Recordkeeping for Good Governance Toolkit

PARBICA
Pacific Regional Branch
Branche Régionale pour le Pacifique

User Guide for Guideline 25: Implementing Access to Memory (AtoM) in the Pacific

Acknowledgements

The Implementing AtoM in the Pacific guideline of the PARBICA Recordkeeping for Good Governance Toolkit was kindly supported by the UNESCO Memory of the World Committee for Asia and the Pacific.

Authors: Carly Lenz, DigiPres Collective
Jan Hutař, DigiPres Collective
Joshua Ng, DigiPres Collective
Ross Spencer, DigiPres Collective

Thanks to the following people who provided advice on the guidelines, peer-reviewed the guidelines and provided editing support:

Katherine C'Ailceta, Archives New Zealand
Natalie Vaha'akolo, Archives New Zealand

Special thanks to the PARBICA Bureau.

The original version of this guideline was prepared by the Pacific Regional Branch of the International Council on Archives (PARBICA) for use by countries around the Pacific.

We hope that you will use and adapt this guideline to suit your own organisation's needs and arrangements. In your use of this guideline, PARBICA only asks for attribution and for you to please let us know how you have used it – this helps us to measure the impact of the Toolkit.

If you have any questions about, or feedback on, these guidelines, please contact PARBICA at parbica.treasurer@naa.gov.au or via any of the contacts on the website: https://www.parbica.org.

Contents

Introduction

Users arriving at this document are expected to already have had some briefing with regard to using AtoM in their institution. This guide will walk you through the fundamentals of accessing the system and getting up and running with AtoM's user interface for archival description and the development of finding aids and maintenance of other information AtoM is capable of storing.

Dedication to the Association of Manitoba Archives

This guideline modifies guidelines original developed by the Association for Manitoba Archives (AMA). We want to acknowledge AMA for allowing us to use their guideline as well as the communication with Christopher Zaste and Andrew Morrison, enabling the guide's reuse.

STEP 1 - General Information

1.1 Preliminary information

- You will need to refer to the following information in the preliminary steps in the remainder of section 1.

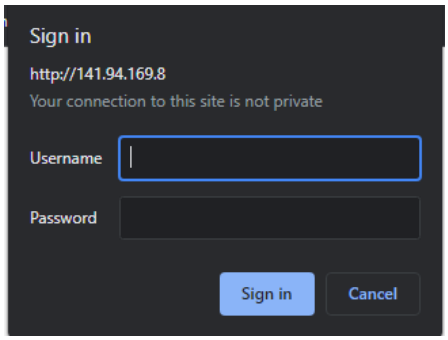
CONTACT_INFORMATION	collective@digipres.tech
ATOM_WEBSITE	**PARBICA AtoM Test Instance** http://141.94.169.8/index.php/
HTTP_LOGIN	• username: parbica • password: passw0rd
ATOM_LOGIN	• Default password: passw0rd

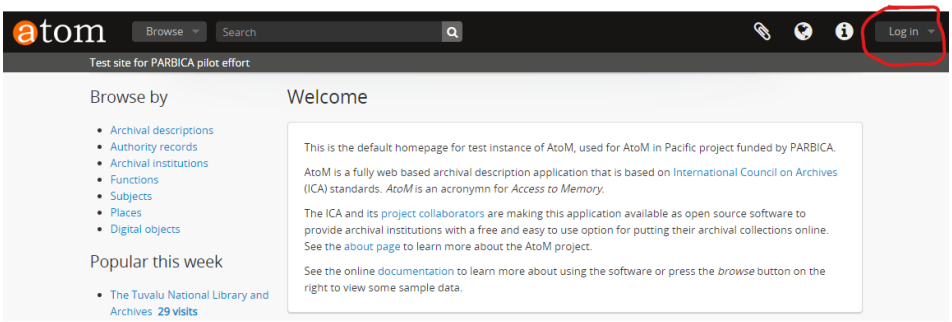
1.2 Setting-up an Account in PARBICA AtoM

- If you require an account in PARBICA AtoM, send an email to the address in the CONTACT_INFORMATION above and provide the following information:
  - The repository/archival institution to which your account should be linked

1.3 Logging into PARBICA AtoM

- Go to ATOM_WEBSITE
- Given a prompt for authentication details that looks like below, make use of the HTTP_LOGIN for the username and password.
- Click **Log in** (right-hand corner of the screen)



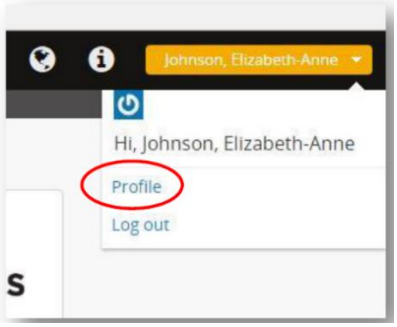


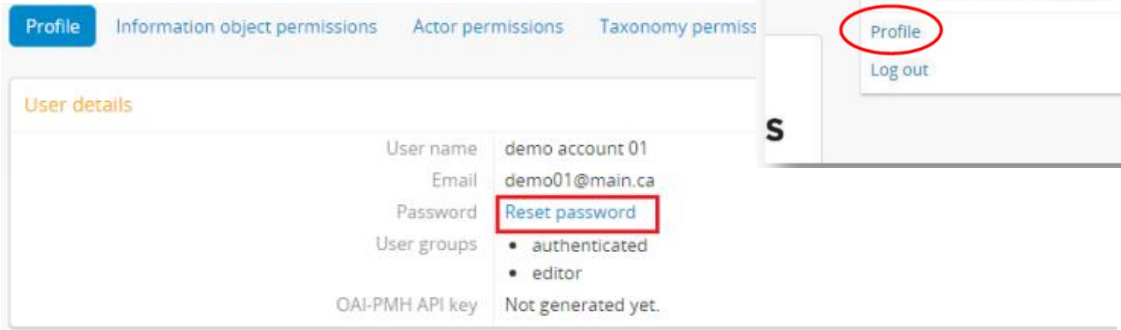
- Enter your Email and password. Click the **Log in** button.

Your default password is listed above in the preliminary information section (1.1).
Please change your password upon first login.

1.4 Changing Your Password

- Click on your name and then choose **Profile**.
- Click **Reset password**





- Enter and confirm your new password when prompted.

1.5 Forgot Your Password?

If you have forgotten your password, use the e-mail details in 1.1 and request a password reset. You will receive a temporary password. To change the temporary password, follow the steps in 1.2 Changing Your Password.

1.6 De-activating an Account in PARBICA AtoM

If you no longer require an individual account (e.g., if an employee at your institution has left and no longer requires access to PARBICA AtoM), contact the email address in 1.1 to de-activate their account to ensure that they can no longer access or edit your records.

1.7 Saving Content in PARBICA AtoM

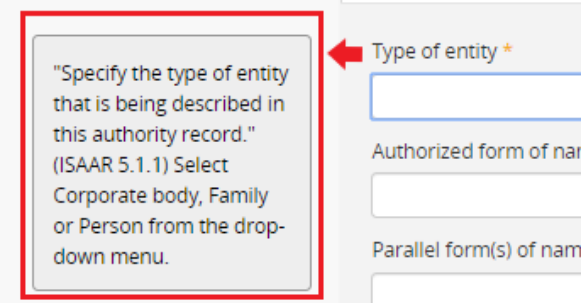
When creating or editing content in PARBICA AtoM (e.g., entering descriptions or authority records), you should save your description habitually to prevent the loss of significant information if the site crashes while you are working on your content. For longer content, we recommend you save the content locally (e.g., in a Word file on your desktop) to ensure your description is not lost if a system failure in PARBICA AtoM prevents you from saving a description.

2 STEP 2 - Adding/Editing Authority Records

An authority record documents a **person**, **family**, or **corporate body**, including their authorized form of name, biographical or administrative history, dates of birth and death, etc. When creating an authority record, certain fields should be consistently used in PARBICA AtoM. The following fields are mandatory for all authority records:

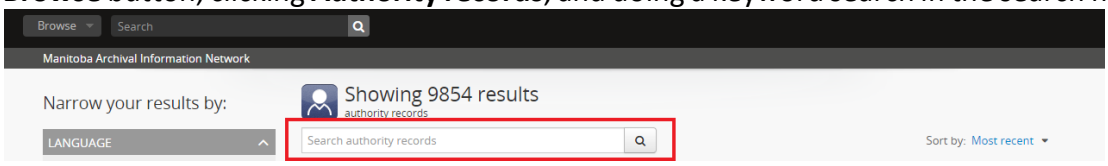
- Type of entity
- Authorized form of name
- Dates of existence
- History
- Maintaining repository

This section provides information on how to format and populate these fields, and other optional fields. Some lesser used fields are not discussed in this guide. However, more information on these fields can be obtained by clicking in the field of interest.



When you click in a given field, a note will appear to the left of the field, providing details on what information should be entered into the field, as well as a reference to the section of the International Standard Archival Authority Record for Corporate Bodies, Persons and Families, or ISAAR(CPF) for more information.

