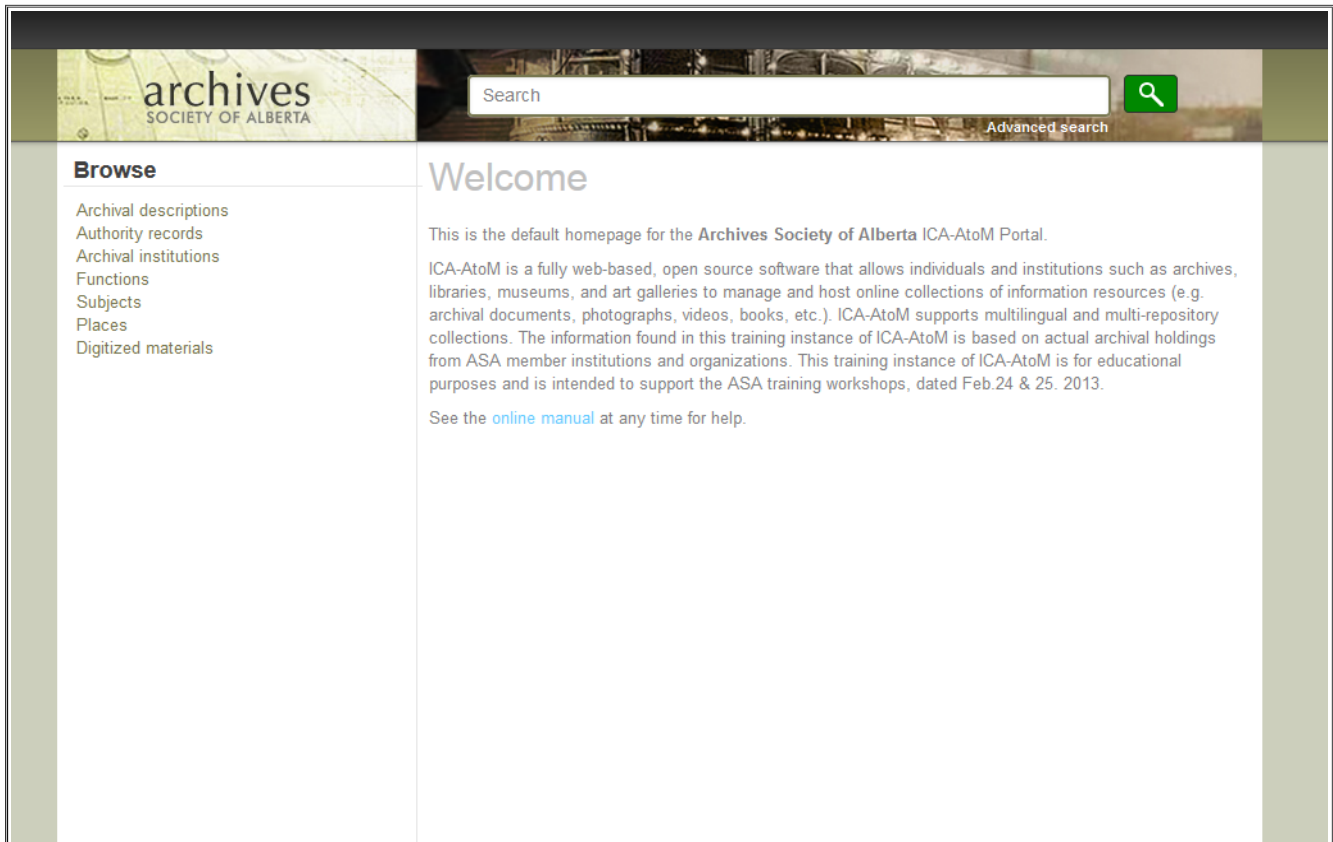


## ICA-AtoM 1.3 Authorized User Training Workshop



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## ICA-AtoM 1.3 Authorized User Training Workshop

### 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

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

1. Log in
2. Browse and Search
  - a) Archival Records
  - b) Authority Records
  - c) Archival Institutions
  - d) Functions
  - e) Subjects
  - f) Places
  - g) Digital Objects
3. Advanced Search
4. Manage
  - a) Physical storage
  - b) Rights holders
  - c) Taxonomies
5. Edit/Add Archival institution
6. Edit/Add/Import Authority record
7. Edit/Add/Import Archival description
8. Edit/Link/Import Digitized materials
9. Add Terms
10. Link Physical storage

### 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 – Authorized Users Training Workshop

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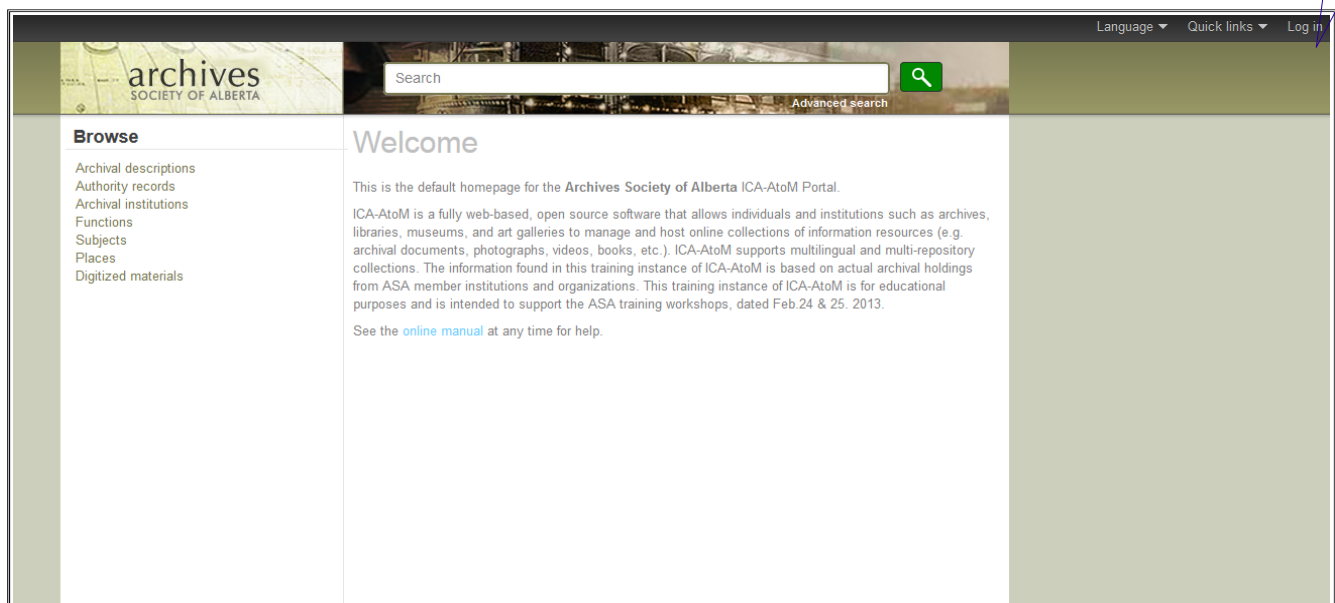
### Tutorial 1.0 Log in

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

Over here!



For this workshop you will log in as an Administrator. 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.*

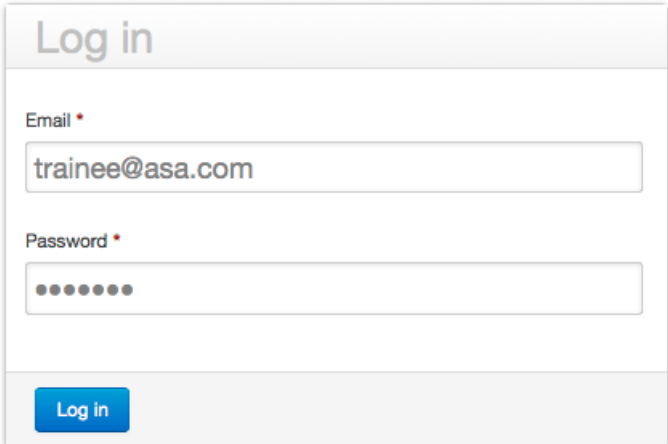
## ICA-AtoM 1.3 Authorized User Training Workshop

**1.2** In the Log in screen enter the following data:

**1.2.1** In **Email** type: *trainee@asa.com*

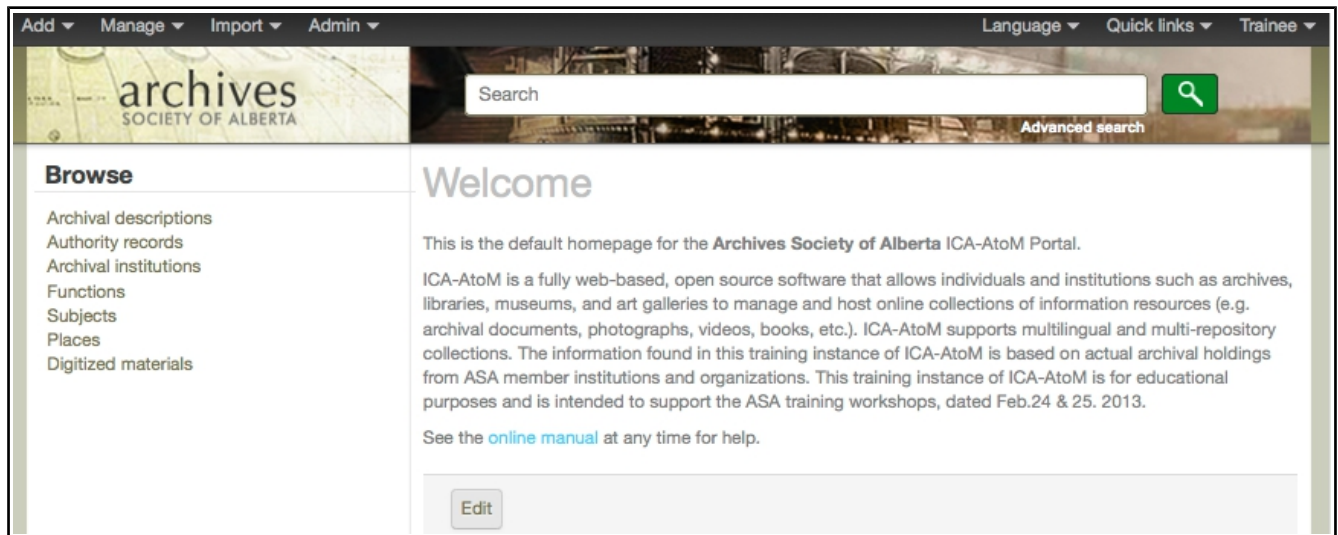
**1.2.2** In **Password** type: *Trainee*

**1.2.3** Click the blue **Log In** button



The image shows a 'Log in' form with a light gray header. Below the header, there are two input fields. The first is labeled 'Email' with a red asterisk and contains the text 'trainee@asa.com'. The second is labeled 'Password' with a red asterisk and contains a series of dots. Below the password field is a blue button with the text 'Log in'.

You are now logged in. Note that the name “Trainee” appears in the right-hand corner of the screen and that you have a new menu bar on the left-side of the screen.



ICA-AtoM is now customized to your User Role as an Administrator.

If you click on Trainee in the right-hand corner of your screen, a drop-down menu gives you the choice to view your Profile or Log out. The Profile shows the User what their privileges are – in the case of an Administrator you have been granted all privileges.

