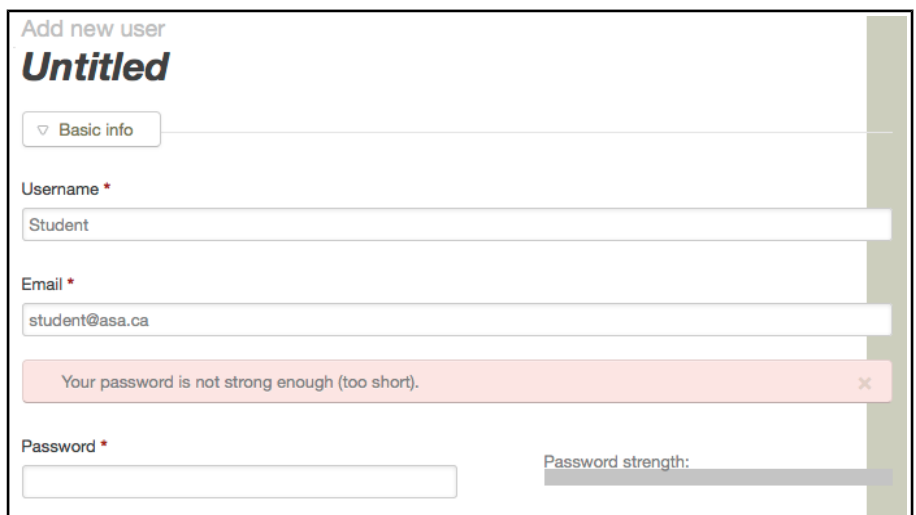
In **Email** type – *student@asa.ca*

In **Password** type – *student*

In **Confirm password** type – *student*

Open **Access control** and join the **University Student Group** you created earlier.

Click on the blue **Create** button.



Add new user

**Untitled**

Basic info

Username \*

Student

Email \*

student@asa.ca

Your password is not strong enough (too short).

Password \*

Password strength:

**ICA-AtoM presents a warning related to the new security settings.**

## Tutorial 8: DESCRIPTION UPDATES

In this tutorial you will learn about managing updates made to the database. The Description updates area of the Admin menu allows the Administrator to track new and updated resources, including: Archival descriptions, Authority records, Repositories, Terms and Functions.

**8.1 Go to Admin menu and Select Description updates from the drop-down list.**

**8.2** The Description updates page is divided into two sections, the top area allows the Administrator to select what type of resource they want to track, a Date range for the period of activity, and if the activity was Creation or Revision or Both. In the case of Archival descriptions, the Administrator has one final filter to use when searching, which is Publication status.

**8.3** To test how it works. **Navigate to the Canadian Architectural Archives** (Repository record) and **Edit the date in the Holdings section from 1974 to 1975. Click** on the **Save** button. **Now navigate back to the Description updates page.**

**8.4 Select Repository** from the **Type** drop-down list and **Click on Revision. Click** the blue **Search** button.

### Description updates

Type

Repository

Date range

2013-01-21

 to 

2013-02-21

Date of

☐ Creation
 ☒ Revision
 ☐ Both

Publication status (Archival description only)

☐ Published
 ☐ Draft
 ☒ All

Search

Name	Updated
Canadian Architectural Archives	2013-02-21 00:30:44

The Canadian Architectural Archives should be at the top of the list. You can easily click on the Name of the resource (e.g., Canadian Architectural Archives) to check the changes that were made. This is the procedure many Administrators use for checking Archival descriptions created or updated by archivists and interns before approving them for publication status and online viewing.

## Tutorial 9: Global Search and Replace

In this tutorial you will learn about Global Search and Replace, a powerful Administrative tool for making content changes to multiple records held in the database. Global Search and Replace should not be used carelessly.

### 9.1 Go to Admin menu and Select Global Search and Replace from the drop-down list.

**9.2** The SEARCH interface for Global Search and Replace is similar to the Advanced search screen. You simply enter search term(s) and select from the drop-down list of search fields: title, admin/bio history, archival history, etc. or choose "Any field" and use keywords or a phrase. Your search is configured using Boolean "AND, OR, and NOT". You can always add another query term by clicking on the "Add new" hyperlink. The Filter options provide different criteria for narrowing your search: by Repository, General material designation, Media type, Digital object availability, Level of description and Copyright status. The REPLACE interface allows you to make changes a specify which of 21 fields you want the change made. Additionally you can make changes that are case sensitive and include syntax expressions (e.g., ? / \$).