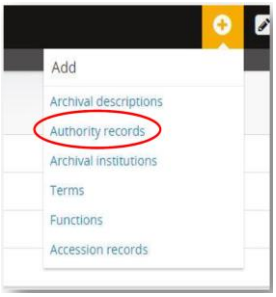
Prior to creating an authority record, search your ATOM INSTANCE to ensure that there is not an existing authority record for the entity you are describing. You can do this by clicking on the **Browse** button, clicking **Authority records**, and doing a keyword search in the search field.



If an authority record already exists for your entity, you should merge your description with the existing authority record, so that users interested in the creator can access all records related to the creator through a single authority. To do so, contact the institution that created the authority record and discuss potential options, including linking to their authority record, or merging both authorities to create a more detailed record. The Maintaining repository can

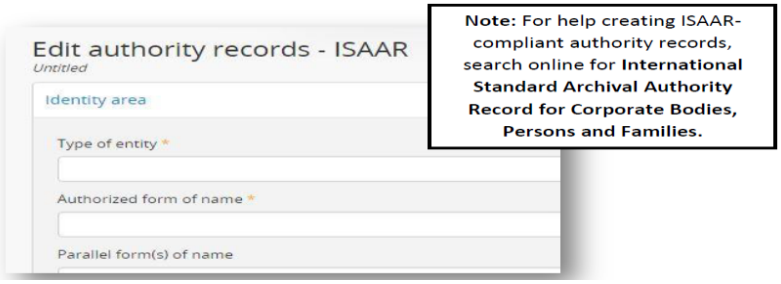
be found in the **maintained by** field in the **Control area** section (see 2.4 Control Area). If the authority record does not already exist, follow the steps below.

- Click on the **Add** button in the top toolbar and select **Authority records**.

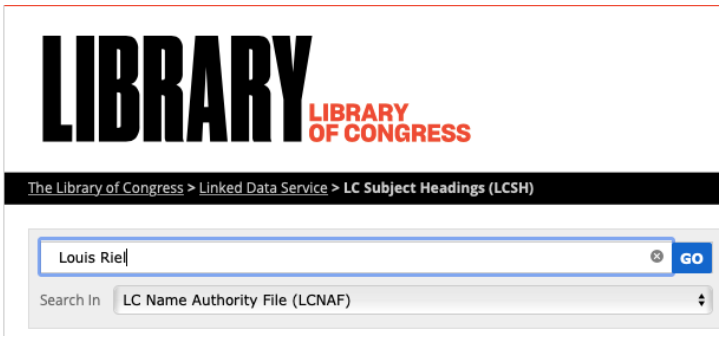


2.1 Identity Area

- Click **Identity Area**



- Select the **Type of Entity** that applies to your authority from the drop-down menu.
- Enter the entity's **Authorized form of name** in the appropriate format. If a Library of Congress authority exists for your authority record, use the same format for the **Authorized form of name** as the Library of Congress standard. To search for a Library of Congress authority, go to http://id.loc.gov/authorities/subjects.html and select LC Name Authority File (LCNAF) in the dropdown menu. Enter your authority name in the search field and click **Go**.

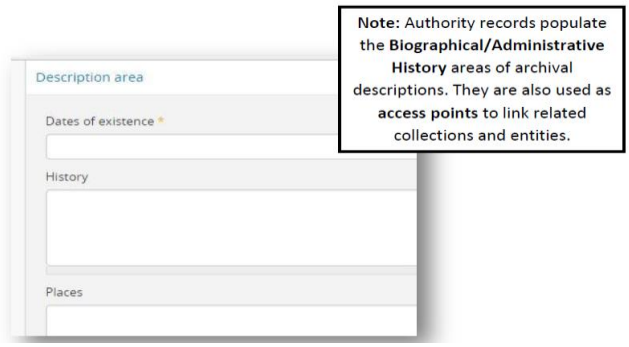


- If an authority heading does not exist for your authority record, use the following:
  - For persons, use the format: "[Surname], [Given Name], YYYY-YYYY" (e.g., "Smith, Jane, 1900-1999").

- For corporate bodies, write the official name of the organization in full. Do not use acronyms (e.g., use "Winnipeg Regional Health Authority", **not** "WRHA")
- For families (i.e., an authority record that describes more than one person with a familial or marital relationship), use the format "[Surname] family" (e.g., Smith family)

2.2 Description Area

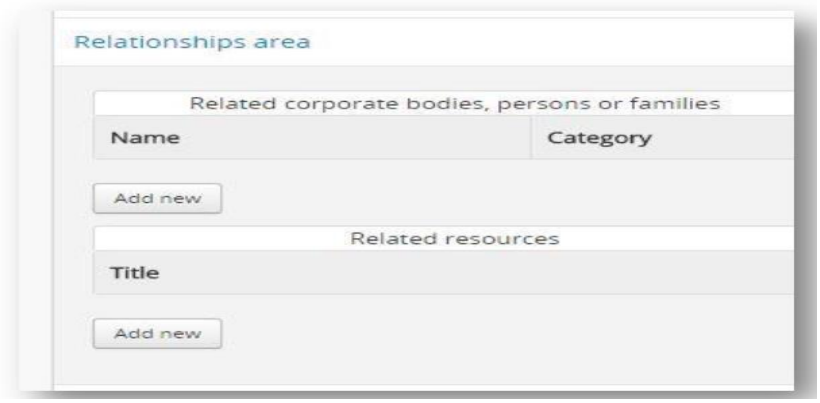
- Click **Description area**



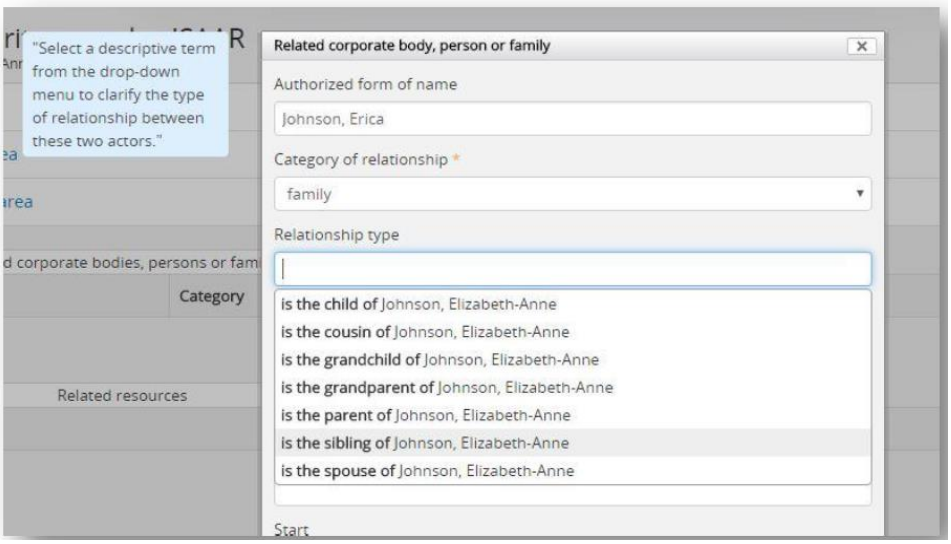
- Enter the entity's **Dates of existence** (e.g., 1922-2015, or 1985-). Note: If your authority is still in existence, leave the date open ended. **Do not add a word to describe its status (e.g., 1900-present, 1900-today, 1900-ongoing).**
- Under **History**, enter biographical information for a person or family (e.g., place(s) of birth, achievements, family, etc.) or an administrative history for your corporate body (e.g., mandate, professional activities, affiliations, etc.). Use dates as much as possible (e.g., In 1989, Jane Smith received an award for…").

2.3 Relationships Area

- The relationship area allows you to link your authority records to other authorities and establish a relationship (e.g., one authority is the sibling of another).
- If you are adding a relationship, you **MUST** save your authority record **BEFORE** doing so by clicking the **Create** button at the bottom of the page. If you are not adding a relationship, proceed to step 2.4 Control Area.
- Once you have saved your description, click **Edit** at the bottom of the page.
- Click **Relationships area**.



- If there are existing entities in PARBICA AtoM that relate to the entity being edited, choose **Add new** under **Related corporate bodies, persons, or families**.



- Search for the related entity by typing its name in the **Authorized form of name** field, then choose its name from the list that appears.
- Choose the **Category of relationship** from the drop-down list.
- Choose the **Type of relationship** by clicking in the box and then choosing from the list that appears.
- Enter the **Description** and **Dates** of the relationship if you know them and click **Submit**.

2.4 Control Area

- Click **Control area**

- If your institution has **Authority record identifiers**, enter the identifier in that field.
- Start typing in the name of your institution in **Maintaining repository** and click on it in the drop-down list. **Do not hit enter. Hitting enter will create a duplicate entry for your institution.**
- If your institution uses a repository identifier, add it in the **Institution identifier** field.
- Choose the record's **Status** and **Level of detail** from the drop-down menus.

- Enter the **Date of creation, revision or deletion** in the appropriate box, along with your name.
- Cite any information you used to create your authority record in the **Sources** field.
- List any notes you have about the creation or Maintenance of this record in the **Maintenance notes** box.
- Click the **Create** (or **Save**, if you're editing) button at the bottom of the page to save your authority record.