*If a time-lapse of more than 10 minutes occurs during data entry, the system will automatically log you out as a security feature. If this happens during the training workshop, simply log back in according to the instructions above.*

## ICA-AtoM 1.3 Authorized User Training Workshop

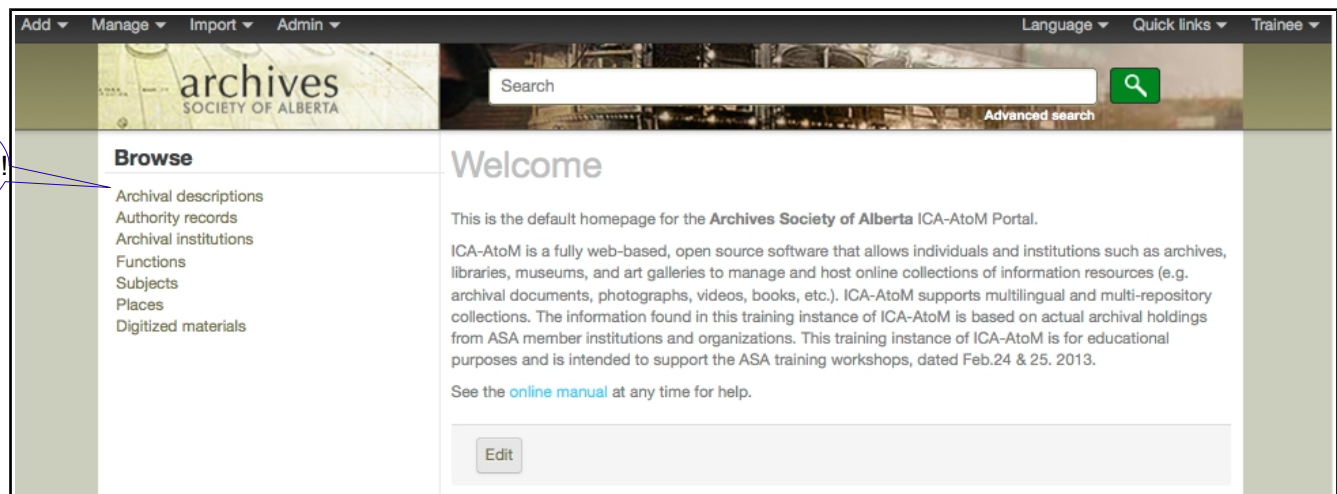
### Tutorial 2.0 Browse and Search

In this tutorial you will learn how to use the Browse and Search features and to navigate ICA-AtoM's menus and links.

## 2.0 Start at ICA-AtoM Homepage

### 2.1 BROWSE ARCHIVAL DESCRIPTIONS

Locate the Browse menu on the left-side of the screen.



The list of resources are hyperlinks. Click on Archival descriptions link.

**2.1.1** By default, the Browse results are displayed 10 at a time and sorted in the order of Recent changes.

You can sort the list Alphabetically by clicking on Alphabetic. This sort view shows the Title, Level and Repository.

**2.1.2** Click on a Title and you will be taken to that specific archival description. Click on the Repository name and you will be taken to that specific archival repository.

*You can use the back button on your browser to return to a previous page at any time in the tutorial.*

*Notice that the majority of hyperlinks in the ASA portal are olive green.*

Recent changes    Alphabetic

### Browse Archival description

Title	Repository	Updated ▾
Catalyst Theatre fonds	University of Alberta Archives	February 13, 2013 7:42 PM
University of Lethbridge photograph collection.	University of Lethbridge Archives	February 12, 2013 5:12 PM
Folk on the Rocks fonds	Northwest Territories Archives	February 12, 2013 5:12 PM
137th Battalion Association fonds	Glenbow Archives	February 12, 2013 5:11 PM
Arthur Erickson fonds	Canadian Architectural Archives	February 12, 2013 5:11 PM
Dibney family fonds	Glenbow Archives	February 8, 2013 1:25 PM

Results 1 to 6 of 6

Search Archival description

## ICA-AtoM 1.3 Authorized User Training Workshop

### 2.1.3 Search Archival description using the search box on the bottom of the Browse Archival descriptions screen.

Type “*Music festival*” into the bottom search box and hit return, or click on the search icon (magnifying glass) on the right side of the search box.

The result is shown below:

The screenshot shows the AtoM search interface. At the top, there is a search bar containing the text "music festival" and a green magnifying glass icon. To the right of the search bar is a link labeled "Advanced search". Below the search bar, the text "Search results" is displayed. The main heading is "Search for [music festival]" followed by a printer icon. Below this, it says "Showing results 1 to 1 of 1 (1.42 seconds)". The search result is titled "Folk on the Rocks fonds". The description states: "This fonds consists of 21 festival programs and eight promotional posters of the Folk on the Rocks Music Festival. The programs date from 1980-2001. There was no program produced for 1986. The majority of the programs are full-colour, although a few ...". Below the description are several fields: "Reference code" with the value "nwt nwt-355", "Creator(s)" with the value "Folk on the Rocks", "Level of description" with the value "Fonds", and "Repository" with the value "Northwest Territories Archives". At the bottom right, it says "Results 1 to 1 of 1".

Notice that the search box at the top of the screen shows the term. This is because an alternative approach to searching archival descriptions is by using the main search box at the top of the screen. We will review the main search box and advanced search in Tutorial 3.0.



### ICA-AtoM 1.3 Authorized User Training Workshop

Review the Search results screen and note the hyperlinks within the results. Each result includes links to the **Archival description**, the related **Authority record** and the related **Repository record**.

**2.1.4** Click on the title “Folk on the Rocks fonds” and you will be taken to the **View archival description** Screen with information about the fonds presented according to RAD format.

You can use the back button on your browser to return to the previous page at any time in the tutorial.

**2.1.5** Click on the Creator name “Folk on the Rocks” and you will be taken to the related **View authority record** Screen with information about the creator presented according to ISAAR format.

You can use the back button on your browser to return to the previous page at any time in the tutorial.

**2.1.6** Click on the Repository name “Northwest Territories Archives” and you will be taken to the related **View repository record** Screen with information about the institution presented according to ISDIAH format.



## 2.2 BROWSE AUTHORITY RECORDS

**Locate the Browse menu on the left-side of the screen.  
The list of resources are hyperlinks. Click on Authority records link.**

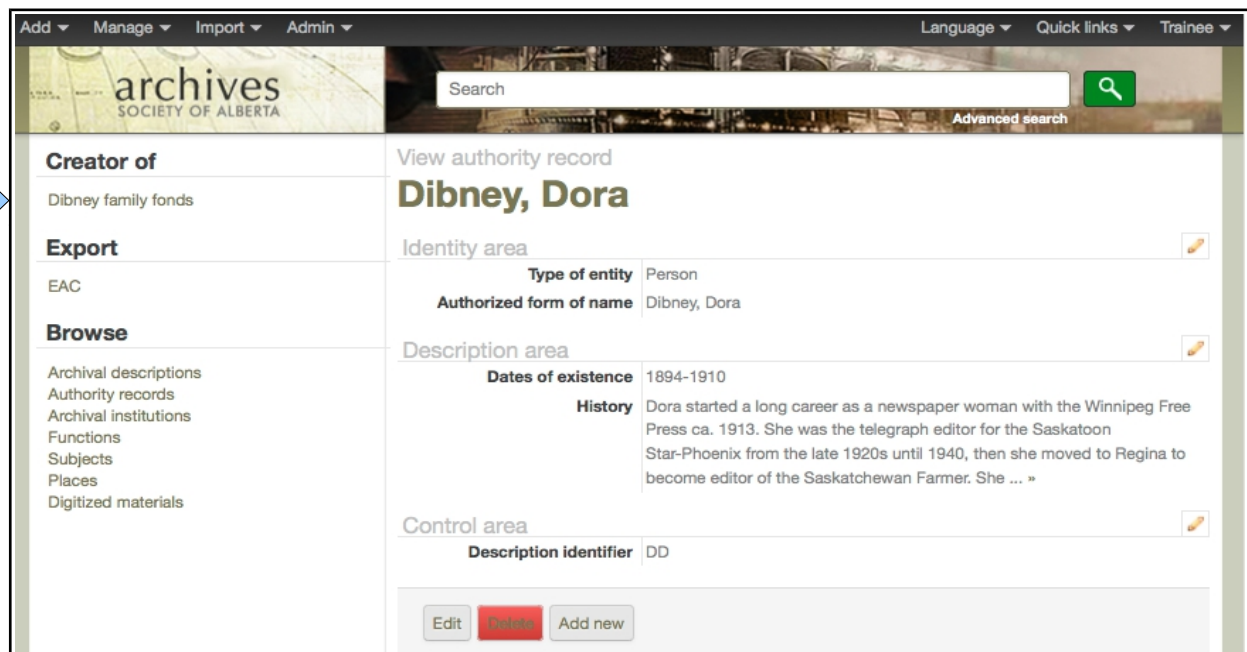
**2.2.1** Review the Browse Person/organization page. By default, the Browse results are displayed 10 at a time and sorted in the order of Recent changes.

You can sort the list Alphabetically by clicking on Alphabetic. This sort view shows the Name, and ISAAR-CPF Type. There is a small grey arrow to the right of the Name header, you can click on this arrow and the sort will reverse from A to Z – to – Z to A.

**2.2.2** Click on “*Dibney, Dora*” and you will be taken to the **View authority record** for that specific person. Alternatively, if the list was pages and pages long – you could type “*Dora Dibney*” into the Search authority records bar at the bottom of the list.

**The search bars provided at the bottom of browse lists are effective methods of finding authority records and archival institutions, instead of using the general search bar, which presents results in the context of archival descriptions.**

Notice that in the Description area, under subheading History: you can click on the ellipses to expand the text and read more about Dora's biographical history. In the left-hand side of the screen there is a column of contextual information, including the related fonds “Dibney family fonds” and the Browse menu.



The screenshot shows the AtoM interface for the Archives Society of Alberta. On the left, a sidebar contains a 'Browse' menu with links to Archival descriptions, Authority records, Archival institutions, Functions, Subjects, Places, and Digitized materials. A blue arrow points to this menu. The main content area displays the 'View authority record' for 'Dibney, Dora'. The record is organized into sections: Identity area (Type of entity: Person, Authorized form of name: Dibney, Dora), Description area (Dates of existence: 1894-1910, History: Dora started a long career as a newspaper woman with the Winnipeg Free Press ca. 1913. She was the telegraph editor for the Saskatoon Star-Phoenix from the late 1920s until 1940, then she moved to Regina to become editor of the Saskatchewan Farmer. She ... »), and Control area (Description identifier: DD). At the bottom, there are buttons for 'Edit', 'Delete', and 'Add new'.






## 2.3 BROWSE ARCHIVAL INSTITUTIONS

**Locate the Browse menu on the left-side of the screen.  
The list of resources are hyperlinks. Click on Archival institutions link.**

**2.3.1** Review the Browse Repository page. By default, the Browse results are displayed 10 at a time and sorted in the order of Recent changes.

You can sort the list Alphabetically by clicking on Alphabetic. This sort view shows the Name, and ISDIAH Type and Country. There is a small grey arrow to the right of the Name header, you can click on this arrow and the sort will reverse from A to Z – to – Z to A.

**2.3.2** Click on “Glenbow Archives” and you will be taken to the **View Repository** screen for that specific institution.