**9.3** Every Administrator will use this feature for different end results; however, as part of this exercise it is important to practice working with the tool in a logical manner. Here is the scenario: A summer intern from the School of Library, Archival and Information Studies at Washington State University has completed a number of archival descriptions for the University of Alberta Archives. Unfortunately, as an American, the student used "color" instead of the Canadian spelling "colour". As the Administrator you need to fix the error, but the only information you have is that she was working on a photo digitization project at the University of Alberta Archives. You don't want to change any other records.

**9.3.1** In the **Global Search and Replace** screen enter "color" into the first search box. Click on the blue **Search** box to run the query.

Query results in 20 records.



**9.3.2** After running the Search, ICA-AtoM provides a new interface to Replace the term with another term. However, in our scenario, we need to filter our search results further. We know the student was working with photo digitization, so we can **filter by digital object available**. Click the blue **Search** button to run the query with the addition of digital object filter.

Query results in 18 records.

**9.3.3** At the top of our Search results we can see that a document in the holdings of the Glenbow Archives has been included. We need to **filter by Repository – University of Alberta Archives**. Click the blue **Search** button to run the query with the addition of Repository filter.

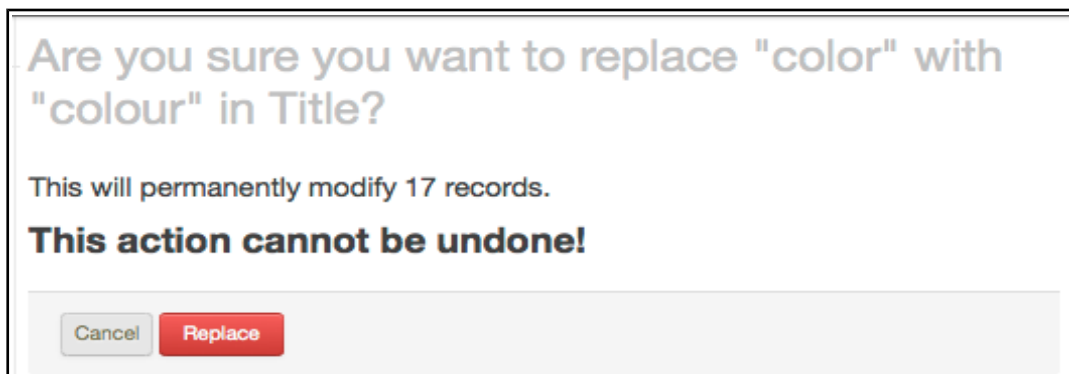
Query results in 17 records.

**9.3.4** A quick scan of the new list of results reveals that they are all records in the holdings of the UAA and they are all photographs with attached digital objects. If you select one of them to view, the physical condition field reveals the term “color”. Click the back button on your browser to return to the Global Search and Replace screen.

**9.3.5** Enter into the **Replace text box** “color”. Enter into the **With text box** “colour”. Select from the **In drop-down list** “physical characteristics” Click on the red **Replace** button.



ICA-AtoM Warns the Administrator about the action about to be conducted. Click **Replace**.