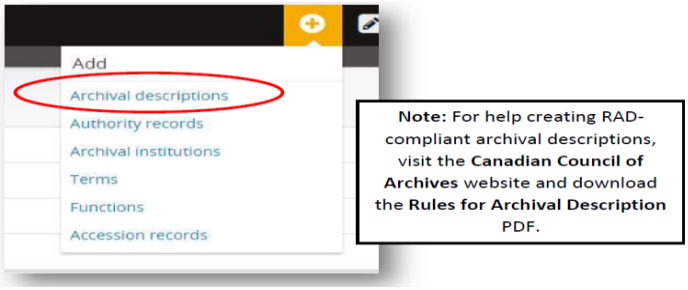
3 Adding/Editing Archival Descriptions in PARBICA AtoM

Archival descriptions provide AtoM users with important contextual information about records held by a given repository. Descriptions are typically hierarchical, meaning that they have multiple levels (e.g., fonds, series, files, items). This section will review how to populate top-level descriptions specifically (e.g. fonds or collection), but can be used to populate any level of description once you add child levels (see Step 4).

This section will focus on more commonly used fields. However, information on how to populate other fields can be found in the Rules for Archival Description (RAD) documentation or by clicking on any field in your description. By default, the archival descriptions in AtoM are displayed utilising the ISAD(G) standard; this display can be changed in the **Administration area** to accommodate Dublin Core, RAD, DACS, and other schemas. With this in mind, the information that follows regarding adding/editing archival descriptions in AtoM is following the default ISAD(G) display.

A note will appear to the left of every field, providing details on what information should be entered into the field, as well as a reference to the section of RAD that describes the purpose of the field in more detail (e.g., 1.8B9a in the above screenshot). The elements that are mandatory for archival description records are marked with a red asterisk.

- Click on the **Add** button in the top toolbar and select **Archival descriptions**

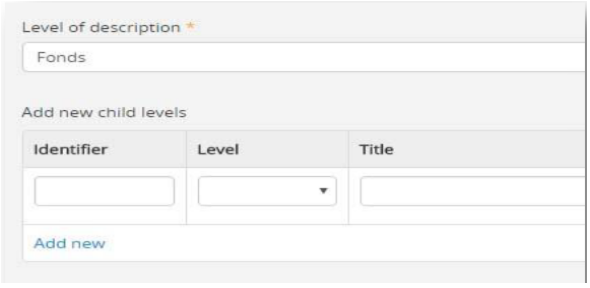


3.1 Identity Area

- Click **Identity area**.
- Under **Identifier**, enter the reference code of your fonds or collection. You can also generate an identifier code based on the current date.
- Under **Title**, provide a name for the collection. These are often in the form of "[Creator name] fonds" or "[Creator name] collection". Note: For top-level descriptions, always include, in lower case, "fonds" or "collection" in your title field (e.g., "**J**ohn **S**mith **f**onds" **not** "**J**ohn **S**mith" or "**J**ohn **S**mith **F**onds"; this is to distinguish between the description level and the creator name).
- Under **Dates**, there is a choice between "Creation" and "Accumulation" types, as well as starting and ending description fields. "Creation" dates have to do with the creation

of the archive being described and “Accumulation” dates refer to any registration or recordkeeping information around the archive being described.

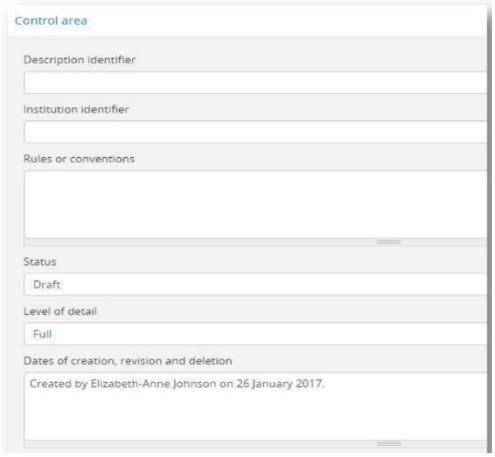
- Indicate the correct **level of description** that you are adding or editing. The levels range from small to large, e.g., items to collections. You can add new child levels if there is a logical hierarchy to the description.



- Under **Extent and medium**, identify the number of individual parts of the archive being described using numerals and units of description or measurement.

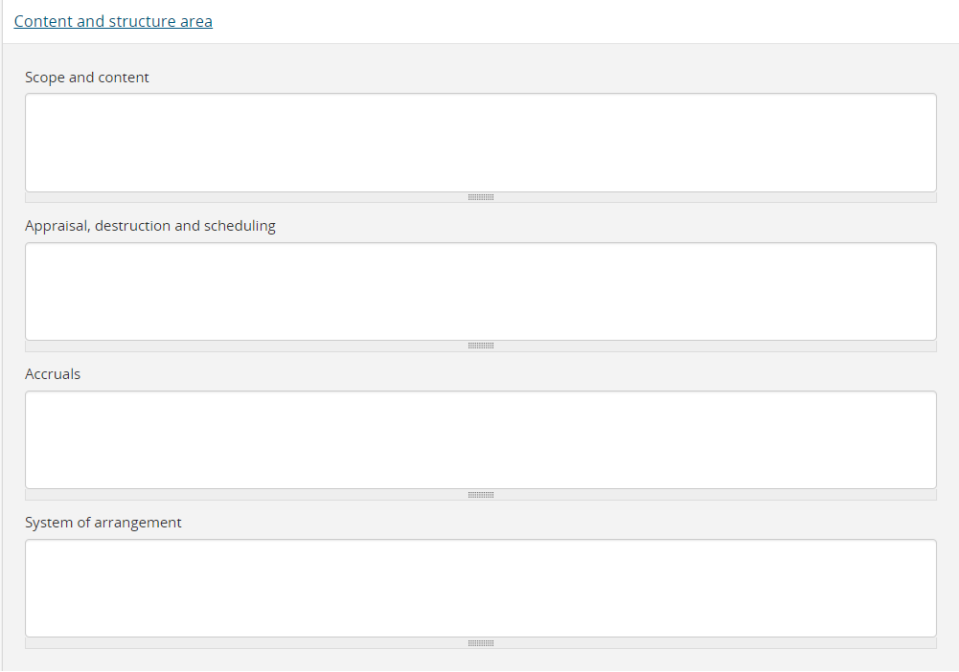
3.2 Context Area

- Click **Context area.**
- Under **Name of creator(s)**, record the identity of the organisation(s) or individual(s) responsible for the creation, registration, and maintenance of the archival description. You can search for an already existing name in the drop-down element if they have been entered as an authority record in AtoM; click on it from the list rather than hitting “enter”. Alternatively, you can type a new name to be added as an authority; if you type a new name incorrectly, hover over the text and select the “x” to delete it.
- **Repository**, **Archival history**, and **Immediate source of acquisition or transfer** are non-mandatory free text fields where details around the chain of custody of an archive, including the transfer of ownership, can be provided.



3.3 Content and structure Area

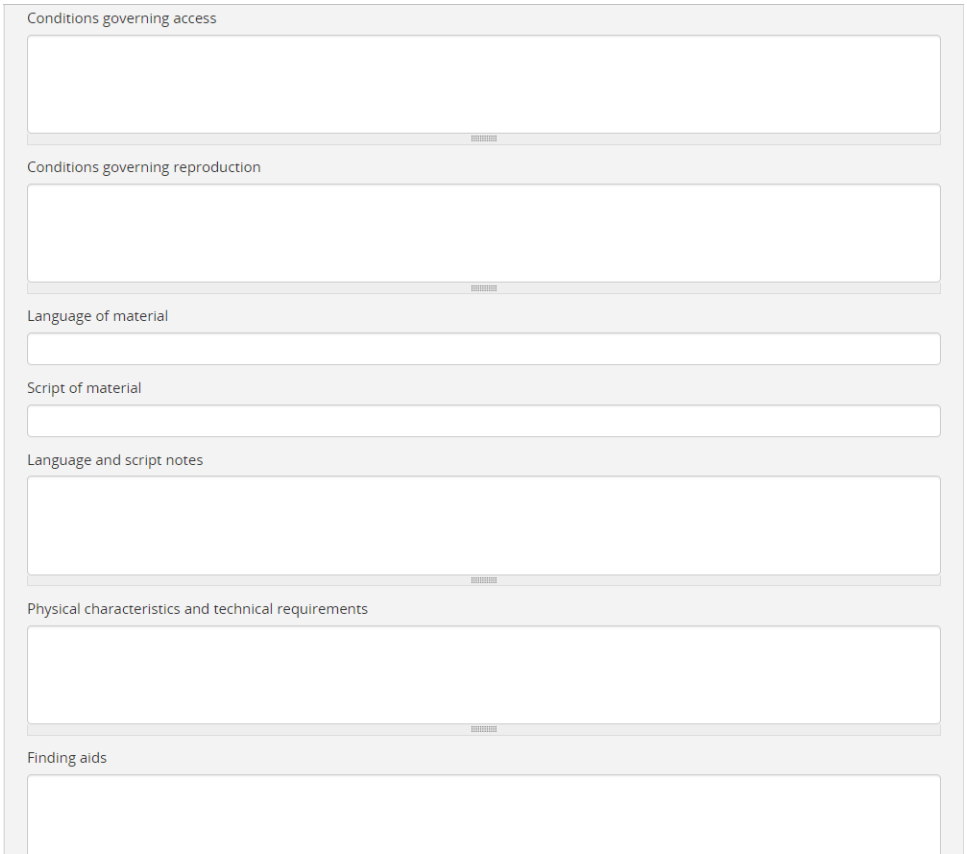
- Click **Content and structure area.**



- The elements in this area are non-mandatory free text fields that allow for detailed summaries of the collection's scope, schedules (e.g. appraisal or destruction), anticipated accruals, and general order or classification system.
- Descriptions in these elements are informed by the ISAD(G) standard to enable a high level of detail and contextual information.