<p><b>Upload limit</b> Upload is disabled (Edit)</p> <p><b>Holdings</b></p> <p>Search </p> <p>137th Battalion Association fonds Dibney family fonds George Dibney's diary George Dibney's memorabilia</p> <p>Results 1 to 4 of 4</p> <p><b>Browse</b></p> <p>Archival descriptions Authority records Archival institutions Functions Subjects Places Digitized materials</p>	<p><b>View Repository</b> <b>Glenbow Archives</b></p> <p><b>Identity area</b> </p> <table border="1"> <tr> <td>Identifier</td> <td>glen</td> </tr> <tr> <td>Authorized form of name</td> <td>Glenbow Archives</td> </tr> <tr> <td>Type</td> <td>Provincial</td> </tr> </table> <p><b>Contact area</b> </p> <table border="1"> <tr> <td> <b>Contact information</b>  Susan Kooyman, Archivist  Douglas Cass, Director, Library and Archives  Lynette Walton, Imperial Oil Archivist  130 - 9 Avenue S.E.  Calgary  Alberta  Canada  T2G 0P3  (403) 232-6569  archives@glenbow.org  http://www.glenbow.org/collections/archives/ </td> </tr> </table> <p><b>Description area</b> </p> <table border="1"> <tr> <td> <b>Geographical and cultural context</b>  Total Volume: 5000 metres  Inclusive Dates: 1840 - current  Predominant Dates: 1870s - current  <b>Holdings</b> The Glenbow Archives acquires, preserves and makes accessible historic records documenting the history of southern Alberta. Our records include the papers of individuals and families, as well as clubs, organizations, businesses, and schools. Some of our ... » </td> </tr> </table> <p><b>Access area</b> </p> <table border="1"> <tr> <td> <b>Opening times</b> Tuesday through Thursday, 10:00 a.m. - 4:30 p.m. </td> </tr> </table> <p> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add new</a> </p>	Identifier	glen	Authorized form of name	Glenbow Archives	Type	Provincial	<b>Contact information</b> Susan Kooyman, Archivist Douglas Cass, Director, Library and Archives Lynette Walton, Imperial Oil Archivist 130 - 9 Avenue S.E. Calgary Alberta Canada T2G 0P3 (403) 232-6569 archives@glenbow.org http://www.glenbow.org/collections/archives/	<b>Geographical and cultural context</b> Total Volume: 5000 metres Inclusive Dates: 1840 - current Predominant Dates: 1870s - current <b>Holdings</b> The Glenbow Archives acquires, preserves and makes accessible historic records documenting the history of southern Alberta. Our records include the papers of individuals and families, as well as clubs, organizations, businesses, and schools. Some of our ... »	<b>Opening times</b> Tuesday through Thursday, 10:00 a.m. - 4:30 p.m.
Identifier	glen									
Authorized form of name	Glenbow Archives									
Type	Provincial									
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<b>Opening times</b> Tuesday through Thursday, 10:00 a.m. - 4:30 p.m.										

On the left-hand side of the screen there is a Holdings section that allows the viewer to see all the archival materials held in the Glenbow Archives. You can use the Search box located under Holdings to search within the Glenbow Archives (as opposed to conducting a search on the entire database, which would require entering a search term into the box at the top of the screen.)

## 2.4 BROWSE FUNCTIONS

**Locate the Browse menu on the left-side of the screen.  
The list of resources are hyperlinks. Click on Functions link.**

**2.4.1** Review the Browse Functions page. By default, the Browse results are displayed 10 at a time and sorted in the order of Recent changes.

You can sort the list Alphabetically by clicking on Alphabetic. This sort view shows the Name and ISDF Type. There is a small grey arrow to the right of the Name header, you can click on this arrow and the sort will reverse from A to Z – to – Z to A.

**2.4.2** Click on “*Grading*” and you will be taken to the **View ISDF Function** screen for that specific function.

The screenshot shows the 'View ISDF function' interface for the 'Grading' function. On the left is a 'Browse' sidebar with links to Archival descriptions, Authority records, Archival institutions, Functions, Subjects, Places, and Digitized materials. The main area is titled 'View ISDF function' and 'Grading'. It contains a 'Description identifier' field with a warning message. Below are three sections: 'Identity area' (Type: Activity, Authorized form of name: Grading), 'Context area' (Description: The activity of grading students at the University of Lethbridge), and 'Relationships area' (Related authority record: University of Lethbridge, Nature of relationship: Grading is an activity that is performed by the University of Lethbridge). At the bottom are 'Edit', 'Delete', and 'Add new' buttons.

In the Relationships area you can view related Functions, Authority records and Archival descriptions. In this example, there is only one related Authority record.

**In general, corporate bodies utilize functions; therefore, your institution may not include archival holdings that require the functions feature.**

*“Functions are often transferred from one corporate body to another. Therefore, it will be much more difficult for the users to reconstitute the context of records creation, if they are only provided with authority records describing corporate bodies that performed the same function. Separated but linked descriptions of functions can improve the understanding of that context and can be used in conjunction with descriptions and authority files as a tool for efficient retrieval of archives and creators descriptions in archival descriptive systems.” [ISDF 2008]*

## 2.5 BROWSE SUBJECTS

**Locate the Browse menu on the left-side of the screen.  
The list of resources are hyperlinks. Click on Subjects link.**

**2.5.1** Review the Browse Subjects page. Unlike the other sort orders, the default for Subject Browse results are displayed 10 at a time and sorted in the order of Alphabetic.

You can sort the list according to Results by clicking on Results. This sort view shows the Subject term and # of Results. There is a small grey arrow to the right of the Results header, you can click on this arrow and the sort will reverse, listing the least results first.

**2.5.2** Click on “*Transportation*” and you will be taken to the **Subjects - Transportation** screen. A list of all relevant archival descriptions with the subject term “transportation” are presented and include the following information: Title, Reference code, Dates, Level of description, Repository and Part of.

You can click on the Browse all subjects button at the bottom of the list and you will be taken back to the full Browse Subjects screen.

or...

**2.5.3** Click on any of the Titles and you will be taken to a View archival description screen for the relevant resource.

If you scroll down to the bottom of the page you will see a section called **Access points**. Notice that Transportation is included in the list of **Subject access points**.

If you click on Transportation it will take you to a list of all archival descriptions with the subjects term “transportation”.

If you click on a different subject access point it will take you to a list of all archival descriptions which include that specific subject term.

*You can use the back button on your browser to return to the previous page at any time in the tutorial.*

Browse	Subjects - Transportation
<ul style="list-style-type: none"> <li>Archival descriptions</li> <li>Authority records</li> <li>Archival institutions</li> <li>Functions</li> <li>Subjects</li> <li>Places</li> <li>Digitized materials</li> </ul>	<p><b>Dibney family fonds</b></p> <p>The fonds consists of manuscript of novel, “And Wisdom to Know”; manuscript about and photograph of Reverend J. Antle and the Columbia Coast Mission; newspaper articles by and about her (1934-1966); miscellaneous correspondence (1939-1967); and br...</p> <p><b>Reference code</b> CA glen glen-835</p> <p><b>Date(s)</b> 1904-1967 (Creation) Dibney, Dora</p> <p><b>Level of description</b> Fonds</p> <p><b>Repository</b> Glenbow Archives</p> <hr/> <p><b>George Dibney's diary</b></p> <p><b>Reference code</b> CA glen glen-835-lw-glen-161</p> <p><b>Date(s)</b> 1906 (Creation) Dibney, George</p> <p><b>Level of description</b> Item</p> <p><b>Repository</b> Glenbow Archives</p> <p><b>Part of</b> Dibney family fonds</p> <hr/> <p><b>George Dibney's memorabilia</b></p> <p><b>Reference code</b> CA glen glen-835-lw-glen-163</p> <p><b>Date(s)</b> 1905-1907 (Creation) Dibney, George</p> <p><b>Level of description</b> Item</p> <p><b>Repository</b> Glenbow Archives</p> <p><b>Part of</b> Dibney family fonds</p> <p>Results 1 to 3 of 3</p> <p><a href="#">Browse all Subjects</a></p>

## 2.6 BROWSE PLACES

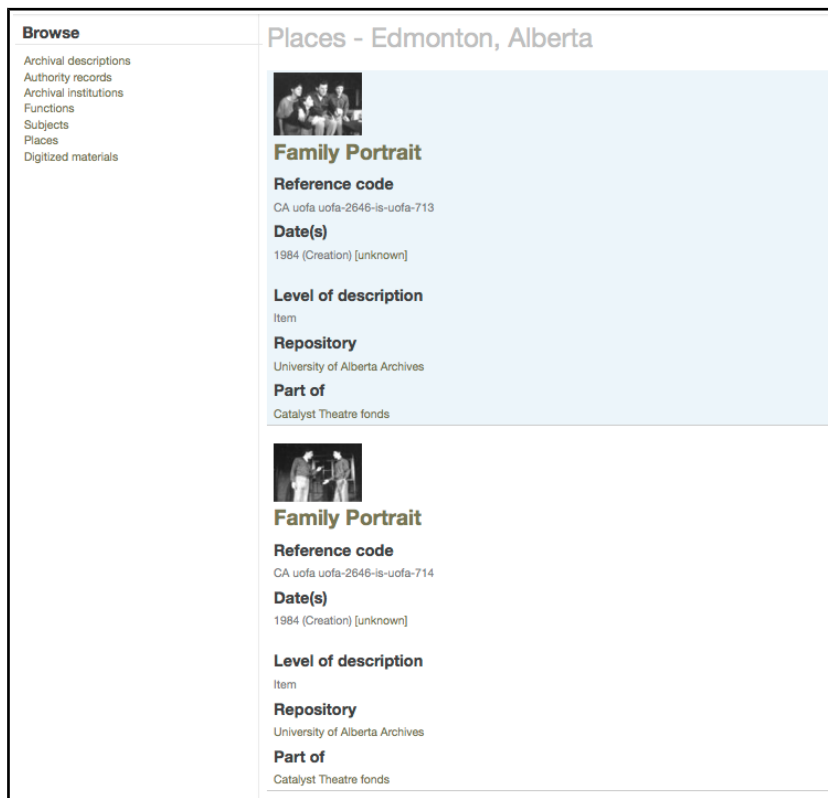
**Locate the Browse menu on the left-side of the screen.  
The list of resources are hyperlinks. Click on Places link.**

**2.6.1** Review the Browse Places page. Unlike the other sort orders, the default for Places Browse results are displayed 10 at a time and sorted in the order of Alphabetic.

You can sort the list according to Results by clicking on Results. This sort view shows the Places name and # of Results. There is a small grey arrow to the right of the Results header, you can click on this arrow and the sort will reverse, listing the least results first.

**2.6.2** Click on “*Edmonton, Alberta*” and you will be taken to the **Places – Edmonton, Alberta** screen. A list of all relevant archival descriptions with the places term “Edmonton, Alberta” are presented. Note that item-level descriptions with images show thumbnails in result list.

See below (screen has been cropped):



You can click on the Browse all places button at the bottom of the list and you will be taken back to the full Browse Places screen.

Or...

**2.6.3** Click on any of the Titles and you will be taken to a View archival description screen for the relevant resource.

If you scroll down to the bottom of the page you will see a section called **Access points**. Notice that Edmonton, Alberta is included in the list of **Places access points**.

If you click on Edmonton, Alberta it will take you to a list of all archival descriptions with the places term “Edmonton, Alberta”.

If you click on a different places access point it will take you to a list of all archival descriptions which include that specific places term.

