ARCHIVES MANUAL

Instructions on how to use AtoM to create Archival Descriptions

AtoM
Administrators Section:

Creating users:
To create users you need to be an administrator in AtoM. At present only Tony, Mary, David Annable and Artefactual support are administrators. An administrator will need to change your user group to Administrator.

When you log in as an administrator, AtoM will look as follows:

Click on settings: Choose users from the drop down menu.
From here you can add users, delete users or change them to inactive or edit details on a user. To edit a user, click on their name. To add a user, choose add new.

User roles are as follows:

**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.

Contributor front page looks like this:
By default an editor can search, browse, create, edit/update, view draft, delete and export descriptions and edit controlled vocabulary terms. An editor can also change the publication status of an information object. An editor can access the reference and master digital object. An editor is also the only user group besides the administrator who can access the accessions module.

Editor Front page looks like this:
**TRANSLATOR:**

A translator can search and browse published descriptions and can translate user interface elements and database content.

A translator should be able to view draft descriptions, but not edit them.

**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.

Administrators can also create new user roles, set granular permissions for that role, and then assign or unassign users from the new role. For more information on creating a new user role, see Add a new group.

Administrator Front page looks like this:
When you click on the user page in administrator you can change passwords, user names, emails, and user groups.
Editing static pages (home and about):

Administrators can edit the home and about pages to reflect their institution. They cannot do any theming (for example change the colour scheme). Only systems administrators (David and Artefactual) can do that. Administrators can change the wording on the front and about pages and add a picture. To do this you may need to use some html. The html needed is really very basic.

To find some html functions go here: https://www.w3schools.com/html/default.asp

The following books are very good:


This one is probably more than everything you need to know and is very short!

Basic functions you will need to know are:

<p> </p> = paragraph

<h1></h1> = heading one (largest and most important heading)

<h6></h6> = heading six (smallest and least important heading)
<a href="https://www.w3schools.com">This is a link to another web site</a>

This is an image. `<img src="w3schools.jpg" alt="W3Schools.com" width="104" height="142">` This is an image. `img src` points to the image file, `alt` is alternate text (for visually impaired) `width="104" height="142` is width and height of image in pixels.

**Settings:**
Administrators can change settings it need be, however you likely don't need to do this as most of the settings are already set and you should do it only if you understand the instructions in the user manual [here](#)
Editors:

Creating an accession record: (Editors and Administrators only)
When you first start working on a fonds, the first step is to create an accession record in ICAAtom.

Here is a definition of accession: ACCESSION – a. (v.) to accession or accessioning - The act and procedures involved in a transfer of legal title and the taking of records into the physical custody of an archives. b. (n.) The process by which a fonds, collection or item enters the holdings of an archives.

c. (n.) Fonds, collection or item acquired at one time from single source.

In short each collection or fonds requires an accession record.

There is only 1 accession record per Fonds. (Only 1 accession record per entire collection, as in the entire Bishop Renison collection.) There is also 1 fonds level archival description per fonds.

Click Add on the top left corner. A drop down menu will appear. Choose accession records.
The accession number is a number created by ICAaatom for every accession record.

Date of Acquisition is the date (to the best of your knowledge) that an accession or fonds was acquired. For Example 1999-07-26

Immediate source of acquisition is the way in which the archives acquired a particular fonds. For example:

“Transferred from George Everett Bristol Renison’s estate through his lawyers Gowling Strathy and Henderson”

The location is where the fonds are currently being held. For example: Renison University College Archives -- Bishop Renison Fonds.

To enter donor information click on title “Donor/Transferring body area.” The donor is the person who donated or transferred the fonds to Renison. For Example “Renison, George Everett Bristol”
**Acquisition type:** Drop down menu. Choose acquisition type for example “gift” or “purchase”

**Resource type:** Drop down menu (choose private or public)

**Title:** For example :"Bishop Robert John Renison fonds"

**Creator:** Person responsible for content. A drop down menu. Choose from a number of choices. For example: Renison, Robert John, 1875-1957

**Archival/Custodial history:** History of where the fonds were and who owned the fonds since they left the custody of the creator. (Establishes authenticity of archives.) For example write : Willed to Renison University College in c/o Gail Cuthbert Brandt July 1999 from the estate of George Everett Bristol Renison. Willed to George Everett Bristol Renison by his father Bishop Robert John Renison. Willed to George Everett Bristol Renison from his father Bishop Robert John Renison.
**Appraisal, destruction and scheduling:** Use appraisal only if there is an appraisal of the materials available. Destruction and scheduling are only used for items that are received and destroyed on a set schedule. This is more applicable to records than to personal archives. Do not use for personal archives.