3.4 Conditions of access and use Area

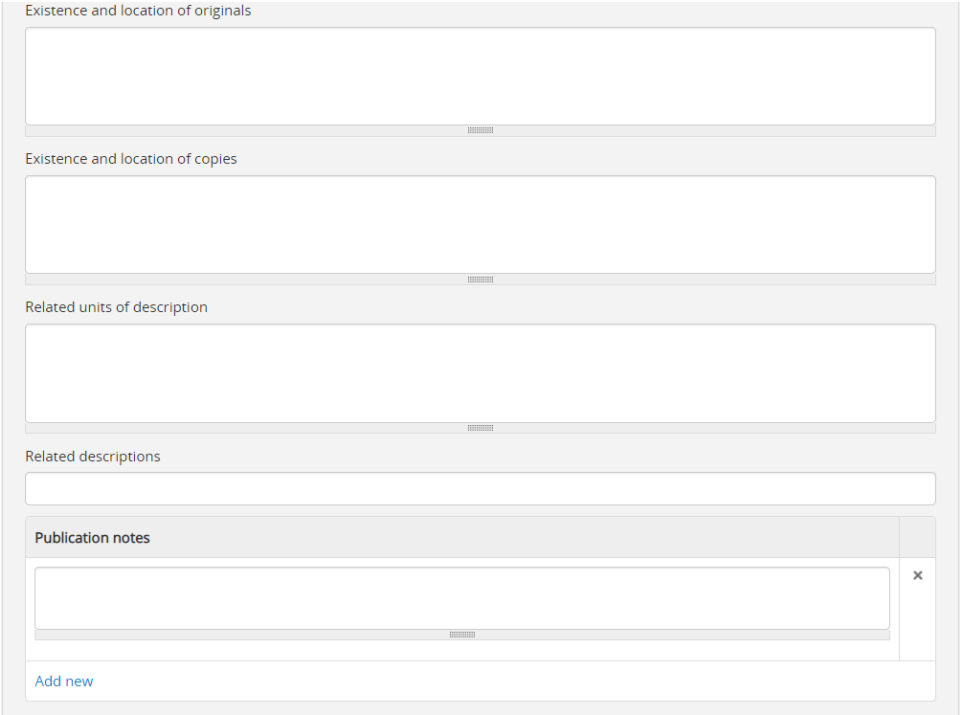
- Click **Conditions of access and use area**.



- The elements in this area are mainly non-mandatory free text fields that allow for detailed summaries of any conditions around the collection's access policies, duplication and copyright policies, available finding aids, and characteristics or requirements that affect the usage of the collection, such as specialised hardware or software.
- Descriptions in these elements are informed by the ISAD(G) standard to enable a high level of detail and contextual information. If there aren't any conditions to elaborate on, then no statements are necessary in the description.
- **Language of material** and **language and script notes** are drop-down menus. Multiple languages and scripts can be selected from the comprehensive lists. To populate these fields, begin typing the information and once the correct item appears, **click on it in the drop-down list**. **Do not hit enter. Hitting enter will create duplicates.**
- If you've selected incorrectly, hover over the text and select the "x" to delete it.

3.5 Allied materials Area

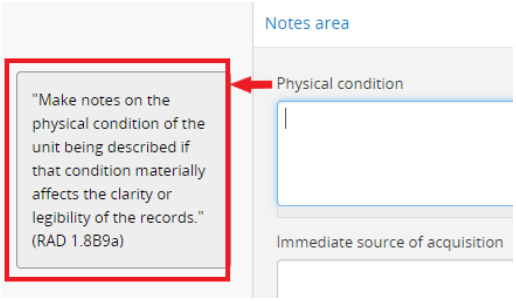
- Click **Allied materials area**.
- This area is for information about any other existing units that relate to the collection being described, for instance any originals or duplicates and their locations.



- The elements in this area are mainly non-mandatory free text fields that allow for detailed summaries about those archival entities and their locations.
- **Related descriptions** is a drop-down field where related archival descriptions already existing in the AtoM instance may be referenced. To populate this field, begin typing the information and once the correct item appears, **click on it in the drop-down list**. **Do not hit enter. Hitting enter will create duplicates.**
- The **Publication notes** element is for citations to any publications, research, studies, etc. that involve or reference the entity being described. Multiple citations may be logged in this element.

3.6 Notes Area

- Click on **Notes area**.
- There is one main free-text field where you can enter any notes about the units being described that can't be accommodated by any of the other descriptive elements available.
- You have the option to add multiple "Notes" fields if there are unique groupings of information you wish to include in this area.



3.7 Access Points

- Click on **Access points**.

- Begin typing any relevant **Subjects**, **Places**, **Genres**, or **Names** in the appropriate field. When the list appears, **select the correct term in the drop-down menu. Do not hit enter. Hitting enter will create duplicate access points.**
- Note: As this user guide was a modified version of MAIN's AtoM Tutorials, the subjects conform to the Library of Congress' FAST Subject Headings. Please view the MAIN Policy Guide for examples before adding access points to your description; the policy guide also holds a trove of other archival descriptive guidance that may be beneficial when creating and editing descriptions in AtoM.

3.8 Description control Area

- Click on **Description control area**.
- This area consists of elements pertaining to the archival description (e.g. creation details, level of detail, status, source material, etc.) rather than the archival entities or units themselves.
- Enter any **description identifiers** or **institution identifiers**, if they are employed by your institution.
- Record any international, national, or local standards that informed the archival description in the **rules or conventions** field.
- Choose the **Status** of the description: "draft" (not yet revised), "revised" (changes/additions have been made), or "final" (no future additions or revisions are expected)–from the drop-down menu.
- Choose the **Level of detail** of the description – "full" (includes all applicable elements in the description), "partial" (includes all mandatory elements), or "minimal" (does not include all mandatory elements) – from the drop-down menu.
- Enter the **Dates of creation, revision, and deletion** of the level of the description and your name.

- Select the **Language** and/or **Script** used to build the description from the drop-down menus.
- Cite any information you used in the creation of this description in the **Sources** field.
- **Archivist's notes** is a free-text element where you can reflect details around the individuals and/or sources involved in preparing the description. You have the option to add multiple "Archivist's notes" fields if there are unique sources you wish to include in this area.

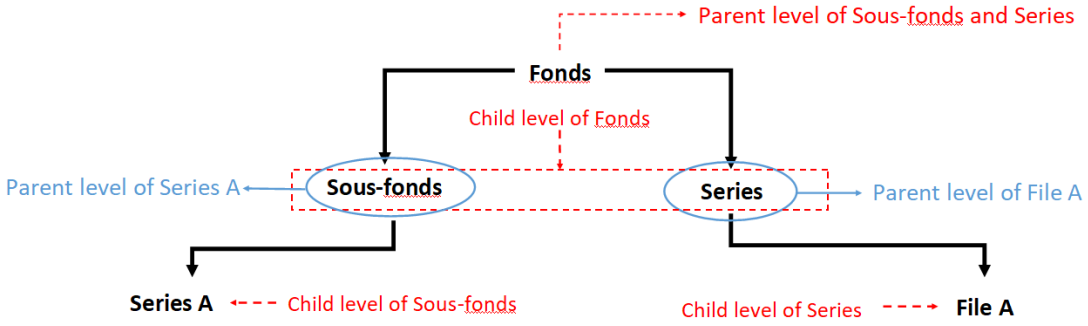
3.9 Saving Your Description

- Once you're done populating your description fields, click the **Create** button at the bottom of the page. Or, if you have already created the description and are simply editing it, click **Save**.

4 Adding Child Levels to Existing Archival Descriptions

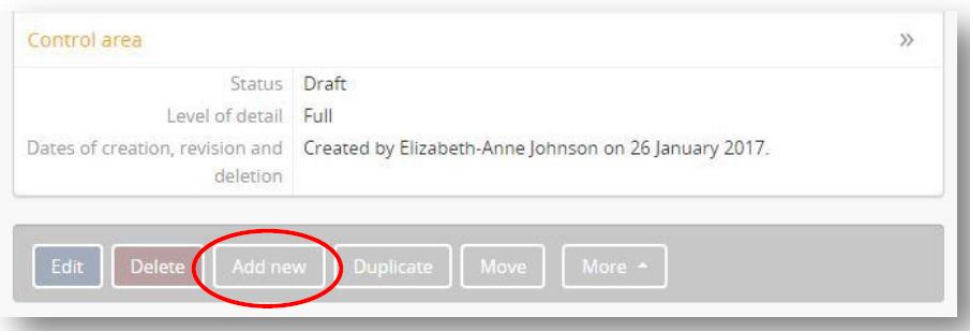
NOTE:

Child levels are descriptions that fall under higher levels of archival description, or "parent level" descriptions. If your highest level of description is a fonds or collection, the next levels down are likely sous-fonds or series. In the scenario outlined below, the fonds is the parent level, and the sous-fonds and series directly linked to it are its child levels. Alternatively, if your series have files, the series would be the child level of the fonds but the parent level of the files.