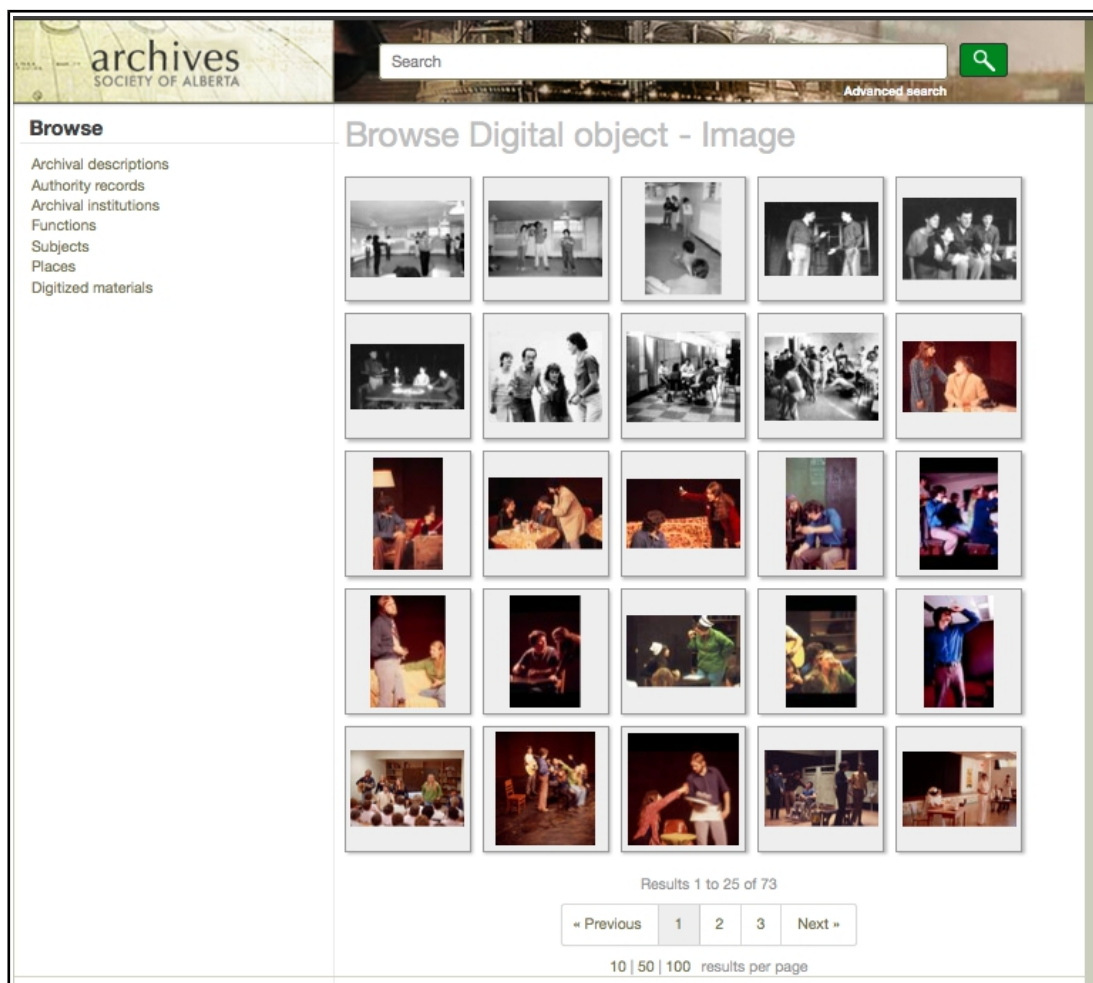
*You can use the back button on your browser to return to the previous page at any time in the tutorial.*

## 2.7 BROWSE DIGITIZED MATERIALS

Locate the **Browse** menu on the left-side of the screen.  
The list of resources are hyperlinks. Click on **Digitized materials** link.

**2.7.1** Review the Browse Digital objects page. Unlike the other Browse pages, the **Browse Digital objects** page provides only one view: a list of Media types and # of Results. The default media types are: Image, Video, Audio, Textual (for scanned pdf).

**2.7.2** Click on “Image” and view the **Browse Digital object – Image** screen.



**2.7.3** You can scroll through the pages using the buttons at the bottom of the screen. You can hover over the thumbnails to view additional information: Title and Part of. Click on any of the thumbnails and ICA-AtoM takes you to the related archival description view page.



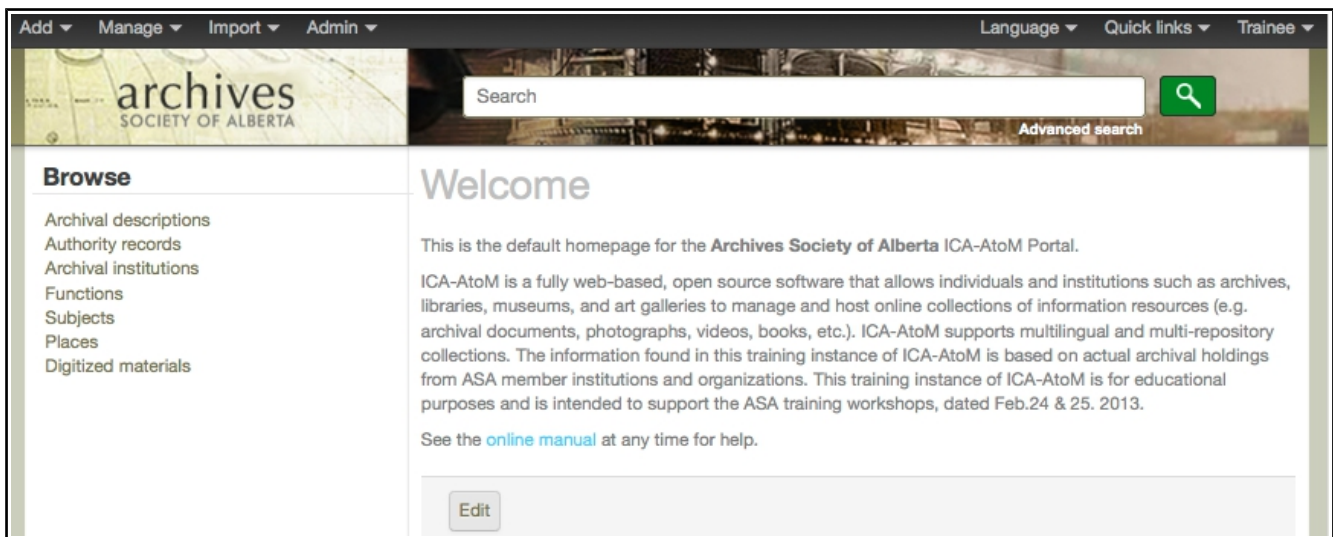
## ICA-AtoM 1.3 Authorized User Training Workshop

### Tutorial 3.0 Advanced Search

In this tutorial you will learn how to perform a general Search on the database and how to perform an Advanced Search.

#### 3.0 Start at ICA-AtoM Homepage

**3.1** The Search bar is available at the top of every screen in ICA-AtoM. To start a general search, simply type a term into the box and hit return, or click on the search icon (magnifying glass).



**3.2** Perform a general search by typing the term "Correspondence" into the search bar. Click on the search icon or hit return.



Notice that you receive a number of results and the time taken to execute the search.

**3.3** Click on the **Advanced search** (white link) underneath the search bar.



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**3.4** Add the term “personal” in the second row of the Advanced search and click the blue Search button. You have now instructed ICA-AtoM to search for “correspondence and personal”. The results should be limited now to “2”.

**3.5** Click on the Filter/Limit button to open more options. Click on the arrow at the right-hand side of the Digital object available box. From the drop-down, select “YES”. Click on the blue Search button. You have now instructed ICA-AtoM to search for “correspondence and personal” and to limit the results to archival descriptions with a digital object attached.

**3.6** Click on the result and you will be taken to a View archival description page for “L01” item-level description.

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### Search and Advanced Search Summary

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ICA-AtoM 1.3 provides a number of options for advanced searching from within the search box and with the assistance of filters in the advanced search interface.

The User Manual covers the types of Boolean operators permitted: And, Or, NOT. Along with a list of Symbols that perform specific search functions.

For Example:

Symbol	Use
"	Term enclosed in quotes must appear exactly as provided. Example: "towel" will find towel, but not towels.
+	Term after "+" must be in the result. Example: +tea cricket requires that results that must contain the term tea in them, and may have the term cricket.
-	Term after "-" must not be in the result. Example: -tea cricket requires that results that must not contain the term tea in them, and may have the term cricket.
?	Single character wildcard. Example: p?per will find paper and piper, but not pepper.
*	Multiple character wildcard. Example: galax* will find galaxy and galaxies, but not galactic.
~	Fuzzy search. Will return results with words similar to the term. Example: fjord~ will find fjord, fjords, ford, form, fonds, etc.
&&	Boolean operator. Can be used in place of AND. Will cause an error if combined with spelled-out operators. Example: Arthur && Ford AND Zaphod will fail; Arthur && Ford && Zaphod will succeed.
!	Boolean operator. Can be used in place of NOT. Will cause an error if combined with spelled-out operators.
^	Boost relevance. Multiplies the relevance of the preceding term by the number following the symbol, affecting the sorting of the search results. Example: paranoid android^5 gives results containing the term "android" 5x the relevance as results containing only the word "paranoid", and will sort them closer to the start of the search results.
\	Escapes the immediately following character, so that it is treated as text, rather than as a special character.
()	Used to group search clauses.
[]	Closed interval range search. Example: title:["Frogstar" TO "Magrathea"] will find every title in the alphabetic range between "Frogstar" and "Magrathea", including "Frogstar" and "Magrathea".
{ }	Open interval range search. Example: title:{ "Frogstar" TO "Magrathea" } will find every title in the alphabetic range between "Frogstar" and "Magrathea", excluding "Frogstar" and "Magrathea".

Additionally, ICA-AtoM can restrict searching to specific fields, either through the Advanced search drop-downs or by typing the field name into the general search box and then following it with a colon. This is explained in the User Manual in the Advanced search section under the subsection: Field names for advanced searching.

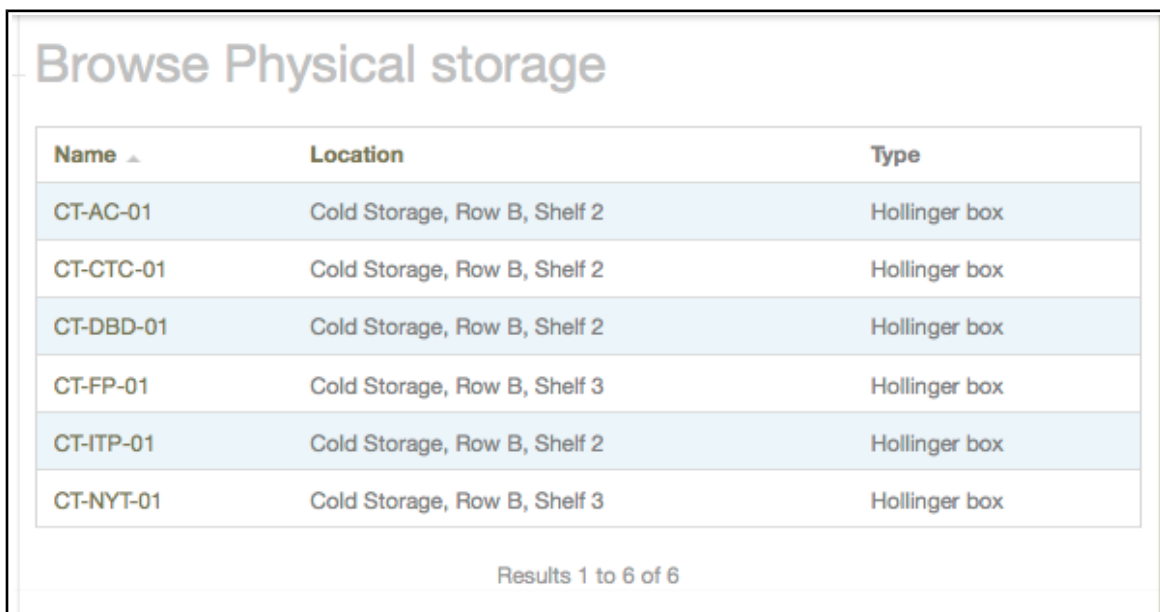
## Tutorial 4.0 Manage

In this tutorial you will learn how to Manage your Physical Storage, Rights Holders and Taxonomies.

### 4.0 Start at ICA-AtoM Homepage

### 4.1 MANAGE PHYSICAL STORAGE

**4.1.1** In the top left-hand corner of the screen there is a menu with “Manage” in it. Click on **Manage** and select “**Physical Storage**” from the drop-down.



The screenshot shows a web interface titled "Browse Physical storage". It contains a table with three columns: "Name", "Location", and "Type". The table lists six items, all of which are "Hollinger box" type. Below the table, it says "Results 1 to 6 of 6".

Name	Location	Type
CT-AC-01	Cold Storage, Row B, Shelf 2	Hollinger box
CT-CTC-01	Cold Storage, Row B, Shelf 2	Hollinger box
CT-DBD-01	Cold Storage, Row B, Shelf 2	Hollinger box
CT-FP-01	Cold Storage, Row B, Shelf 3	Hollinger box
CT-ITP-01	Cold Storage, Row B, Shelf 2	Hollinger box
CT-NYT-01	Cold Storage, Row B, Shelf 3	Hollinger box

Results 1 to 6 of 6

The purpose of Manage Physical Storage is to provide an overview of the location of archival materials. The Name is a hyperlink.