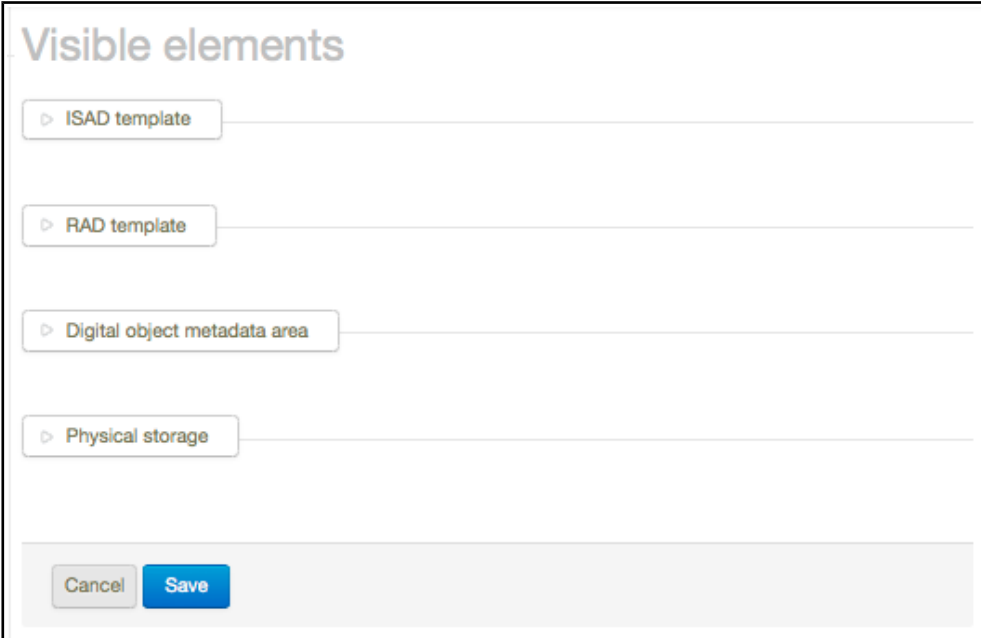


Once completed, you can check the files to confirm that the change has been made.

## Tutorial 10: VISIBLE ELEMENTS

In this tutorial you will learn about a new feature in ICA-AtoM 1.3, which is the ability to hide certain fields from Public viewers (e.g., Not logged-in Users). This feature came in response to Community feedback from archivists and Administrators that wanted to hide information from the Public, in some cases as a security feature – physical storage, and in other cases to make the description easier to understand to non-archivists.


**10.1 Go to Admin menu and Select Visible elements from the drop-down list. The page is divided into areas that are hyperlinks.**

The screenshot shows a web interface titled "Visible elements". It contains four expandable sections, each with a right-pointing triangle icon and a label: "ISAD template", "RAD template", "Digital object metadata area", and "Physical storage". At the bottom of the interface are two buttons: "Cancel" and "Save".

**10.2** For our purposes, we will review the RAD template; Digital object metadata area; and Physical storage. **Click on the RAD hyperlink** to open the area. The default is to have all fields visible.

13 fields from the RAD template are available for hiding. **Click on the checkmark next to Conservation note(s).** This action will hide any conservation notes from a Public User. Click on the blue **Save** button.

**10.3** Navigate to the Dibney family fonds archival description. Scan the description and locate the Conservation notes.

Notes area 	
<b>Immediate source of acquisition</b>	Gift of Dora Dibney, 1961, 1969.
<b>Restrictions on access</b>	Some restrictions apply. See item-level descriptions.
<b>Finding aids</b>	No finding aid.
<b>Associated / related material</b>	Other Dibney records are held by the Provincial Archives of Manitoba and Library and Archives Canada.
<b>Other notes</b>	General note: Record No. M-321;M-322;PA-403  Conservation: The diary was acquired from the Donor in poor condition. A number of treatments have been conducted to stabilize the levels of acidity in the paper; support the weakened state of the cover materials; remove sticky tape that was inserted into the binding to hold together loose pages; and removal of an unknown substance on the last page (possibly gum).

**10.4** Log out and navigate to the Dibney family fonds archival description. Scan the description and notice that the conservation notes are now hidden from Public view.

Notes area	
<b>Immediate source of acquisition</b>	Gift of Dora Dibney, 1961, 1969.
<b>Restrictions on access</b>	Some restrictions apply. See item-level descriptions.
<b>Finding aids</b>	No finding aid.
<b>Associated / related material</b>	Other Dibney records are held by the Provincial Archives of Manitoba and Library and Archives Canada.
<b>Other notes</b>	General note: Record No. M-321;M-322;PA-403

**10.5** Log back in as the Administrator and return to the Visible elements page. **Click on the Digital object metadata hyperlink.** As you can see, some of this information might be confusing for the Public to view, and might clutter an item-level digital object as much of it is computer generated during the upload. Additionally, the original filename may be different from the title of the original photograph or title of the archival description, which could lead to confusion with patrons when requesting materials from the reference desk.

**10.6 Click on the Physical storage hyperlink.** Some institutions choose to hide the physical storage location from their Patrons as a security measure. Fortunately, it can be hidden from the Public and still be available to Staff (with a log-in) for retrieval of materials.