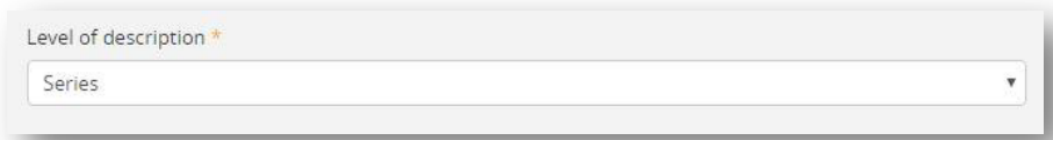


4.1 Creating Child Levels – Method One

- Navigate to the description to which you want to add child levels (e.g., if you are adding a series, go to the parent fonds-level description for that series). At the bottom of the page, click **Add new**.



- Fill out the appropriate fields as discussed, starting from Step 3.1. Make sure to select the level that applies to the new child level you are creating under **Level of description** in the **Title and statement of responsibility area**.

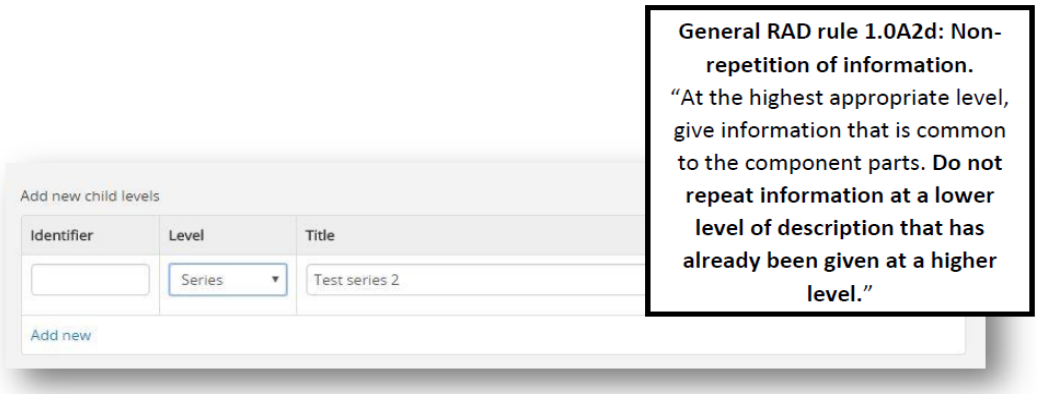


- When all relevant fields are populated, click **Create** at the bottom of the page.

4.2 Creating Child Levels – Method Two

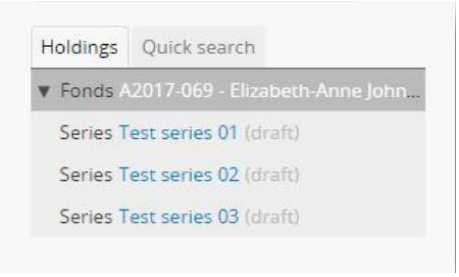
- Navigate to the description to which you want to add child levels. Click on **Title and statement of responsibility area**.

- Scroll down to **Add new child levels**.



- Choose the **Level** of description you would like to add from the drop-down menu.
- If your institution assigns an identifier to a given level of description, enter it in the **Identifier** field.
- Enter the **Title** of the new child level
- Enter the date(s) of the new child level
- Click **Add new** (or press the Enter key) to add another child level. Note: By default, when you add new child levels, the **Level** of description field will be prepopulated with the last level of description you selected.

- Once you are done adding new levels of description, click **Save** at the bottom of the page. You should see the new levels in the tree view on the left-hand side of the screen. Note: If the levels of description do not appear in the right order, see Step 5.1.

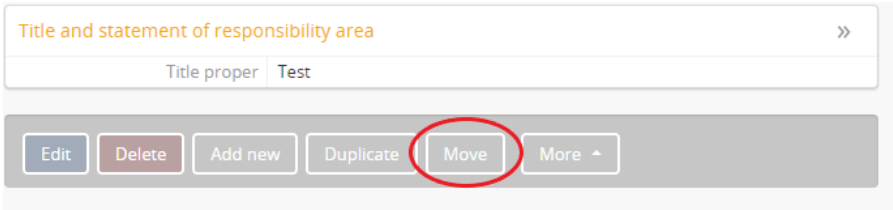


- To add more information to the child levels created using the second method, you must click on each level in the tree view and edit them individually (see Step 3.1 - Step 3.8).

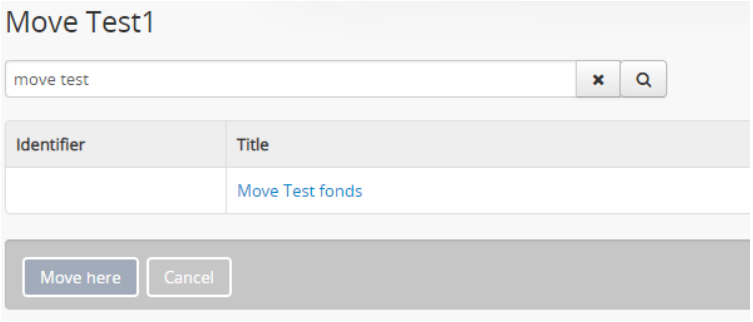
5 Arrangement Features

5.1 Moving Levels of Description

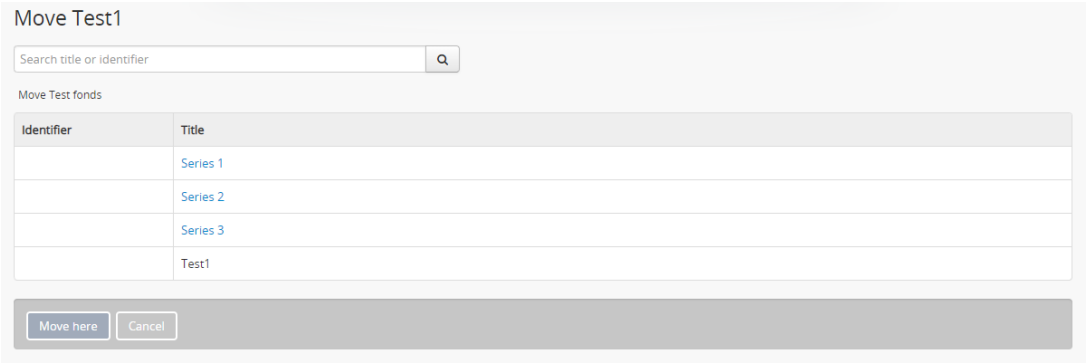
- A child level of a description can be moved to a different parent by clicking on the **Move** button at the bottom of the description you wish to move.



- In the search field, enter the title of the parent level description to which you wish to move your child level description, and click on the magnifying glass icon to search. Click on the hyperlinked title of the level for which you are searching.



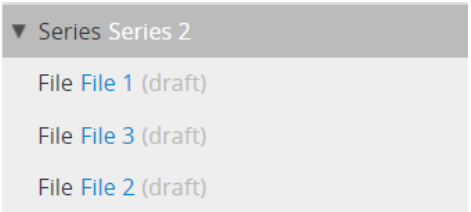
- Once you've clicked on the hyperlink, you will see any other child levels that are linked to the level of description you selected in the previous step. If you click **Move here**, your description will be linked to the parent level of the child levels listed. Or, you can click on one of these child levels if you wish to make it the parent level of the description you are currently moving.



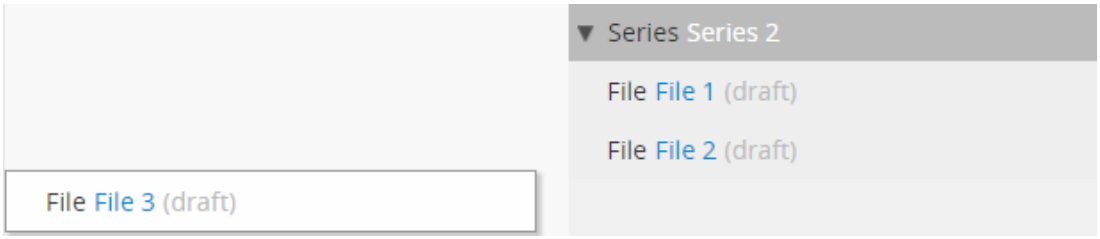
- By default, your level of description will be listed last among other child levels already found under the parent level to which your description was moved. You can change this order by following the steps in step 5.1.2.

5.2 Dragging and Dropping Child Levels

- You can change the order of child levels linked under the same parent level description by dragging and dropping the files in the tree view. Note: You cannot drag and drop a level of description to a different parent level description.



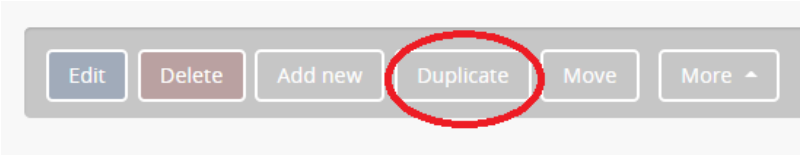
- Click the description level you want to move, holding the mouse button down until you have dragged the level of description to the correct location. The file you selected will disappear from the tree view, appearing outside of it.