**4.1.2** Click on “CT-CTC-01” and ICA-AtoM takes you to the **View Physical Storage** page. You have the opportunity to Edit or Delete and Print Icon (printer).

**4.1.3** Click on the Print icon and view the list of materials in Hollinger box: CT-CTC-01. Use the browser arrows to back one page.

**4.1.4** Click on the related resource “*Creating Theatre for Change project*” and ICA-AtoM takes you to the View archival description for that fonds-level resource. In the context menu on the bottom left of the screen you will see the **Physical Storage** area, which is presented as a hyperlink.

## 4.2 MANAGE RIGHTS HOLDERS

Go to the **Manage** menu in the top-left corner of the **Screen** and Select **Rights Holders** from the drop-down list. Rights, based on PREMIS are a new addition to ICA-AtoM and include Copyright, License, Statute, Policy, and Donor. These can be used in addition to the standard “Restrictions on Access” field in the archival description.

Recent changes    Alphabetic

### Browse rights holder

Name	Updated ▾
Glenbow Archives	February 19, 2013 7:58 PM

Results 1 to 1 of 1

Search rights holder

**4.2.1** The default browse list for **Rights holder** is recent changes, but you can switch the view to Alphabetic. In this example there is only one rights holder. Click on “*Glenbow Archives*” link and ICA- AtoM takes you to the contact information for the personnel responsible for managing Rights and Access Permissions at the Glenbow Archives.

View rights holder

### Glenbow Archives

Authorized form of name | Glenbow Archives

Contact area

Contact information | Susan Kooyman, Archivist  
Douglas Cass, Director, Library and Archives  
Lynette Walton, Imperial Oil Archivist  
1-800-345-0987  
archives@glenbow.calgary.ca

Edit    Delete    Add new

An in-depth discussion of Rights is beyond the scope of this workshop; however, the ICA-AtoM User manual explains how to create Rights and provides examples of each type.

## 4.3 MANAGE TAXONOMIES

Go to the **Manage** menu in the top-left corner of the Screen and Select **Taxonomies** from the drop-down list.

List taxonomies	
Name	Note
Accession acquisition type	
Accession processing priority	
Accession processing status	
Accession resource type	
Actor Relation Type	Actor-to-Actor relationship categories defined by the ICA ISAAR (CPF) specification, 2nd Edition, Section 5.3.2, 'Category of relationship'.
Copyright status	
Deaccession scope	
Description Detail Levels	
Description Statuses	
Dublin Core Types	Fixed values for the DC Type element as prescribed by the DCMI Type Vocabulary

Results 1 to 10 of 26

« Previous 1 2 3 Next »

10 | 50 results per page

**4.3.1** There are 26 taxonomies in ICA-AtoM 1.3. A Taxonomy in ICA-AtoM is defined as: *“a grouping of controlled-vocabulary terms used to generate value lists and access points.”*

Throughout ICA-AtoM these taxonomies generate drop-down lists. Many of which restrict data entry into certain fields. Many of the taxonomies are locked and cannot be changed without altering the application's underlying code. However, new terms can be added to a number of taxonomies.

## ICA-AtoM 1.3 Authorized User Training Workshop

**4.3.2** Go to the bottom of the screen and Click on page “2”. Click on “Material Type” hyperlink from the list of taxonomies.

List Material Type	
Material Type term	Scope note
Architectural drawing	
Cartographic material	
Graphic material	
Moving images	
Multiple media	
Object	
Philatelic record	
Sound recording	
Technical drawing	
Textual record	
Results 1 to 10 of 10	
<input type="button" value="Add new"/>	

Material type is a controlled vocabulary that supports the Canadian Rules for Archival Description (RAD).

**4.3.3** You have the option to Click on the “Add New” button at the bottom of the page and create a new material type. If you do so, click the Save button and now your new term has been added to the Material Type taxonomy.

We will have more practice adding Terms in Tutorial 9.0. But for now, it is important to know how the taxonomies are managed.

## ICA-AtoM 1.3 Authorized User Training Workshop

### Tutorial 5.0 Add/Edit Archival Institution

In this tutorial you will learn how to Add and Edit an Archival Institution using the ISDIAH compliant template.

#### 5.0 Add Menu – Select Repositories

**5.1** Start at the top of the Edit Repository – ISDIAH screen and Click the Identity area hyperlink to open.

The screenshot shows a web form titled "Edit Repository - ISDIAH" with a subtitle "Untitled". The form contains six expandable sections, each with a right-pointing triangle icon and a label: "Identity area", "Contact area", "Description area", "Access area", "Services area", and "Control area". At the bottom of the form, there are two buttons: "Cancel" and "Create".

In the following exercise you will create a new description for an archival institution, “Medicine Hat 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 any additional data in fields that are not included in this exercise.



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**5.2** In Identifier type *MHA* (acronym for Medicine Hat Archives). Data entry fields with **red asterisks** are required by the content standard.

**5.3** In Authorized form of name, type *Medicine Hat Archives*

**5.4** In Type, select *Community* from the drop-down list. Be patient, working with drop-downs in ICA-AtoM takes some practice. If you make a mistake you can always delete it by clicking on the “x” that appears next to the data entry field after selection.

**5.5** Notice that when you begin typing information into a data entry field a Tooltip appears in shaded blue. Tooltips are online text designed to assist Users while entering data into edit pages. The Tooltips are derived from the content standard on which the edit template is based, in this example it is based on ISDIAH.

*If you are taking a long time to enter information, you might want to click on the Create button at the bottom of the page to make sure the browser does not time-out and lose your data. Once created, you can always Click on the Edit button and continue adding information into the Repository template.*

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In this step you will add a mailing address to the archival institution's description.

**5.6** Click on Contact Area to open. Click on the “Add New” hyperlink and enter:

In Contact Person - Johnson, Don  
In Telephone – 1-800-345-1234  
In Email – [don@medicinehatarchives.ca](mailto:don@medicinehatarchives.ca)

Click on the Physical Location tab and enter:

In Street Address – 88 Nelson Street  
In Region/province – Alberta  
In Country – Canada (be careful this is an auto-suggest box)  
In City – Medicine Hat

Click on the SUBMIT button.

*if you are taking a long time to enter information, you might want to click on the Save button at the bottom of the page to make sure the browser does not time-out and lose your data. This also gives you a chance to see what you have entered. (See below)*

View Repository

## Medicine Hat Archives

Identity area

IdentifierMHA
Authorized form of nameMedicine Hat Archives
TypeCommunity

Contact area

Contact information

**Johnson, Don**  
88 Nelson Street  
Medicine Hat  
Alberta  
Canada  
1-800-345-1234  
[don@medicinehatarchives.ca](mailto:don@medicinehatarchives.ca)

Edit
Delete
Add new

**5.7** Click on the **Edit** button in the bottom of the screen and continue to enter data into the **Description area, Access area, Services area and Control area**. Have fun creating your own archival repository. But don't spend too long, as there are more tutorials to complete. Once you have completed entering all the information, remember to Click the Save button at the bottom of the page. **See the next page for an example of what your completed Repository Record could look like.**

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## ICA-AtoM 1.3 Authorized User Training Workshop

**5.8 To Edit** information in an **Archival Repository** template, ICA-AtoM provides two different methods:

The first is to Click on the Edit button at the bottom of the page, this will change the screen from **View Repository** to **Edit Repository**.

The second is to Click on the Pencil Icon (wooden pencil in box) that you see on the right-hand side of the Areas. This gives you direct Edit access to a specific area in the Repository template.

For example, if you Click the Pencil Icon for the Identity Area you should see the screen below:

The screenshot shows a web form titled "Edit Repository - ISDIAH" with the main heading "Medicine Hat Archives". The form is divided into sections by expandable/collapsible buttons. The "Identity area" button is expanded, showing the following fields: "Identifier \*" with the value "MHA", "Authorized form of name \*" with the value "Medicine Hat Archives", "Parallel form(s) of name" (empty), and "Other form(s) of name" (empty). Below these is a "Type" section with a dropdown menu currently showing "Community". At the bottom, the "Contact area" and "Description area" buttons are collapsed. The form has a clean, white background with light gray borders and a sans-serif font.

Notice that the other areas of the data entry template are closed. Go ahead and add some new information and then Click the blue Save button at the bottom of the screen.

**Congratulations! You have created and edited an Archival Repository record.**

## ICA-AtoM 1.3 Authorized User Training Workshop

### Tutorial 6.0 Add/Edit/Import Authority Record

In this tutorial you will learn how to Add, Edit and Import an Authority record using the ISAAR-CPF compliant template.

#### 6.0 Add Menu – Select Persons/organizations

**6.1** Start at the top of the Edit Person/organization – ISAAR screen and Click the Identity area hyperlink to open.

Edit Person/organization - ISAAR

**Untitled**

▷ Identity area

▷ Description area

▷ Relationships area

▷ Control area

Cancel Create

In the following exercise you will create a new authority record for a person, “Alf Brunner”. Each step is explained and all the required data is provided for you. Once you are comfortable with the process feel free to input any additional data in fields that are not included in this exercise.

## ICA-AtoM 1.3 Authorized User Training Workshop

### 6.2 In Identity area type the following data:

In Type of entity – select Person from the drop-down list

In Authorized form of name type – Brunner, Alf

*Note that the Tooltips appear as you type, these are based on the ISAAR content standard.*

The screenshot shows the 'Edit Person/organization - ISAAR' form in the ICA-AtoM 1.3 interface. The form is titled 'Untitled' and is in the 'Identity area'. The 'Type of entity' is set to 'Person'. The 'Authorized form of name' field contains 'Brunner, Alf'. A tooltip is visible over the 'Authorized form of name' field, providing instructions on how to record the standardized form of name according to the ISAAR 5.1.2 standard. The form also includes fields for 'Parallel form(s) of name', 'Standardized form(s) of name according to other rules', 'Other form(s) of name', and 'Identifiers for corporate bodies'. At the bottom, there are buttons for 'Cancel' and 'Create'.

*If you are taking a long time to enter information, you might want to click on the Create button at the bottom of the page to make sure the browser does not time-out and lose your data. Once created, you can always Click on the Edit button and continue adding information into the Authority record template.*

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### 6.3 In this step you will add information into the Description area.

In **Dates of existence** type: 1900-1990

In **History** type: Alf Brunner was the grandson of Jacob Brunner. Alf had four brothers, Frank, John, Nick and Jake and three sisters, Barbara, Kath, and Lena who died at age 16 years. All of the siblings moved away and only Alf remained to farm the original homestead until he retired to Medicine Hat in 1977.

In **Places** type: Medicine Hat, Alberta

Click on the blue **Save** button at the bottom of the template.

*This also gives you a chance to see what you have entered. (See below)*

View authority record

## Brunner, Alf

Description identifier - This is a mandatory element.

Identity area

Type of entity
Person
Authorized form of name
Brunner, Alf

Description area

Dates of existence
1900-1990
History
Alf Brunner was the grandson of Jacob Brunner. Alf had four brothers, Frank, John, Nick and Jake and three sisters, Barbara, Kath, and Lena who died at age 16 years. All of the siblings moved away and only Alf remained to farm the original homestead ... »
Places
Medicine Hat, Alberta

Edit
Delete
Add new



## ICA-AtoM 1.3 Authorized User Training Workshop

**6.4** To **Edit** information in an Authority record template, ICA-AtoM provides two different methods:

The first is to Click on the Edit button at the bottom of the page, this will change the screen from **View Authority record** to **Edit Person/organization ISAAR**.

The second is to Click on the Pencil Icon (wooden pencil in box) that you see on the right-hand side of the Areas. This gives you direct Edit access to a specific area in the Authority Record template.

