PACSCL/CLIR Hidden Collections Project
MARAC talk regarding the Archivists' Toolkit

Today I am going to talk to you a little bit about the Archivists' Toolkit: what it is and how it works; and then I am going to talk a little about our project and how we are using the software.

[Slide] [3]

this is right from the AT website, so you don't need to take notes on this bit ... you can simple google archivists' toolkit and you will get this information.

[Slide]

For a little background, I am currently working on the PACSCL/CLIR "Hidden Collections" Processing project. Philadelphia Area Consortium of Special Collections library is a 35 member consortium which received a 500,000 dollar grant in 2009 from the Council on Library and Information Resources for their amazing Cataloging Hidden Special Collections and Archives program. If you have some time, you should check out their website to see all the incredible "hidden collections" projects going on around the country.

[Slide]

Our project goals are ambitious. We are one year and five months into the project and essentially have one year to go. Our mission is to ...

Thus far we have in fact processed 75 collections, updated 55 legacy finding aids and we do have the PACSCL finding aids site up and running

[Slide]

In order to accomplish these goals, we needed to be a bit on the creative side. The available time and money requires that we and our student processors are minimally processing all the collections. On top of that, we needed to be able to have an efficient method of creating DACS compliant EAD finding aids that are standard enough that they can come together in a shared finding aid repository. Moreover, we are hoping that the lessons learned and the methodology of the project continues after next October and that repository staff is able to continue building the shared finding aid site.

[Slide]

So before I even started on this project, PACSCL decided that the project would employ the Archivists' Toolkit. I had used (and loved) Archon before starting this job, but I soon grew to love AT too.

This software actually makes it possible for us to accomplish the project's goals (and believe me, when I started, I was very much uncertain that they could be accomplished!).

However, after completing data entry, AT actually creates DACS compliant EAD finding aids at the click of the button and you end up with either an html or a pdf file that can immediately be placed on your website.

I don't know if this sounds exciting to you or not, but for anyone who has actually coded EAD finding aids (my first job in archives) this is a miraculous and exhilarating moment. Even now, I find myself holding my breath until the beautiful html file appears on my desktop! Recently, my colleague Courtney Smerz and I taught an archives course for non-archivists, and there we had the absolute best response to the Archivists' Toolkit ever. One of our attendees, after seeing her data turn into an html finding aid, very dramatically said, "I think I need a cigarette!"

[Slide]

So now that you are hopefully sufficiently excited about the results of AT, I am going to show you, in the most incredibly brief way, what it looks like as you use it.

The first thing you do is enter collection level information. You determine your level by selecting it from a drop-down menu. We are adding collection level information so I selected "collection".   In order to create a collection level record, you are required to add a collection title, collection dates, language of materials in the collection, extent of the collection, and a resource identifier (essentially your accession number or collection number)

In order to add a series or file within your collection, you click "add child" in order to create a record one level below your current record.

[Slide]

Take notice of this screen … you use the same data entry screen regardless of whether you are adding a series, a subseries, a file or an item. On this slide, I have added two series and am in the midst of adding a third. You can see that I have selected series as the level. If you add multiple series within the collection you can click "add sibling" because you are maintaining the same level within the finding aid.

[Slide]

On the left navigation bar, you can see that the hierarchy of the intellectual arrangement of the collection is building. I love this because you can tell pretty quickly if you have made mistakes. Also important to note is that the left navigation bar is purely intellectual arrangement—you only link to a physical location by

adding the "instance" or the box and folder numbers. I am not going to lie. When I started working with AT, I found a lot of it to be extremely NON intuitive. As I worked with the database, however, I realized that most of these really non-intuitive tasks were developed with great intention. This complete separation of intellectual and physical arrangement allows you to keep like material together regardless of how the material is housed. AT also created a really amazing way to quickly add data which is called Rapid Data Entry and allows you to add intellectual and physical information at the same time.

On this screen, I have added files to the series and attached a box and folder number to it. The third series contains subseries and files.   You can add as many levels as you choose and you can attach "instances" to all levels.

[Slide]

Adding name and subject authorities is really easy in AT ... you click on the tab "names and subjects", select either names or subjects, and then essentially you fill out a form and AT generates properly formatted authorities for you. You can add names and subject at the collection, series, subseries, file or item level, but we generally only add them to the collection level.

[Slide]

Adding notes is also really easy. First you click on the tab Notes Etc. and Deaccessions, you select the type of note you want to add from a drop-down menu, and a box that looks like this pops up with the title of the note already entered. You type in your note, click ok and the note is saved. You can see on this slide that I added several other notes in addition to the one I am currently working on. Again, you can add notes to any level in the collection, but we generally only add at the collection and series level.

[Slide]

The last step is filling out the Finding Aid Data screen.   This screen allows you to give your finding aid a title, record the date that the finding aid was completed and who created the finding aid. If you add the series in the appropriate box, when you create a marc record that information is pulled from that field.

So once all your info is included, you can export xml or you can generate a report as either an html or pdf.

[Slide]
This is what an xml record looks like—it is really the raw data that gets run through a stylesheet and displays your finding aid beautifully on the web. If this scares you, don't worry! One of the many beautiful things about AT is that it makes it so you

don't ever have to look at this. It is important if you are going to customize your own style sheet.

[Slide]

As I said earlier, you can use AT right out of the box … AT has a stylesheet that is automatically used when you generate an html finding aid. However, if you have techy folk (and we are working with the University of Pennsylvania, so we do!), you can customize your finding aids with a specially created stylesheet. This is what ours looks like.

[Slide]

AT also has a standard format that is automatically used when you generate a pdf finding aid. Penn has customized ours and this is what ours looks like, but it is based largely on the one that is automatically generated by AT.

[Slide]

Things are much easier when you are not working with 23 repositories, and very little is simple with my job. Due to concerns Penn had regarding security of a single cross-repository AT database, each repository hosts their own separate AT database. When a collection is finished, the repository generates an xml record, places that xml record into a web folder, and Penn harvests the record, runs it through its stylesheet, and the next day it appears on the PACSCL finding aid site.

[Slide]

Which looks like this: We are super excited about this because you can search across repositories via the search box or through the faceted searching on the right side. Or you can search for collections only within one repository.

[Slide]

As you might remember from the one of my first slides, we are processing collections and updating legacy finding aids … I actually think that the legacy finding aid part of the project is harder than the processing part. Trying to force existing finding aids into the Archivists' Toolkit is not an easy task, and I personally think, about 6 months into the part of the project, that the majority of these collections should probably not be placed into AT without first being re-processed. Because of space constraints and coordination with 23 repositories, our AT cataloger works in our office at Penn and does not work with the collection at all.

[Slide]

[Slide]

A lot of times the electronic finding aids are formatted in a tricky enough way that re-keying is still the best option. However, if our electronic finding aids have any kind of structure, we do some techy magic which was developed by the project's technology committee. It is still time consuming, but when it is applicable, it saves an enormous amount of time.

[Slide]

We have worked with AT pretty much every work day for the past year. As a result, we have some loves and a few hates!

We love AT primarily because it means that we can do the project.
Without the standardized structure of AT, it would be impossible to import home-grown finding aids into a shared centralized finding aid site.

It also allows our student processors, who are given roughly 2 hours per linear foot to process collections the ability to really work on the collections rather than worry about coding EAD.

[3 more points]

[Slide]

So what don't we like about AT ... probably our absolute primary pet peeve is that there is no spell check within the system, and as a result, Courtney and I spend a lot of time editing finding aids. This does not have to be a crisis: we cut and paste the html file into a word document and run spell check there. It is a clunky work-around, but it does result in finding aids without spelling errors.

AT is not intuitive ... the terminology is heavy on database language and it does not make a lot of sense to your typical history-loving liberal arts major turned archivist. However, once you use the database, it does not take long to get past the initial confusion. We created an AT manual for our processors (available on our website), and they generally use it intently for about 2 weeks and then never use it again.

If you make mistakes with instances, they are not very efficiently fixed. Again, it is not a crisis, but I always heave a great sigh when I see that I need to go in and fix a whole box worth of folders.

There is no user interface—this means you have to have a website to make the material accessible. And you have to either use the supplied stylesheet (which I think is pretty good) or have the technology staff to help you customize one. In the past year, I have learned that technology staff is a rare commodity and one to be valued above rubies. You also need to be techy enough to get it on your website.

Most people can do that, but it is pretty daunting for those who don't have that experience.

I also don't love the digital object component of AT ... there is nothing intuitive about it and even after figuring it out, I really have struggled with it.

[Slide]

So probably, most of you have heard the news that Archon and Archivists' Toolkit will be merging ... and having worked with both, I think this is absolutely wonderful.

[Slide]

The plan is for the new system Archives Space to combine the best of both software's into one.

[Slide]

We hope that the new system will have Archon's great user interface and their wonderfully easy and attractive system of dealing with digital objects. And from AT, we hope that the flexibility of adding intellectual and physical components remains. Moreover, we hope that the hierarchical structure that is essentially at the core of all archival practices is maintained.

[Slide]

In case you are interested in looking at our AT manual or instructions for installing AT and connecting to a database, you can see our project website at clir.pacscl.org. If you want to check out the shared PACSCL Finding Aid site, you can go to findingaids.pacscl. org

Thanks so much!