- Drag your mouse to the correct location to re-order your level(s) of description and let go of the mouse. The tree view will refresh and your child levels should appear in the correct order.

5.3 Duplicating Descriptions

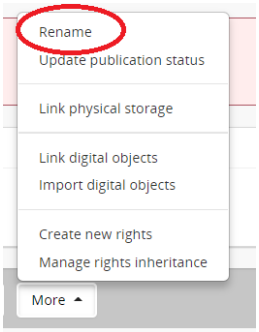
- You can use previous descriptions as a template for new descriptions by clicking on the **Duplicate** button at the bottom of the level of description you wish to use as a template.



- Note: The duplicate will appear as a stand-alone level of description. Consequently, if you are duplicating a child level description, you will have to link it to the correct parent level description (see Step 5.1).
- A near-exact copy of your level of description should be created. It will not include an identifier, as a unique identifier will have to be assigned.
- If you are assigning a different title to the duplicated level of description, you may wish to update the URL as it will reflect the original level of description duplicated. For example, if your original level of description had the URL: https://atom.example.com/test-fonds, then the hyperlink automatically generated for your duplicated item would be https://atom.example.com/test-fonds-1. To change the URL ending, see Step 5.3.

5.4 Changing Slugs

- A Slug is the portion of your URL that follows https://atom.example.com/. For example, the portion of the URL highlighted with bold text and underlined below is the slug:
    - http://atom.example.com/**test-fonds**
- You can alter your slug by clicking on the **More** button at the bottom of the description you wish to edit and select **Rename.**

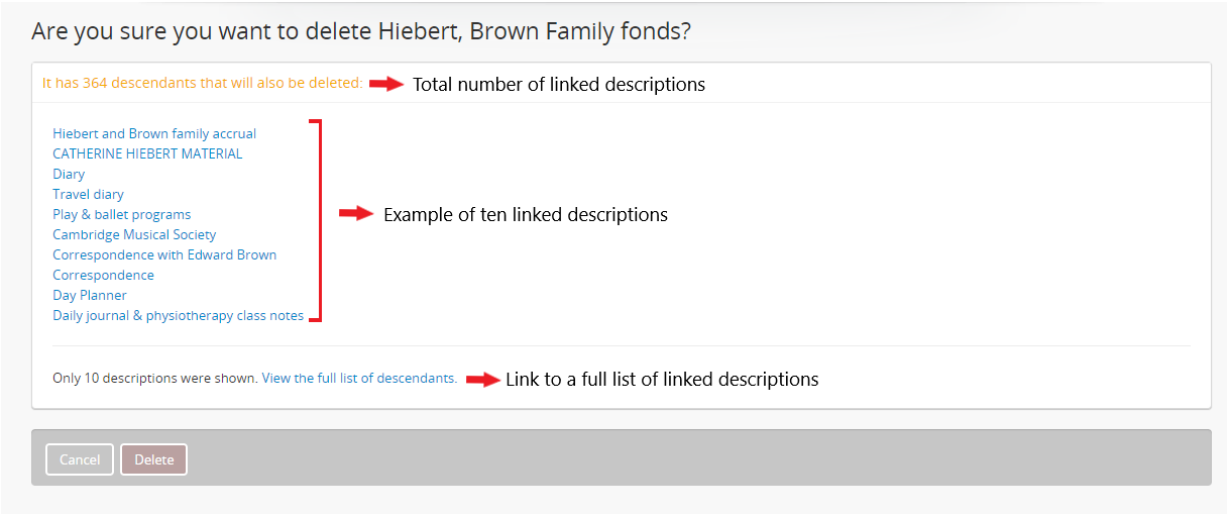


- Updating the title field will automatically change the title of your level of description and the slug. The slug will mirror the title, replacing spaces with hyphens and removing any punctuation from the title. For example, a level of description titled **Test fonds** will generate the slug **test-fonds**. Similarly, a level of description titled **John "Jack" Smith fonds** will generate the slug **john-jack-smith-fonds**, removing the quotes from the title.
- To change your slug, but not your title, edit the slug field. Any edits that do not conform to the slug formatting rules will be auto-corrected once you click outside of the field.
- If you choose a slug that already exists in PARBICA AtoM, it will automatically add a number to differentiate it (e.g., if **test-fonds** already exists, the slug will be **test-fonds-1**).
- When you have made your changes, click **Update**.

5.5 Deleting Descriptions/Authorities

- Depending on your level of access, you may or may not have the ability to delete descriptions. If you do not have the ability to delete, it may be that another person in your institution is responsible for deleting content. If no one in your institution is able to delete content, you may request deletion permissions from the site administrator.
- If you have deletion permissions, you will notice a red "Delete" button at the bottom of either a description or authority record page.

- Note: By deleting a level of description, you are deleting **ALL** child levels of description linked to it. For example, if you delete a fonds with linked series and objects, you will not only be deleting the fonds, but all the series, and any levels or objects linked to those series as well. Similarly, if you delete a series, you will be deleting all linked subseries and/or files. Consequently, it's important to make sure you **only** delete the intended descriptions.
- Once you click delete, you will be asked to confirm whether you want to delete the selected entry. For levels of description, information on the linked levels that will be deleted alongside the parent level description will be provided. If you are sure you want to delete the description or authority and any linked content, click "Delete".



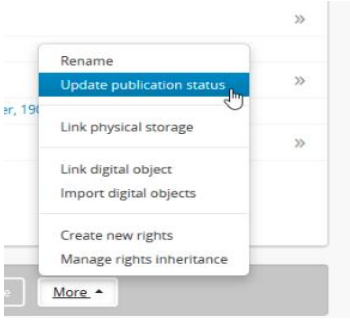
- It is also important to note that while deleting a level of description will delete linked descriptions, it will not delete other types of linked information. For example, if you wish to delete an entire fonds or collection, your authority record will still exist, unlinked from the description. If you wish to delete all content related to the description, you will have to delete some content separately.
- If you delete a significant amount of content at once, AtoM can become overloaded and the server can sometimes freeze up, causing a 500 error for anyone attempting to access it. To avoid this, try to delete smaller levels of description and work your way up (e.g., delete each series individually and then their parent fonds). If this isn't possible due to quantity, contact us using the contact information in 1.1 and we will delete the description for you.

6 Finalizing your PARBICA AtoM descriptions

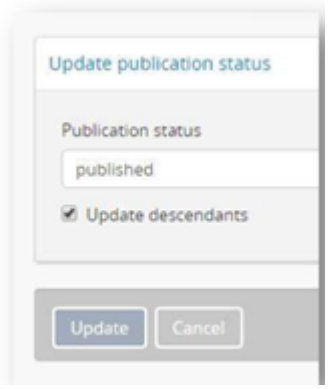
6.1 Publishing Your Descriptions

- All descriptions you create are automatically saved as Draft. To publish a description, go to the level you wish to publish (to publish a description and all related child levels,

select the highest level). Click on the **More** button and select **Update publication status**.

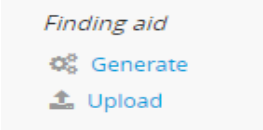


- Under **Publication status** select **Published** from the drop-down menu. To apply this change to all lower-level descriptions, check the **Update descendants** box.

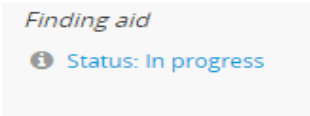


6.2 Generating a PDF Finding Aid

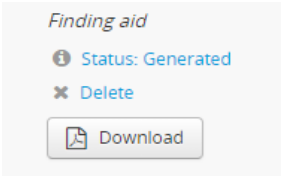
- A PDF can be generated from your description to allow users to download your finding aid. To generate a pdf, your description must already be published (see Step 6.1). Once it's published, on the right-side of your description, click **Generate** under **Finding aid**.



- Your finding aid area should then change to show your pdf finding aid is in progress.

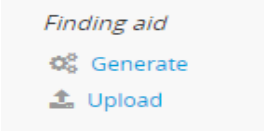


- If you remain on the description page once you've clicked **Generate**, the **Status: In progress** message appearing under **Finding aid** will remain. You must refresh the page to see if the PDF is finalized. You may also close your browser and check back on the finding aid later. Larger finding aids will take longer to generate.
- When the PDF has been generated, you should see **Status: Generated**, as well as a link to **Delete** the pdf finding aid, and a **Download** button to go to the generated PDF.
- If changes are made to your finding aid at a later date, you should delete the existing pdf and generate a new one to ensure the changes are included.



6.3 Uploading an Existing Finding aid

- If you have an existing finding aid that you would like to upload, click on the **Upload** link under **Finding aid**. Note: Your finding aid must be in PDF format for this step.



- Click on **Choose file** and select your PDF finding aid.
- If you remain on the description page once you've clicked **Generate**, the **Status: In progress** message appearing under **Finding aid** will remain. You must refresh the page to see if the PDF is finalized. You may also close your browser and check back on the finding aid later. Larger finding aids will take longer to generate.
- Once your PDF is uploaded, the status will change to **Status: Uploaded**.
- If changes are made to your finding aid at a later date, you should delete the existing pdf and upload a new one to ensure the changes are included.
- **Do not upload a finding aid as a digital object following the instructions in step 7. Digital objects should only be uploaded if they are part of a repository's holdings (e.g., a digitized photograph from a collection)**.