**6.5** Select the pencil icon for the **Description area** and add “*Austria*” to the Places field (using a separate line in the data entry box).

**6.6** Click on the **Control area** and add the following data:

In **Description identifier** type – *AB-01*

In **Institution identifier** type – *CA-MHA*

In **Status** select - *Draft*

In **Level of detail** select – *Partial*

Click on the **Save** button at the bottom of the screen.

View authority record  
**Brunner, Alf**

Identity area		
Type of entity	Person	
Authorized form of name	Brunner, Alf	
Description area		
Dates of existence	1900-1990	
History	Alf Brunner was the grandson of Jacob Brunner. Alf had four brothers, Frank, John, Nick and Jake and three sisters, Barbara, Kath, and Lena who died at age 16 years. All of the siblings moved away and only Alf remained to farm the original homestead ... »	
Places	Medicine Hat, Alberta Austria	
Control area		
Description identifier	AB-01	
Institution identifier	CA-MHA	
Status	Draft	
Level of detail	Partial	

Edit
Delete
Add new

## ICA-AtoM 1.3 Authorized User Training Workshop

**6.7** ICA-AtoM also provides the ability to **Import** an Encoded Archival Context (EAC) XML file. This means that you can exchange Authority records from other databases or systems with ICA-AtoM using EAC XML.

To **Import an Authority Record** navigate to the top left-hand corner of the screen and **Click** on **Import**. From the drop-down list select **XML**.

**6.8** Click on the Browse button and select the XML file on your desktop entitled “**brunner-jacob;eac.xml**”.

Once the path appears in the data entry window, Click on the blue **Import** button.

**6.9** When prompted by ICA-AtoM, Click on the View Person/organization button.

View authority record	
<b>Brunner, Jacob</b>	
<u>Identity area</u>	
Type of entity	Person
Authorized form of name	Brunner, Jacob
<u>Description area</u>	
Dates of existence	1870-1940
History	Jacob was born in Austria in 1870 and came to homestead in the Semans, Saskatchewan area with his wife and two brothers in about 1907.
Places	Austria
Legal status	Married
<u>Control area</u>	
Description identifier	JB-01
Institution identifier	CA-MHA
Maintenance notes	created February 19, 2013 10:35:40 PM PST human  revised February 19, 2013 10:35:40 PM PST human
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add new</a>	

## ICA-AtoM 1.3 Authorized User Training Workshop

**6.10** Click on the **Edit** button at the bottom of the screen. Open the **Relationships area** by clicking on the hyperlink. Click on “**Add new**” and enter the following information into the pop-up dialogue:

In **Authorized form of name** type – *Brunner, Alf* (the auto-suggest will provide this option)

In **Category of relationship** select – *family*

In **Description of relationship** type – *Jacob is the father of Alf Brunner*

Click on the blue **Submit** button.

Click on the blue **Save** button.

View authority record

**Brunner, Jacob**

Identity area

Type of entity	Person
Authorized form of name	Brunner, Jacob

Description area

Dates of existence	1870-1940
History	Jacob was born in Austria in 1870 and came to homestead in the Semans, Saskatchewan area with his wife and two brothers in about 1907.
Places	Austria
Legal status	Married

Relationships area

Related entity	Brunner, Alf (1900-1990)
Identifier of the related entity	AB-01
Category of the relationship	family
Description of relationship	Jacob is the father of Alf Brunner

Control area

Description identifier	JB-01
Institution identifier	CA-MHA
Maintenance notes	created February 19, 2013 10:35:40 PM PST human  revised February 19, 2013 10:35:40 PM PST human

Edit Delete Add new

When you view the Authority record for Jacob Brunner you now see a relationship with his son, Alf Brunner. You can click on the hyperlink name and it will take you to Alf Brunner's authority record (and presents the relationship there as well). This is just one of the many ways in which ICA-AtoM helps you create complex relationships between entities such as authority records.

## ICA-AtoM 1.3 Authorized User Training Workshop

### Tutorial 7.0 Add/Edit/Import Archival description

In this tutorial you will learn how to Add, Edit and Import an Archival description using the RAD compliant template.

## 7.0 Add Menu – Select Archival descriptions

**7.1** Start at the top of the **Edit archival description – RAD** screen and Click the **Title and statement of responsibility area** hyperlink to open.

The screenshot shows a web interface titled "Edit archival description - RAD". Below the title is a large text input field labeled "Untitled". Below this is a vertical list of sections, each with a small right-pointing triangle icon and a label: "Title and statement of responsibility area", "Edition area", "Class of material specific details area", "Dates of creation area", "Physical description area", "Publisher's series area", "Archival description area", "Notes area", "Standard number area", "Access points", "Control area", "Rights area", and "Administration area". At the bottom of the form are two buttons: "Cancel" and "Create".

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In the following exercise you will create a new archival description for a fonds entitled, “Alf Brunner fonds”. Each step is explained and all the required data is provided for you. Once you are comfortable with the process feel free to input any additional data in fields that are not included in this exercise.

**7.2** In **Title and statement of responsibility area** type the following data:

In **Title proper** type – *Alf Brunner fonds*

In **General material designation** select – *Graphic material*

In **Level of description** select – *Fonds*

In **Add new child levels**, under **Level** select – *Series*

In **Add new child levels**, under **Title** type – *Photographs*

In **Repository** start typing – *Medicine Hat Archives* (the auto-suggest will present Medicine Hat Archives and you should select it)

In **Identifier** type – *ABF*

*Note that the Tooltips appear as you type, these are based on the RAD content standard.*

**Click** on the blue **Create** button at the bottom of the screen and check your work.

The screenshot displays the ICA-AtoM interface. On the left, a sidebar menu shows the 'Fonds' section with a list of archival fonds, including 'Alf Brunner fonds' which is highlighted. Below this are sections for 'Import' (XML, CSV), 'Export' (Dublin Core 1.1 XML, EAD 2002 XML), and 'Browse' (Archival descriptions, Authority records, Archival institutions, Functions, Subjects, Places, Digitized materials). The main content area is titled 'View archival description' and shows the details for 'Alf Brunner fonds'. A warning message states: 'This archival description requires at least one date. Physical description - This is a mandatory element. Scope and content - This is a mandatory element.' Below this, the 'Title and statement of responsibility area' is displayed with the following fields: 'Title proper' (Alf Brunner fonds), 'General material designation' (Graphic material), 'Level of description' (Fonds), and 'Repository' (Medicine Hat Archives). At the bottom of the main area, there is a toolbar with buttons for 'Edit', 'Delete', 'Add new', 'Duplicate', 'Move', 'Link digital object', 'Import digital objects', and 'Link physical storage'.

You are viewing the archival description that you started. Notice in the left-side of the screen in the context menu there is a list of Fonds and that Alf Brunner fonds is highlighted.

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**7.3** Navigate to the context menu and the list of Fonds. **Click on the small arrow.** The treeview opens and you can see the series-level description title “Photographs” that you added earlier as a child-level.

**7.4** Navigate back to the **Edit** button underneath your **archival description of Alf Brunner fonds**. Work your way through the different areas, adding information to your archival description.

When you get to the **Dates of creation area** Click on the **Add new** hyperlink. Enter the following data into the Event pop-up dialogue:

In **Actor name** select – *Brunner, Alf* (the auto-suggest will provide you with a list of names)  
In **Event type** select – *Creation*  
In **Place** type – *Medicine Hat*  
In **Date** type – *ca.1910-1990*

Click on the blue **Submit** button. Click on the blue **Save** button.

**7.5** Navigate back to the **Edit** button underneath your **archival description of Alf Brunner fonds**. Work your way through the different areas, adding information to your archival description. Stop once you get to the **Access points** area, enter the following data:

In **Subject access points** type – *Agriculture* (don't be tempted to pick from the suggestions)  
In **Place access points** type – *Medicine Hat*

Click on the blue **Save** button

**7.6** Work your way through the different areas, adding information to your archival description. Stop once you get to the **Administrator Area** and open **Publication status**.

The publication status in ICA-AtoM presents a method for Administrators and/or Archivists to choose the status of an archival description – either Published or Draft. An archival description with published status can be viewed by anyone (e.g., logged-in or public users on the Internet); whereas, and archival description with draft status can only be viewed by authorized users with log-in permissions. This is a powerful tool for Archivists who want to review the work of Volunteers, Interns or Students that may be entering information but require review by a superior before the descriptions are made available to the public.

Select either **Published** or **Draft** and Click on the blue **Save** button.

**See the next page for the finished archival description for the Alf Brunner fonds.**

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<b>Repository</b> Medicine Hat Archives	View archival description <b>Alf Brunner fonds</b>								
<b>Creator(s)</b> Brunner, Alf	Title and statement of responsibility area								
<b>Fonds</b> ... ► Folk on the Rocks fonds University of Lethbridge photograph colle... ► Dibney family fonds ► Catalyst Theatre fonds ► <b>Alf Brunner fonds</b>	<table border="1"> <tr> <td><b>Title proper</b></td> <td>Alf Brunner fonds</td> </tr> <tr> <td><b>General material designation</b></td> <td>Graphic material</td> </tr> <tr> <td><b>Level of description</b></td> <td>Fonds</td> </tr> <tr> <td><b>Repository</b></td> <td>Medicine Hat Archives</td> </tr> </table>	<b>Title proper</b>	Alf Brunner fonds	<b>General material designation</b>	Graphic material	<b>Level of description</b>	Fonds	<b>Repository</b>	Medicine Hat Archives
<b>Title proper</b>	Alf Brunner fonds								
<b>General material designation</b>	Graphic material								
<b>Level of description</b>	Fonds								
<b>Repository</b>	Medicine Hat Archives								
<b>Import</b> XML CSV	Dates of creation area								
<b>Export</b> Dublin Core 1.1 XML EAD 2002 XML	<table border="1"> <tr> <td><b>Date(s)</b></td> <td>ca.1910-1990 (Creation)</td> </tr> <tr> <td><b>Place</b></td> <td>Medicine Hat</td> </tr> </table>	<b>Date(s)</b>	ca.1910-1990 (Creation)	<b>Place</b>	Medicine Hat				
<b>Date(s)</b>	ca.1910-1990 (Creation)								
<b>Place</b>	Medicine Hat								
<b>Browse</b> Archival descriptions Authority records Archival institutions Functions Subjects Places Digitized materials	Physical description area								
	<table border="1"> <tr> <td><b>Physical description</b></td> <td>5 photographs; b &amp; w silver gelatin prints</td> </tr> </table>	<b>Physical description</b>	5 photographs; b & w silver gelatin prints						
<b>Physical description</b>	5 photographs; b & w silver gelatin prints								
	Archival description area								
	<table border="1"> <tr> <td><b>Name of creator</b></td> <td>Brunner, Alf (1900-1990)</td> </tr> <tr> <td><b>Biographical history</b></td> <td>Alf Brunner was the grandson of Jacob Brunner. Alf had four brothers, Frank, John, Nick and Jake and three sisters, Barbara, Kath, and Lena who died at age 16 years. All of the siblings moved away and only Alf remained to farm the original homestead ... »</td> </tr> <tr> <td><b>Scope and content</b></td> <td>The fonds consists of images taken of the family and scenes around the family farm.</td> </tr> </table>	<b>Name of creator</b>	Brunner, Alf (1900-1990)	<b>Biographical history</b>	Alf Brunner was the grandson of Jacob Brunner. Alf had four brothers, Frank, John, Nick and Jake and three sisters, Barbara, Kath, and Lena who died at age 16 years. All of the siblings moved away and only Alf remained to farm the original homestead ... »	<b>Scope and content</b>	The fonds consists of images taken of the family and scenes around the family farm.		
<b>Name of creator</b>	Brunner, Alf (1900-1990)								
<b>Biographical history</b>	Alf Brunner was the grandson of Jacob Brunner. Alf had four brothers, Frank, John, Nick and Jake and three sisters, Barbara, Kath, and Lena who died at age 16 years. All of the siblings moved away and only Alf remained to farm the original homestead ... »								
<b>Scope and content</b>	The fonds consists of images taken of the family and scenes around the family farm.								
	Access points								
	<table border="1"> <tr> <td><b>Subject access points</b></td> <td>Agriculture</td> </tr> <tr> <td><b>Place access points</b></td> <td>Medicine Hat</td> </tr> <tr> <td><b>Name access points</b></td> <td>Brunner, Alf (Creator)</td> </tr> </table>	<b>Subject access points</b>	Agriculture	<b>Place access points</b>	Medicine Hat	<b>Name access points</b>	Brunner, Alf (Creator)		
<b>Subject access points</b>	Agriculture								
<b>Place access points</b>	Medicine Hat								
<b>Name access points</b>	Brunner, Alf (Creator)								
	<div> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Add new"/> <input type="button" value="Duplicate"/> <input type="button" value="Move"/> <input type="button" value="Link digital object"/> <input type="button" value="Import digital objects"/> <input type="button" value="Link physical storage"/> </div>								

Notice that the contextual information, such as the Repository name is a hyperlink in the context menu on the left-side of the screen. All the names are hyperlinks to authority records and all the access points are hyperlinks.