**Physical condition:** Describe physical state of archives: For example: Fair. Show signs of acidification.

**Received extent units:** Number of units received and measurements. For example: 200 photographs. 3 linear m. of textual documents.

**Edit Draft records and Update publication status:**

Only editors and administrators can Edit and publish draft records. Edit records as follows: records

Will appear like this in editor mode. Click on Edit to Edit or delete to delete.

To publish a record or to edit the rights, click on more and choose the action you want.
To update publication status click on publication status and change publication status to published. Click update. This makes the records visible to everyone. If you want to update all records underneath a record choose update descendants.

**Rights:**

**Basis:** Choose appropriate basis.

**Copyright:** We do/ do not have rights to publish something because of copyright restrictions. Usually 50 years after the death of the last surviving author or 50 years after publication whichever is last.

**License:** Item is something the library has a license to (paid databases). For example the Globe and Mail database. Licenses trump copyright. For example, we cannot provide access to anything through the Globe and Mail Database for non-University of Waterloo people. However if we want to publish a Globe and Mail article we have in paper in the archives that is in the public domain, we can do that.
Statute: Not often relevant to archives. More relevant to records. Some information we cannot publish because it violates certain statutes and or we must keep it available for freedom of information.

Policy: Institutional Policy. For example the policy of the privacy office at the University of Waterloo is to not publish yearbooks publically. We may choose for example to only publish official photographs and keep students off limits for a certain number of years before publishing photographs.

Grant: The donor grants us permission to publish something. All of the above rights supercede this. For example many photographs and items in the College files are still under copyright and or are considered to violate privacy laws. Just because the college grants us permission to publish a photo doesn’t mean the subject of the photograph grants us permission or the copyright holder grants us permission.

Fill in the other fields only as you know the answer. For example if you don’t know if something is under copyright choose unknown.
Contributor:

Logging in:
To access ICAatom click on log in using your email and password. If you are logged in the top right corner will show your user name. If you do not have a user name and password an administrator can create one for you:

Your page after you log in will look like this:
Archival Descriptions:

This is where we put the bibliographic descriptions of the materials in the archives. Start at the most general level and go down. This means create a description for the entire fonds first, then the “subfonds” and “file” and “item”. The description for the fonds should generally be in more detail and information should not be repeated in lower level records, that is already in higher level records. You can duplicate records to save time. Remember always to change the information in the new record to match the new item.

Title and statement of Responsibility area:

**Title proper:** Here put the title of the work being described. Take the title from prescribed sources of information such as the byline of a Newspaper article or Title page. If there is no such title provided supply a title using the name of the creator. Make sure you change the title for a new item if you use the duplicate feature. Do not put supplied title in square brackets. For example:

Bishop Robert John Renison Fonds

A Grammar of the Cree Language

**General material designation:** Choose from drop down menu which most closely relates to the item being described. For example Textual Record.

**Parallel titles:** Use for parallel titles. Usually titles in another language. Not often used.

**Other title information:** Use for continuation of title (i.e. after : ) most likely to be used for published works (newspaper articles, books) only.

**Statement of responsibility:** Chief creator of archival materials. Use only if the name of the author is printed directly on the item being described. Write exactly as written on the item:

For example for a newspaper article by “the Most Reverend R.J. Renison” the statement of responsibility will be /by The Most Reverend R.J. Renison

**Title notes:** Choose from the drop down menu. Source of title proper will be the most commonly used note. For example for an item without a title choose “source of title proper” and write “source of title proper is from provenance.” (creator) If there is a title supplied on the title page or byline or other chief source of information write the note :“source of title proper is from chief source of information"

If you have too many notes and need to delete a note, click the X to the side of the note.