7 Uploading Digital Objects

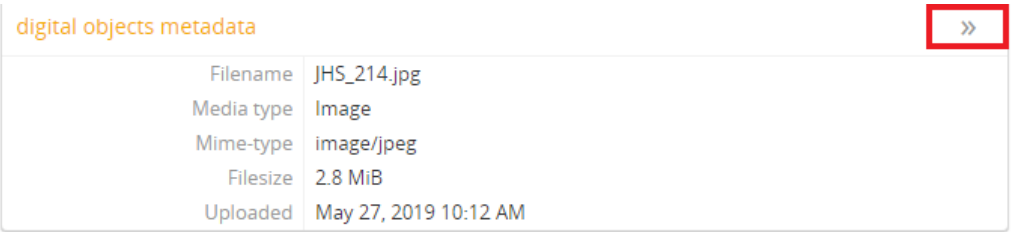
For the purpose of this document, a **Digital object** refers to a "born-digital" or digitized copy of an archival record in your repository, such as scanned documents or photos, or photos from a digital camera. These objects are uploaded to PARBICA AtoM so that they can be accessed by researchers and others. Records such as finding aids or internal documents **do not** qualify as digital objects and should not be uploaded to PARBICA AtoM through the methods outlined in this section. For an example of how digital objects are used on AtoM, please see the **Digital Objects** section of the Manitoba Archival Information Network (**MAIN) Policy Guide**.

Note: As a default, you can only link one digital object to each level of description (e.g., one per item), but later on, if you edit the item, you can add additional objects – sew how to upload objects below for details.

However, you should be selective of the objects you upload. Objects uploaded to AtoM should only provide an overview or sample of a repository's holdings, as it may have limited storage space.

7.1 Uploading a Digital Object to AtoM

- From the description of the item to which you want to add digital objects, click **More** at the bottom of the page. Choose **Link digital objects**.
- Click on the **Upload a digital object** to expand. Please note that the default maximum size of an object you can upload is 64 MB. This limit can be increased in AtoM's server settings (nginx and php) and requires a restart to take hold. More information can be found at AtoM's admin manual[1].The administrator of the server can perform these changes.
- Click on **Choose file** and browse to and select your file.
- Click **Create**. Your file is uploaded, and AtoM generates a Reference representation and Thumbnail representation as well for more convenient browsing. Your file becomes so called "Preservation Master" which is the original file you have uploaded. Please note that Preservation Master files are accessible only to privileged, i.e., logged in users with Edit privileges. Although this can be changed via Permissions and you can grant access to all users, even without login.
- A thumbnail of your object should appear at the top of your description. To get to the full image, click on the thumbnail.
- Click on the arrow to the right of the **digital objects metadata** area to add additional metadata about the digital object.



List of file formats which can be rendered in AtoM is here https://www.accesstomemory.org/en/docs/latest/user-manual/import-export/upload-digital-object/#file-formats, other formats can still be uploaded to AtoM but won't be shown/played unless you have a plugin in your internet browser.

7.1.1 Uploading multiple digital objects

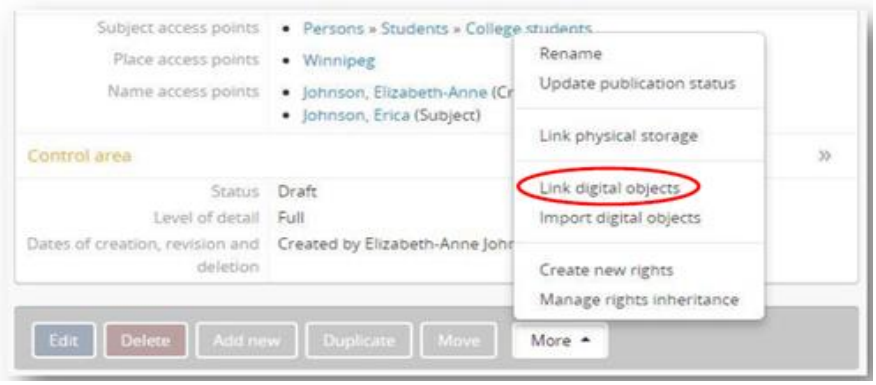
Please note that by uploading more than 1 object to existing archival description you are creating new archival description for each object (children description), i.e. for each object there will be new description created. In AtoM, there is a 1:1 relationship between a digital object and an information object - meaning every digital object must be associated with an archival description, typically at the file or item level. That is why when you upload multiple images to a description, lower levels of description are created for each digital object.

[1] Installation execution limits at https://www.accesstomemory.org/en/docs/latest/admin-manual/installation/execution-limits/#installation-execution-limits and FAQ on 504 error at https://www.accesstomemory.org/en/docs/latest/admin-manual/maintenance/troubleshooting/#faq-504-error

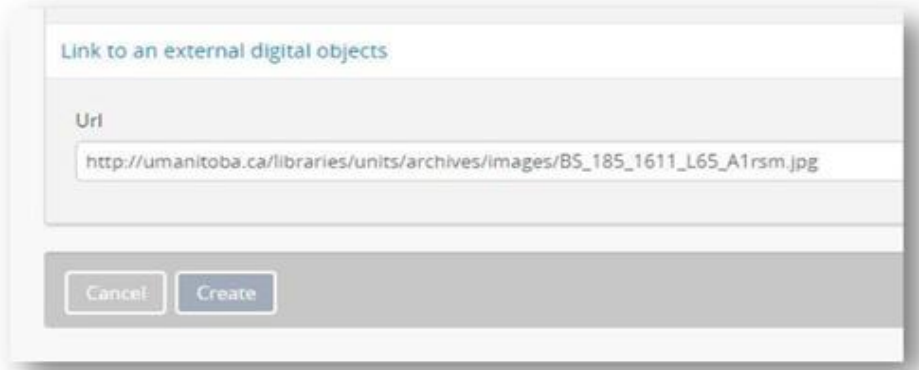
- If you want to upload multiple digital objects to an item, you can do it by going to the archival description/item, click **More** and choose **Import digital objects** option.
- From the next screen you can drag and drop multiple objects to the specified space or **browse** to the folder and upload them that way.
- Choose what **Level of description** you want those objects to be (Item, Collection, Fond etc.)
- Click **Upload** when you are done with adding the objects.
- You will be presented with the option of labeling the objects, when done click **Save**

7.2 Linking to external digital objects

- At the bottom of the description to which you'd like to link a digital object, click **More** and then **Link digital objects**



- Under **Link to an external digital objects** [sic], enter the URL of the object you'd like to link. Then click **Create.**



- A thumbnail of your object should appear at the top of your description. To get to the full image, click on the thumbnail.
- Click **Edit** to add additional metadata about the digital object.
- Objects linked to descriptions will also show up as thumbnails in the searchable list of collections.

8 Access restrictions

8.1 Access restrictions for Digital objects (via Administrator)

When you upload digital object, you might want to make it accessible only to limited audience, such as only to the users who have access to concrete Archival institution.

Most straightforward way how to change restrictions for Digital Object is to go to the Archival Description of that object, click on “More” button then “Create New Rights” and set up the restriction there.

There are two different, but inter-connected, types of restrictions:

- one of them is tied to the **User Group**
- other type of restriction is Rights connected to Copyright, Policies etc.

Not logged-in users (Anonymous user group) can see only file thumbnail as a default. In Administration of AtoM, it is possible to edit the permissions for each User Group. Our instance of AtoM is set up in a way that the public can see only Thumbnail representation. The permission can be based on 3 aspects (see the screenshot below):

- for all archival descriptions
- by archival institution (you can choose an institution and specify different access permission for archival descriptions and objects in that Institution for each User Group
- by specific archival description (in case you want to be able to specify restrictions for one concrete item)

Permissions for all archival description

All archival description

Action	Permission
Read	◉ Grant ○ Deny ○ Inherit
Create	○ Grant ○ Deny ◉ Inherit
Update	○ Grant ○ Deny ◉ Inherit
Delete	○ Grant ○ Deny ◉ Inherit
View draft	○ Grant ○ Deny ◉ Inherit
Publish	○ Grant ○ Deny ◉ Inherit
Access master	○ Grant ○ Deny ◉ Inherit
Access reference	○ Grant ○ Deny ◉ Inherit
Access thumbnail	◉ Grant ○ Deny ○ Inherit

Permissions by archival description

Permissions by archival institution

Screenshot of Permission settings for "Anonymous" user User Group

Other way how to restrict access to digital objects and their representations is in Admin area for Permissions. Here are listed all types of permissions (Licence, Copyright etc.) and administrator can specify how combination of certain permission influences availability of digital objects. As a default it is possible to use Permission type "Disseminate" to limit access to description or digital object. It is also possible to config AtoM in administration area so the Permission type "Display" can be used for managing access to Digital Objects, which was done in our instance of AtoM.