Play around with clicking on these links and seeing the web of relationships that has been created by the various entities: archival repository, authority records and archival description.



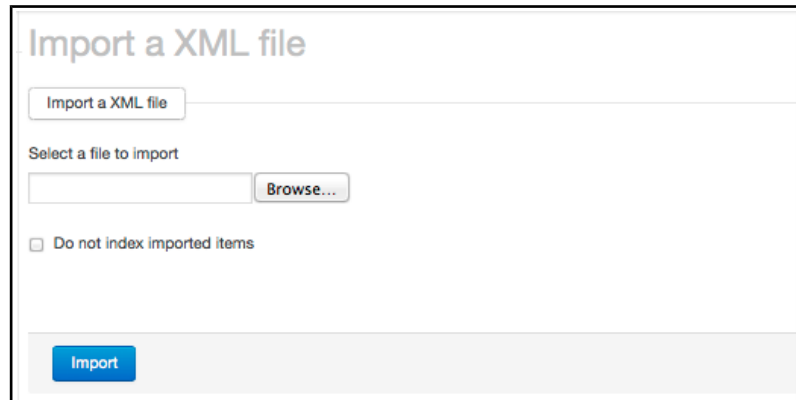
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**7.7** ICA-AtoM also provides the ability to **Import** an Encoded Archival Description (EAD) XML file. This means that you can exchange Archival descriptions from other databases or systems with ICA-AtoM using EAD XML.

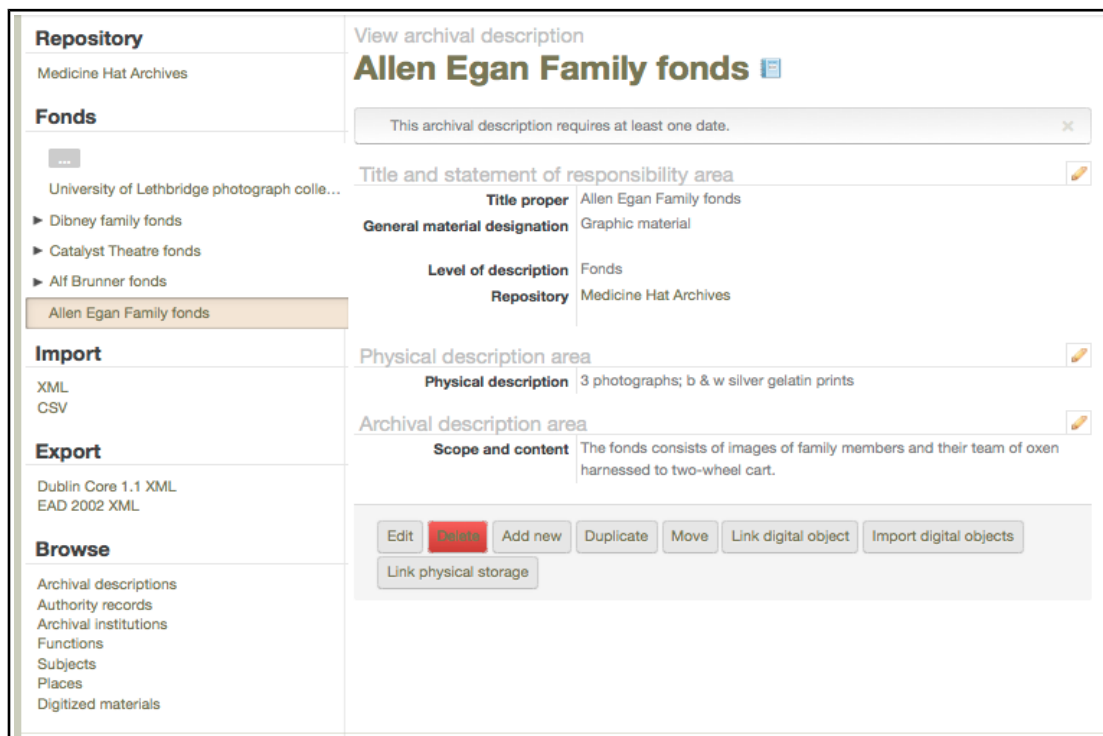
To **Import an Archival description** navigate to the top left-hand corner of the screen and **Click on Import**. From the drop-down list select **XML**.

**7.8** Click on the Browse button and select the XML file on your desktop entitled “**allen-egan-family-fonds;ead.xml**”.

Once the path appears in the data entry window, Click on the blue **Import** button.



Note: Warnings may be encountered, but simply ignore and Click on the **View Archival description** button. You should see an archival description for **Allen Egan Family fonds**. (See below)



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### Tutorial 8.0 Edit/Link/Import Digital materials/objects

In this tutorial you will learn how to **Edit and Link a single digital object** and **Import multiple digital objects**. The digital objects can be audio files, video files, image files and pdfs. The digital objects can be located at a URL, a remote server, or your desktop.

#### 8.0 Edit/ Link single digital object to Arthur Erickson fonds

**8.1** Navigate to the **Arthur Erickson fonds** by typing “*Arthur Erickson*” into the general search bar.

**8.2** Click on “Correspondence” from the list of 3 search results. This is a series-level archival description. ICA-AtoM takes you to the View archival description page for Correspondence.

The screenshot displays the ICA-AtoM interface. On the left is a context menu with sections: Repository (Canadian Architectural Archives), Creator(s) (Erickson, Arthur Charles, 1924-), Digital object (with a thumbnail of a letter), Fonds (with a sub-menu showing 'Arthur Erickson fonds' and 'Correspondence' highlighted), Import (XML, CSV), and Export. On the right is the 'View archival description' page for 'Correspondence'. It includes fields for Title proper (Correspondence), General material designation (Textual record), Level of description (Series), Repository (Canadian Architectural Archives), Dates of creation area (1950 - 1980 (Creation)), Physical description area (35 textual records; handwritten letters), and Archival description area (Name of creator: Erickson, Arthur Charles, 1924- (1924-2009); Scope and content: Handwritten correspondence between Arthur Erickson and his associates (professional and private). Many of the letters reference architectural projects and include small sketches.). At the bottom are buttons for Edit, Delete, Add new, Duplicate, Move, Link digital object, Import digital objects, and Link physical storage.

Notice in the context menu on the left-side of the screen that there is a thumbnail of a letter underneath the header Digital object. Notice that under the header Fonds, the Correspondence series is highlighted and has a black arrow in the closed position. The Arthur Erickson fonds is also shows with an arrow in the open position, this tells us that Correspondence is a child of the Arthur Erickson fonds.

**8.3** Double click on the thumbnail of the letter. ICA-AtoM will take you to the Item-level description for L01.

This is an item-level description with a digital object attached (JPG). If you look at the treeview in the context menu you will see that L01 is a child of the Correspondence series.

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**Repository**

Canadian Architectural Archives

**Creator(s)**

Erickson, Arthur Charles, 1924-

**Fonds**

◀ Show all

◀ Arthur Erickson fonds

▼ Correspondence

**L01**

**Import**

XML  
CSV

**Export**

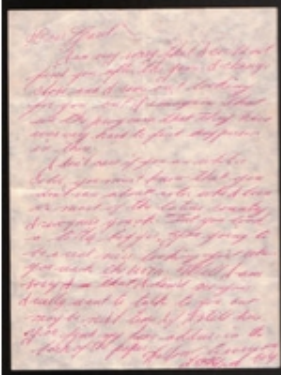
Dublin Core 1.1 XML  
EAD 2002 XML

**Browse**

Archival descriptions  
Authority records  
Archival institutions  
Functions  
Subjects  
Places  
Digitized materials

View archival description

**L01**



**Title and statement of responsibility area**

<b>Title proper</b>	L01
<b>Level of description</b>	Item
<b>Repository</b>	Canadian Architectural Archives

**Dates of creation area**

<b>Date(s)</b>	1968 (Creation)
----------------	-----------------

**Physical description area**

<b>Physical description</b>	1 textual record; 8.5" x 11.0" manilla paper with red ink
-----------------------------	---

**Archival description area**

<b>Name of creator</b>	Erickson, Arthur Charles, 1924- (1924-2009) <b>Biographical history</b> Canadian architect and urban planner.
<b>Scope and content</b>	Personal correspondence between Arthur Erickson and his biographer Nicholas Olsberg. The letter discusses the Fresno City Hall project and the role of futuristic design in architecture.

**Access points**

<b>Name access points</b>	Erickson, Arthur Charles, 1924- (Creator) Fresno City Hall (Subject)
---------------------------	---

**Digital object metadata**

<b>Filename</b>	Erickson-L01.JPG
<b>Media type</b>	Image
<b>Mime-type</b>	image/jpeg
<b>Filesize</b>	32.7 KiB
<b>Uploaded</b>	February 19, 2013 2:35 PM

[Edit](#)
[Delete](#)
[Add new](#)
[Duplicate](#)
[Move](#)
[Edit digital object](#)
[Import digital objects](#)

[Link physical storage](#)

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**8.4** Click on the **Edit digital object** button at the bottom of the screen. ICA-AtoM shows you the different versions of the digital object, which allows you to store a Master file at higher resolution and provide access to a Reference representation and a Thumbnail representation. You can also add a Rights restriction to this specific digital object. **For this exercise we are going to delete the existing digital object and then link to a new one on your desktop.**

Click on the red **Delete** button at the bottom of the screen. Confirm that you want to Delete the digital object linked to L01, by clicking on the red **Delete** button. **It is important to understand you are deleting the digital object NOT the archival description it is attached to.**

**8.5** ICA-AtoM takes you to the View archival description page for L01, but now there is no digital object (e.g., pink letter) attached. Click on the **Link digital object** button at the bottom of the screen.

**8.6** ICA-AtoM takes you to the Upload digital objects screen.

The screenshot shows the 'Upload digital objects' interface for item L01. On the left, there is a sidebar with 'Upload limit' (for Canadian Architectural Archives < 0.01 GB of Unlimited (Edit)) and a 'Browse' section listing categories: Archival descriptions, Authority records, Archival institutions, Functions, Subjects, Places, and Digitized materials. The main area is titled 'Upload digital objects' and 'Item - L01'. It contains two sections: 'Upload a digital object' with a 'File' input field and a 'Browse...' button, and 'Link to an external digital object' with a 'Url' input field containing 'http://'. At the bottom, there are 'Cancel' and 'Create' buttons.

Click on the **Browse** button and locate the file “Erickson-L02.JPG” and Click on the blue **Create** button. (There is also the option to link to an image at an external URL). ICA-AtoM takes you to the View archival description screen and you now have a new digital object attached to L01 item-level description.

(Note: for the purposes of this exercise the digital object filename was not changed to L01 prior to linking. You could easily change the Title proper to L02 so that it would match the digital object file name.)

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**8.7 To Import multiple digital objects** navigate to the Correspondence series. You can simply click on the title Correspondence in the context menu on the left-side of the screen. Click on the **Import digital objects** button at the bottom of the screen.

ICA-AtoM takes you to the **Import multiple digital objects** screen. Leave the title mask alone. Select “Item” as the level of description and Click “Select items”. Choose the files on your desktop “Erickson-L03.JPG – Erickson-L05.JPG”. Rename the Titles of the files: L03, L04, and L05. Click on the blue **Import** button.

**Upload limit**

for Canadian Architectural Archives < 0.01 GB of Unlimited (Edit)

**Browse**

- Archival descriptions
- Authority records
- Archival institutions
- Functions
- Subjects
- Places
- Digitized materials

Import multiple digital objects

### Series - Correspondence


Title

image %dd%

Level of description

Item


Digital objects



Title

image 01


Filename: Erickson-L04.JPG  
Filesize: 356487 bytes  
Delete



Title

image 02

Filename: Erickson-L05.JPG  
Filesize: 40377 bytes  
Delete



Title

image 03

Filename: Erickson-L03.JPG  
Filesize: 246196 bytes  
Delete

Select files

Cancel Import

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**8.8** ICA-AtoM takes you to the Correspondence series-level archival description screen. You will notice that there are more thumbnails added to the viewer on the left-side of the page under the heading Digital object. Click on the arrow next to Correspondence under the Fonds heading just below the thumbnails.

You should see a list of item-level titles: L01, L03, L04 and L05. If they are not in order you can drag and drop the titles into the right order – hover your cursor over the item-title in the treeview until you see a hand icon, then select and drag either above the other title or below it.

A single click on any of the item-level titles in the treeview and ICA-AtoM will take you to the View archival description screen. (See below for the L03 archival description page.)

**archives**  
SOCIETY OF ALBERTA

Search

Advanced search

**Repository**  
Canadian Architectural Archives

**Creator(s)**  
Erickson, Arthur Charles, 1924-

**Fonds**  
◀ Show all  
◀ Arthur Erickson fonds  
▼ Correspondence  
L01  
L03  
L04  
L05

**Import**  
XML  
CSV

**Export**  
Dublin Core 1.1 XML  
EAD 2002 XML

**Browse**  
Archival descriptions  
Authority records  
Archival institutions  
Functions  
Subjects  
Places  
Digitized materials

View archival description  
**L03**

This archival description requires at least one date.  
Physical description - This is a mandatory element.  
Scope and content - This is a mandatory element.

**Title and statement of responsibility area**

**Title proper** L03  
**Level of description** Item  
**Repository** Canadian Architectural Archives

**Archival description area**  
**Name of creator** Erickson, Arthur Charles, 1924- (1924-2009)

**Digital object metadata**

**Filename** Erickson-L03.JPG  
**Media type** Image  
**Mime-type** image/jpeg  
**Filesize** 240.4 KiB  
**Uploaded** February 20, 2013 11:15 AM

I have included a pdf file, a movie file, and audio files in the folder on your desktop, feel free to play around with attaching different types of media to an archival description.

## Tutorial 9.0 Add Terms

In this tutorial you will learn how to **create a hierarchical subject taxonomy**.

### 9.0 Go to Homepage – Add Term

**9.1** Navigate to the the Homepage and Click on the **Add** menu in the top left-hand corner. Select **Terms** from the drop-down list. ICA-AtoM takes you to the **Add new term** page. Unlike earlier in the tutorial when you created a subject term “on-the-fly” in the archival description template, you are now going to create a term with relationships, offering you more controlled vocabulary.

**9.2** In **Taxonomy** type *Sub*. Wait for the auto-complete to show **Subjects** and then select.

**9.3** In **Name** type *business and commerce*.

**9.4** In **Use for** type *business, commerce* (hit tab), type *doing business*.

**9.5** Click to open the **Relationships** area, enter the following data:

In **Add new narrow terms** type-

*Sole proprietorship* (hit tab)  
*Partnership* (hit tab)  
*Corporation* (hit tab)  
*Cooperative* (hit tab)

Click the blue **Create** button.

Add new term

**Untitled**

Taxonomy \*

Subjects

Name \*

business and commerce

Use for

Code

Scope note(s)

Source note(s)

Display note(s)

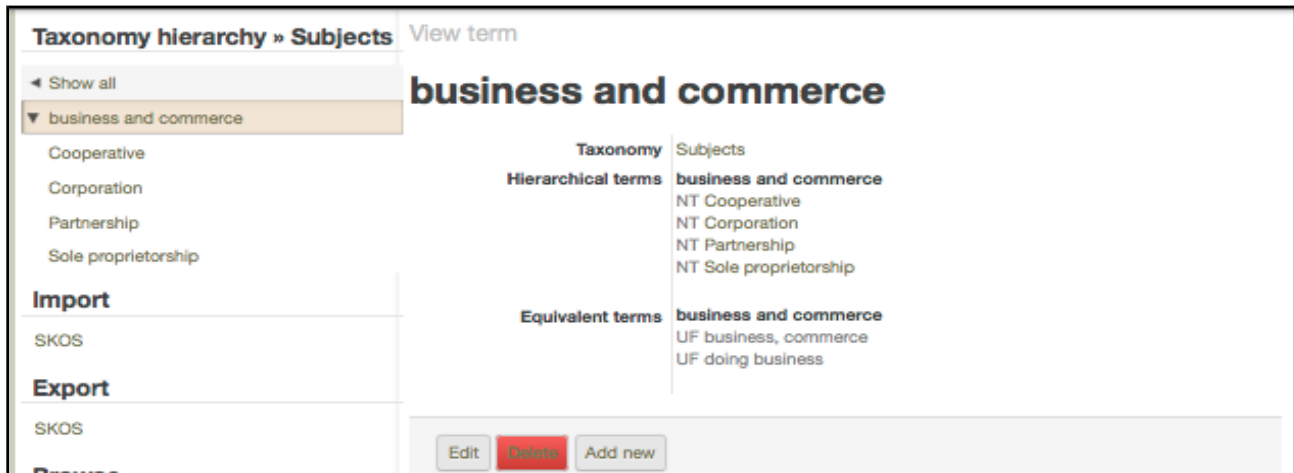
Relationships

Cancel Create



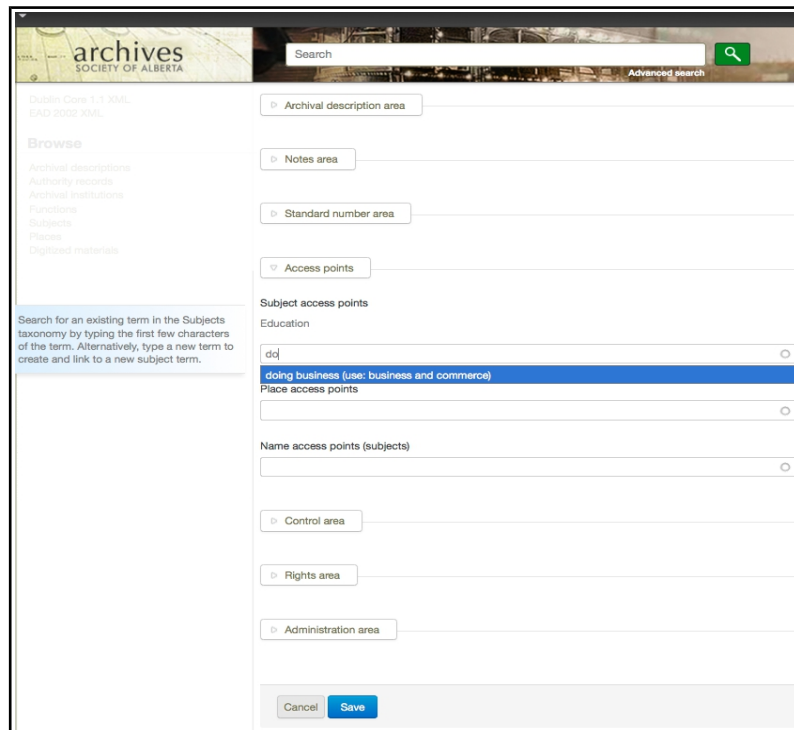
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### 9.6 Your saved taxonomy should look like this:



Notice that you are building a hierarchy of terms. You can now add any of these Subject terms (including the narrow terms) as Subject access points to any archival description. Also, the **Use for** terms allow you to control the quality of data input.

For example, if someone tries to enter “doing business” as a subject term – ICA-AtoM will prompt them to use: business, commerce. See below:



ICA-AtoM also provides an interface to Import and Export taxonomies as XML files using the Simple Knowledge Organization System (SKOS). This is addressed in detail in the User Manual.

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### Tutorial 10.0 Link Physical Storage

In this tutorial you will learn how to **Link Physical Storage to an archival description.**

#### 10.0 Go to University of Lethbridge photograph collection

**10.1** Navigate to the the University of Lethbridge photograph collection. You can locate it in the Browse list of Archival descriptions, or type “Lethbridge” into the general search bar and select it from the 2 search results.

**10.2** Once you are on the **View archival description** page for the **University of Lethbridge photograph collection**, Click on the **Link physical storage** button at the bottom of the page. ICA-AtoM will take you to the **Link physical storage** screen. You have the choice of selecting an existing container or creating a new container.

**Add the following data:**

In **Name** type – *ULPC*

In **Location** type – *Archives Cold Storage*

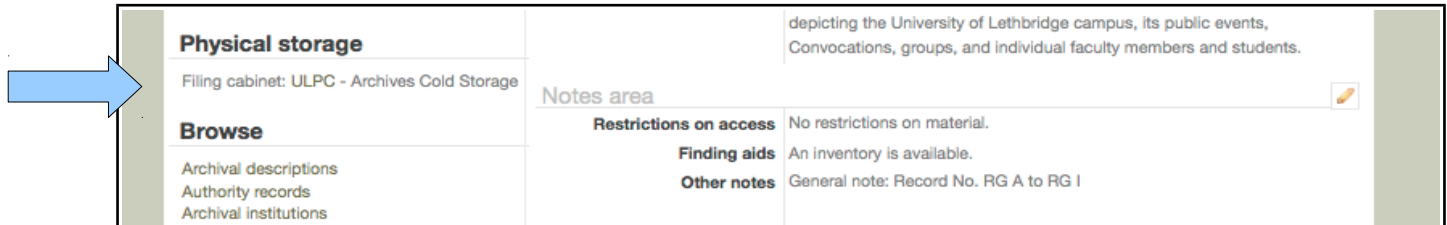
In **Type** select – *Filing cabinet*

Click on the blue **Save** button.

The screenshot shows a web form titled "Link physical storage" for the "University of Lethbridge photograph collection." At the top, there is a button that says "Add container links (duplicate links will be ignored)". Below this is a "Containers" section with a search bar. Underneath is another button that says "Or, create a new container". The form then has three input fields: "Name" with the value "ULPC", "Location" with the value "Archives Cold Storage", and "Type" with a dropdown menu showing "Filing cabinet". At the bottom of the form are two buttons: "Cancel" and "Save".

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In the **View archival description** page for **University of Lethbridge photograph collection**, you will now see on the left-side of the screen in the context menu area under the heading **Physical storage** – the information you just created “Filing cabinet: ULPC – Archives Cold Storage”.



As you saw earlier in today's training session, you can manage physical storage and link a container to every level of archival description.

The Title of the container is a hyperlink and if you Click on it, ICA-AtoM will take you to the **View physical storage** page, where you can **edit, delete and print the container**.

**10.3** If you need to delete a storage container, you must **navigate to the Manage menu** and **select Physical storage from the drop-down list**. In the browse list, **select the container hyperlink**. Click on the red **Delete** button. If a Physical storage container is associated with a number of collections, you need to be careful, as deleting it will cause cascading deletes.

## Congratulations!

You have completed all 10 Tutorials in the ICA-AtoM - ASA Training Manual.