**Level of description:** Refers to the Child/parent level being described. Fonds is parent level to sous-fonds. Sous fonds is parent to series. Series is parent to file. File is parent to item. If you are describing the fonds choose fonds. If you are describing a file folder, choose file or subfile if divided into subfiles.

Repository: Choose Renison University College Archives. Do NOT create a new repository. If you accidently create a new repository, stop and ask an administrator to help.

Identifier (unique number): Use number in numbering system created for individual fonds for files in collection. For example “REN BRC 1.711”

**Edition area** (Not frequently used) only use for published items.

**Edition statement:** *(Waterloo, Ont. : Renison University College, 2008)*
Statement of responsibility relating to the edition (/Gail Cuthbert Brandt)

Class of Materials specific details area (Not frequently used) Only used for stamps, maps or architectural drawings

Dates of Creation

Refers to creator of materials in fonds. There must be at least one creator. Choose from drop down menu:

For Bishop Renison fonds record creation dates are as follows: (change date as needed for individual items). For lower level (below fonds) only creation dates specific for the level.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role/event</th>
<th>Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Role/event</td>
<td>Date(s)</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>------------</td>
<td>-----------</td>
</tr>
<tr>
<td>(only if applicable)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Physical description Area:**

**Physical description:** Physical description of item being described. For example:

- 3 linear meters of textual records
- 3000 photographs

**Archival Description Area:**

There are two sections in this area: Custodial history (To establish authenticity) and Scope and Content. All other sections are filled in from information You put into the record earlier.

**For custodial history:** write a short description of where the archival material lived since the creator died. For example: Willed to Renison University College in c/o Gail Cuthbert Brandt July 1999 from the estate of George Everett Bristol Renison. Willed to George Everett Bristol Renison by his father Bishop Robert John Renison. This is to establish authenticity, that is to say that the files were really created by the purported author. You only need one per fonds unless something has a different custodial history. (Came to archives in a separate way.)

**Scope and content:** describes the intellectual content of the item being described. Make sure that you change to scope and content to reflect the item being described.

For example (fonds): Letters, newspaper articles, sermons, photographs written, written about or created by Bishop Robert John Renison 1875-1957.

(Item): An official (colour) photograph taken of the Most Reverend Robert John Renison by Kennedy in 1952 on the occasion of his installation as Metropolitan of Ontario.

**Notes area:**

Put any relevant notes. Examples of frequently needed notes are:
**Physical condition** “Fair to poor. Many items show evidence of acid damage.” (Use only when the condition materially affects the legibility of an item, meaning if the condition makes an item more difficult to read.

**Immediate source of acquisition** “Estate of George Everett Bristol Renison” (Use only for lower levels if different from higher levels)

**Finding aids** (if a finding aid is available)

**Location of Originals:** Tony likes to have to reminders to people of existence of archives.

Florence Li Tim-Oi Memorial Archives. Lusi Wong library first floor Academic Building, Renison University College

**Control Area:**

**Description Identifier:** Same as Identifier in last field of statement of responsibility

**Institution Identifier:** is "Renison University College Archives"

**Rules or conventions:** is "RAD - Rules for Archival Description, Rev. version,, Ottawa: Bureau of Canadian Archivists, 2008."

**Status:** Leave at draft

**Level of detail:** is "partial"

**Dates of creation, revision and deletion:** Write dates of creation and any changes to the item. Write As “Creation: MM.DD.YYYY and/or “Revised: MM.DD.YYYY”

**Do not use the following areas: (for administrators only)**

**Administration area.**
Authority Records:

Every person, corporation or family being described needs an authority record.

Identity Area:

**Type of entity:** Choose person, family or corporation

**Authorized form of name:** the form of name you have chosen to use for each entity. Check for rules at Chapter 22: *Canadian Council of Archives., & Canadian Committee on Archival Description. (1990). Rules for archival description. Ottawa, Ont.: Canadian Council of Archives.*

**Parallel form of name:** for other languages. For example the parallel form of Florence Li Tim-Oi is 李添嬡

**Standardized form of name:** as applicable, should there be one. For Example Library of Congress Authorities.

**Other Formats of name:** Any other forms that may be used.
Description area: (Where description rubber hits the description road, so to speak):

Dates of existence: When entity existed. Birth and death dates for a person.