PREMIS access permissions

PREMIS act

Display

Permissions

	Allow			Conditional			Disallow		
Basis	Master	Reference	Thumb	Master	Reference	Thumb	Master	Reference	Thumb
Copyright	☑	☑	☑	☐	☑	☑	☐	☐	☐
License	☑	☑	☑	☐	☑	☑	☐	☐	☐
Statute	☑	☑	☑	☐	☑	☑	☐	☐	☐
Policy	☑	☑	☑	☐	☑	☑	☐	☐	☐
Donor	☑	☑	☑	☐	☑	☑	☐	☐	☐

All / None

8.2 Adding rights to an archival description (Editor)

1. First, navigate **to the archival description you** wish to add rights to. You can do this **by browsing or searching for the archival description** - see Access content for more information on navigation in AtoM.
2. In the **button block, click on "More," then on** "Create new rights".
3. The Rights entry page allows you to establish the basis for which rights are granted or disallowed as well as describing the rights themselves.

First you need to create "Rights basis":

AtoM provides a drop-down menu to select the basis for the rights associated with the description. You can select: Copyright, License, Statute, Policy, or Donor.

Then you can add "Act/Granted rights" to created Rights basis:

Once you have established the basis for the rights you need to grant, fill in the Act/Granted rights fields:

1. The "Act" data entry field is a drop-down list. You can select: Delete, Discover, Display, Disseminate, Migrate, Modify, and Replicate.
2. The "Restriction" data entry field provides three choices: Allow, Disallow or Conditional.
3. Add Start and End dates for the right. Leave the end date blank if it is unknown or open.
4. You can add notes related to the granted right.

If you are finished adding granted rights related to this basis, click Save. If you have more granted rights to add related to this basis, click Add granted right and fill in the fields again. Click Save when you are finished.

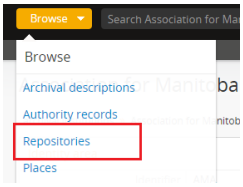
8.3 Access restrictions for Archival description

Similar to restrictions settings for digital objects, but permissions like Read, Delete, Edit are relevant, not those relevant to digital objects (master, reference representation etc.).

9 Editing Archival institutions/Repository Pages

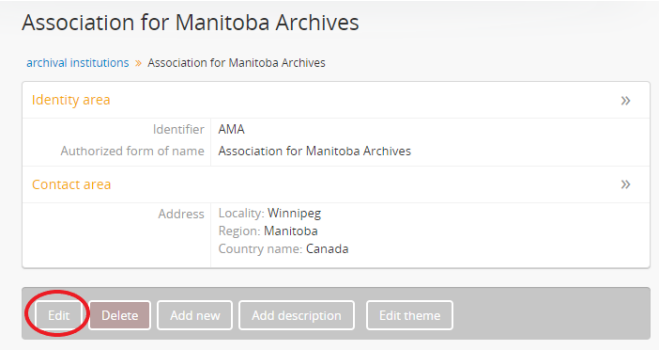
9.1 Editing Your Archival institutions/Repository Page

- To edit your description, find your institution in the repository list by clicking on the **Browse** button and clicking on **Archival institutions**

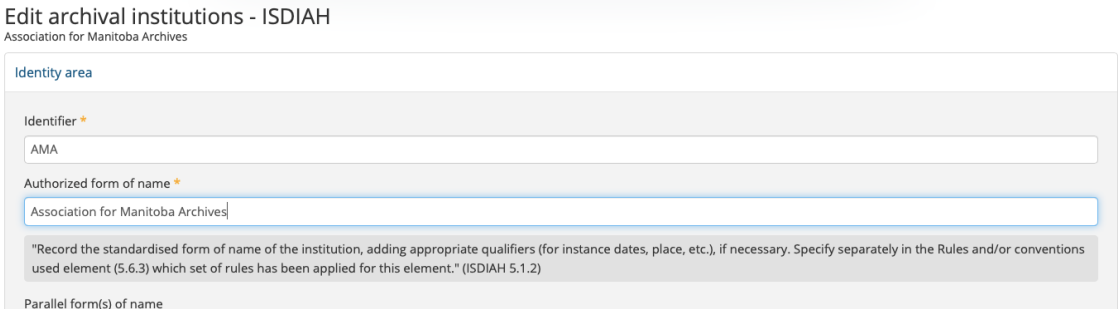


- Select your repository from the listed options.

- From your repository page, click **Edit**.

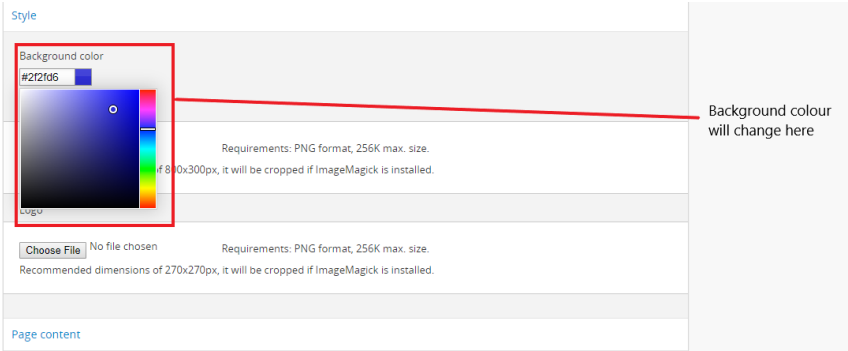


- Update your fields as needed. If you click in a given field, more information about how to populate the field will appear. A reference number to the relevant section in the International Standard for Describing Institutions with Archival Holdings will also appear. When you are done updating your repository, click **Save**.

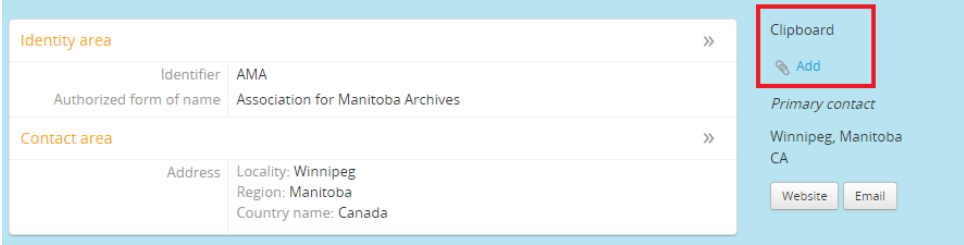


- To edit the look of your repository page, click on **Edit theme**.

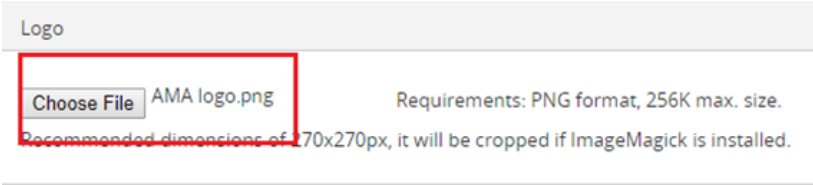
- To change the background colour of your repository page, and all descriptions linked to your repository, select a colour in the **Style** area.



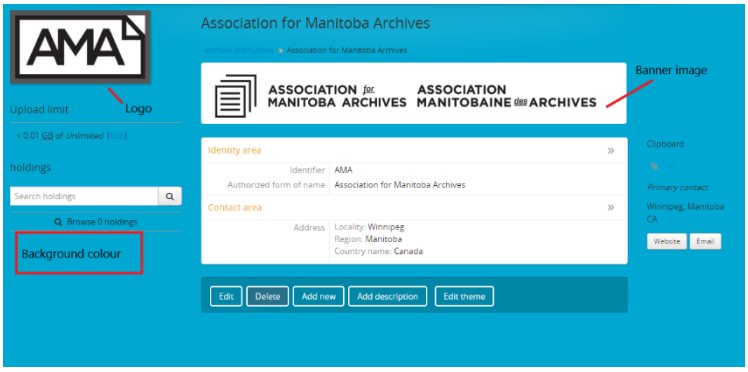
- Choosing a background colour may affect the contrast between some of the text that appears on the page and make it difficult for people who are visually impaired to read the text. When selecting a background colour, make sure users can still clearly read text such as the **Add** link under the **Clipboard** section.



- To add a banner or logo, click on **Choose File** in the **Banner** or **Logo** area respectively. Select the file you wish to use for your banner/logo. Note: The file should be saved as a PNG and may have to be cropped or resized to appear properly.



- Click **Save**.



10Further Information and Resources

Association for Manitoba Archives MAIN Tutorials, Policies, and Resources
http://mbarchives.ca/AtoM-Tutorials
AtoM Documentation
https://wiki.accesstomemory.org/Resources/Documentation
AtoM Users Google Group
https://groups.google.com/forum/#!forum/ica-atom-users
International Standard Archival Authority Record for Corporate Bodies, Persons and Families
https://www.ica.org/sites/default/files/CBPS_Guidelines_ISAAR_Second-edition_EN.pdf
International Standard for Describing Institutions with Archival Holdings
https://www.ica.org/en/isdiah-international-standard-describing-institutions-archival-holdings
Library of Congress FAST Subject Headings (for subject access points)
https://fast.oclc.org/searchfast/
Library of Congress Subject Headings (Use only for authorities)
http://id.loc.gov/authorities/subjects.html
Rules for Archival Description
http://www.cdncouncilarchives.ca/RAD/RADComplete_July2008.pdf