History: As detailed as a history of corporate body or family, or biography for a person as you can write with your research, about 1-3 pages. (Pro-tip: write in word and then transfer to Atom when you are finished.)

Places: List of places entity is associated with (lived, is based, travelled to, was educated etc. Use Rules for Archival Description Chapter 23 for proper format) For example “Waterloo (Ont.)

Legal status: if applicable. Mostly used for corporations. For example: "created through "the University of Waterloo Act", 1959. A new "Act Respecting the University of Waterloo" was passed 10 May 1972.

Functions, occupations or activities: what entity did/ does. For example for Florence Li Tim-Oi use Anglican Deaconess
Anglican Priest
**Mandates/ sources of authority:** Who gives them the authority to do this (if applicable). For Example for Li Tim-Oi use “Diocese of Hong Kong and Macau” for University of Waterloo use “the University of Waterloo Act”, 1972.

**Internal Structures/ Geneology:** For families or corporations

**General Context:** Historical and social context in which the entity existed.

**Relationships:** establish relationships between different entities. For example:

<table>
<thead>
<tr>
<th>Entity</th>
<th>Type</th>
<th>Relationship</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waterloo College</td>
<td>temporal</td>
<td>is the predecessor of University of Waterloo</td>
<td>1957-1960</td>
<td>During the late 1950s, plans were in place to create a non denominational Affialiated Faculties of Waterloo College. In the end Waterloo College backed out of this agreement resulting in the creation of the non denominational University of Waterloo and in the creation of Waterloo Lutheran University.</td>
</tr>
<tr>
<td>Renison University College</td>
<td>associative</td>
<td>is the associate of University of Waterloo</td>
<td>2008</td>
<td>During the late 1950's, when the University of Waterloo was being created, Renison College was one of two denomination colleges to become an affiliated or federated college of the University of Waterloo. In July 2008, due to it’s evolving academic nature and status, Renison College became Renison University College.</td>
</tr>
<tr>
<td>Renison College</td>
<td>associative</td>
<td>is the associate of University of Waterloo</td>
<td>1959-2008</td>
<td>During the late 1950's, when the University of Waterloo was created, Renison College was one of two already existing denominational colleges to enter into an affiliated (Renison) or Federated (St. Jerome's) agreement with the University of Waterloo</td>
</tr>
<tr>
<td>Renison, Colonel George Everett Bristol</td>
<td>associative</td>
<td>is the associate of University of Waterloo</td>
<td></td>
<td>Colonel George Everett Renison received an honorary degree from the University of Waterloo</td>
</tr>
</tbody>
</table>

**Control Area:**
**Authority record identifier:** A unique number created for each authority record.

**Institutional identifier:** “Renison University College”

**Rules and or Conventions used:** use (as printed)


**Status:** Draft

**Level or detail:** partial until finished

**Dates of creation, revision or deletion:** Write dates of creation and any changes to the item. Write As “Creation: MM.DD.YYYY”

**Languages and Scripts:** as used in the archival materials

**Sources:** Any sources used for historical research. Use APA style guide.
Linking to Globe and Mail articles:
1. Save archival description
2. Choose more and link to digital object
3. Choose find and use resources and “news sources”
4. Choose “Canada”
5. Choose “Globe and Mail – Canada’s Heritage from 1844”
6. Search by title
7. Click on citation/abstract
8. Scroll down to “Document url” and highlight.
9. Copy url (cntl-C) into space for url (cntl-V)

Choose more and link to digital object
Choose find and use resources and “news sources”
Choose Canada

Choose Globe and Mail:
Search by title in Proquest. Choose article.

Choose citation/abstract:

Scroll down to “Document URL”. Select url only with mouse and copy with ctrl+c
You should now have a link that goes directly to the article on campus and asks the user to login off campus.
**Adding Digital Objects:**

Add only Jpeg files of 150 ppi or lower resolution or pdf files. Do not use Tiff in public catalogue. PDF files should be joined in one large file. (as opposed to one file per page. Use Acrobat Pro to create and combine PDFs.

On Bottom Menu select More. From more menu select Link digital object. To link to an object place the url in the section “link to an external digital object”.

To upload a digital object, choose upload digital object, choose file and create: