

# OBERLIN COLLEGE ARCHIVES ARCHON MANUAL

*These instructions were developed specifically for archivists, interns, and student assistants at the Oberlin College Archives for following our local conventions for loading content from finding guides to Archon. For more information, contact Anne Cuyler Salsich, Associate Archivist, at [anne.salsich@oberlin.edu](mailto:anne.salsich@oberlin.edu).*

## CREATING A NEW COLLECTION ON ARCHON

Upon logging into the Archon admin interface, click the arrow tab towards the upper left of the page. From here, pull down the “Collections” tab and click on “Collection Manager.” Then click the “New” button with the green addition symbol. You are now ready to input information to create the new collection.

### ***Filling in the fields***

This document will cover all of the input fields in the collection manager. It is divided into a section for each tab, and information on how to fill in each individual field, along with examples. A couple of good tricks when filling in the fields – pressing the tab key at any time will bump your cursor over to the next field. If you tab to a field that is a drop down list, you can use the arrow keys on the keyboard to navigate the list.

## **GENERAL**

**Title:** the title of the collection. For personal papers, this will usually be (first name)(last name)(papers). The title found in the top right corner of Word document finding guide pages is usually the best indicator for this.

Examples:

*Julia Finney Monroe Papers*

*Kirke L. and Mary T. Cowdery Papers*

**Repository:** Oberlin College Archives

**Classification:** Record Group number

Examples:

Personal papers: 30

Maps: 52

# OBERLIN COLLEGE ARCHIVES ARCHON MANUAL

**Collection Identifier:** Unique Collection Identifier number. Always formatted as 3 digits. Use the number following the general record group number.

Examples:

If 30/1, *001*

If 30/28, *028*

If 30/412, *412*

**Sort title:** Title used for alphabetized sorting. For personal papers, this will usually be (last name), (first name), (papers). In cases not involving personal names, the Sort Title can remain the same as the Title.

Examples:

*Monroe, Julia Finney, Papers*

*Cowdery, Kirke L. and Mary T., Papers*

*Map Collection*

**Normal Date:** First and last years of all materials in the collection, respectively.

Example: *1884-1944*

**Inclusive date:** Years of all materials in the collection, formatted as necessary using a span of dates or a comma separated list of dates and/or date spans. This field will be automatically filled out after the Normal Date field is filled out, so change if necessary. If the Inclusive Date is the same as the Normal Date, reflect that here.

Example: *1884, 1890-1912, 1917, 1939-1944.*

**Predominant date:** The years pertaining to the majority of the collection when it differs significantly from the inclusive dates. This field need only be filled in if the Title Page of the Word document finding guide reflects a predominant date, marked by a date span in parentheses.

Example: *1896-1912*

**Finding Aid Author:** the Processed By name, if available. If not, put *Archives staff*. Formatted as (first name) (last name).

For common processors at the OCA, we have standardized their names:

*William E. Bigglestone*

*Roland M. Baumann*

*Kenneth Grossi*

*Anne Cuyler Salsich*

# OBERLIN COLLEGE ARCHIVES ARCHON MANUAL

**Creators:** Usually the person/people, or organization, that generated the content of the collection. Clicking in the field will reveal two buttons on the right: one for a drop-down browse menu, and another for adding a new creator. Creators only need to be added once, so if the creator of the collection is already in the menu, simply select them. Each creator entry should be for either an individual or an institution – do not create a single entry for a married couple or a family. Usually there will be only one listed creator, but in certain cases there will be more necessary. Determining which people do and do not constitute listed creators is a decision for the archivists to make.

To add a new creator, click the Add button that appears on the right. A new box will appear with fields to fill out.

Name: name of individual or institution. If an individual, format as Last Name, First Name. Example: *Monroe, Julia Finney*

Dates: Year of Birth – Year of Death  
Example: *1837-1905*

Creator Type: For individuals, select “Personal Name”

Creator Source: Select from the following:  
Local Authority File (most commonly used here)  
Library of Congress Name Authority File  
Getty Union List of Artist Names Online

Repository: Select “Oberlin College Archives.”

Biographical/Historical Note: Copy and paste from finding guide.

**Primary creator:** Automatically selects the first creator added in the previous field. If multiple creators are present, select the one responsible for the bulk of the material in the collection.

## **DESCRIPTION**

### ***A word on formatting***

Fields under the *Description* tab, specifically *Scope* and *Biographical/Historical Note* tend to have a large amount of text in them that is copied and pasted from the finding guide Word documents. When copying and pasting these large bodies of text, you will find that they appear slightly differently in the Archon fields in terms of formatting. The skipped line that demarcates paragraphs in the *Scope* and *Biography* sections in the Word documents become far more pronounced in

# OBERLIN COLLEGE ARCHIVES ARCHON MANUAL

Archon, often to a distracting and confusing degree. A simple return without a skipped line is enough, so when pasting these bodies of text, go through and delete the line breaks between paragraphs.

You may run into problems with indentation as well, most often in the *Arrangement* section when dealing with Series Descriptions or a simple inventory. Sometimes after entering information in a field, html tags will appear in the text. They will probably look like this:

```
<p style="margin-left:1.0in;">  
<p style="margin-left:.5in;">
```

When this occurs, simply go back into the field and delete these tags wherever they are. Also remember that use of the tab key for indentation will not work in Archon – pressing it will only accelerate your cursor to the next field. Instead use series of spaces to achieve the same effects.

Finally, keep in mind that even once you have entered information into the fields, how it looks in the administrative interface is not how it will be viewed by the public. At any time during the process, you can click the button towards the top of the page that says “Public View” to open, and in a new browser window, the Archon entry exactly how it will look to average users. From here it will be clearly apparent if you need to make additional formatting changes to any of the fields.

**Abstract:** Leave blank, or, if the first sentence or two in the Scope and Content note lends itself, paste that in. Also, there may be collections that do not have much in the way of historical notes, and in those cases, use the *Abstract* field instead.

**Scope:** Copy and paste Scope and Content note. Do not include the heading “Scope and Content.” Include Series Descriptions, adding the header in bold. When a short inventory is involved, it will be pasted into this section; see below.

## **INVENTORIES**

We have two ways that we put the inventory lists themselves on Archon. Although Archon does allow for the user to manually create an inventory composed of box/folder hierarchies through the “Collection Content Manager”, we found the process to be too time-consuming, bulky, and just generally not flexible enough to accommodate our many various finding guides. Instead, we use two of our own methods.

# OBERLIN COLLEGE ARCHIVES ARCHON MANUAL

The first we refer to as a “simple inventory” and the second as a “PDF inventory.” We will use a simple inventory when the inventory is short, usually about one page or less when formatted in the Word document finding guide, and a PDF inventory for just about anything longer.

## ***Simple inventories***

In the cases of short inventory lists, we will just cut and paste the inventory itself into the “Description” tab below Scope and Content and Series Descriptions in the Collection Manager.

## ***PDF inventories***

For anything longer than about a page, we will use a PDF inventory. This method consists of taking the Inventory portion of the Word document finding guide and turning into a PDF. This can be very easily done in MS Word. Go to the “File” tab on the top bar, select “Save As”, and select “PDF” from the Format pull-down menu. Because these PDFs will be uploaded to the Internet, make sure the file name has no spaces or other characters unsuitable for URLs (underscores work nicely instead of spaces). We generally name these files as the last name, if a the collection is of personal papers, and then the word “inventory.” For example, the Raymond H. Stetson Papers has a PDF inventory titled *Stetson\_Inventory.pdf* because the last name Stetson is unique in our collection. For more common last names, we will include the first name as well, such as for the James Monroe Papers: *Monroe\_James\_Inventory.pdf*

Once created, these PDF files will need to be uploaded to the web server. Doing so will give each PDF file its own unique URL, and this URL is placed in the “Other URL” field under the “Other Info” tab in the Collection Manager.

**Arrangement:** Leave blank; archivists may want to input this field.

## **Biographical/Historical Note**

Copy and paste Biography note or Administrative History from finding guide. Include the Sources Consulted section beneath it, if available. If sources are consulted, create a heading above the sources saying “**SOURCES CONSULTED**” in all bolded caps.

## **Biographical Historical Author**

If specified, the author of the biographical note. If not specified, assume author to be processor. If no processor’s name is provided (i.e. Processed by: Archives staff) then simply leave blank.

**Subjects:** This field can be used to assign many different types of subject terms. Currently the drop down menu provides terms for types of materials (genre) in the collection, as selected from the Getty Art and Architecture Thesaurus. The archivist will assign the genre terms. Currently the terms are these:

# OBERLIN COLLEGE ARCHIVES ARCHON MANUAL

**Languages:** Languages of materials in the collection. Will almost always usually be English, but some collections will contain Chinese, French, German, and other languages as well. Add as many languages as necessary.

## **LOCATION**

### **Location**

The archivists have determined the content of the drop-down menu: Archives vault, 407A, Archives back storage room, 420A Flat files, Goodrich Room Flat Files, Main Special Collections vault

**Content:** # of boxes

Examples: *1 box*  
*25 boxes*

### **Range, Section, Shelf**

Location on shelves. This information is not listed in the Word document finding guide and must be acquired by visiting the collection on the shelf. Section increases from 1 starting at the side of the range that has the range number and contents listed. When a collection jumps ranges or shelves or sections, separate by commas and in a consistent order in each field. Dashes to indicate spans will only be used for shelves. Shelves increase from 1, starting at the top shelf.

Example: For a collection that is in Range 37 on which starts on Shelf 7 of Section 1, continues through Shelf 8 and then jumps onto Shelves 1 and 2 of Section 2, you would format as:

*Range: 37*  
*Section: 1, 2*  
*Shelf: 7-8, 1-2*

Or if the collection is even larger and jumps ranges:

*Range: 37, 38*  
*Section: 4, 1* (indicating Section 4 of Range 37 and Section 1 of Range 38)  
*Shelf: 2-8, 1-6* (indicating Shelves 2-8 of Section 4 of Range 37, etc.)

**Extent:** the extent of the collection in linear feet. The extent should always be 3 digits unless it exceeds 99.9 linear feet.

Examples:  
*1.00 linear feet*  
*0.25 linear feet*

# OBERLIN COLLEGE ARCHIVES ARCHON MANUAL

*1.60 linear feet*  
*13.2 linear feet*  
*105.6 linear feet*

## **ACQUISITION**

### **Initial Date Acquired**

The date of the first accession in the collection. Will have to be looked up in the FileMaker Pro accessions database.

**Source:** leave blank.

### **Method**

Paste the Provenance, if available. Do not include a heading. If there is no Provenance available, then write "*Transfer.*" (Make sure a period is included at the end of this field.)

**Appraisal Info:** Leave blank.

**Accruals/Additions:** List all accessions. Format as *Accession Nos:* followed by all accession numbers, separated by commas. Include a period at the end.

Example:

*Accession Nos: 69, 1998/124, 2002/024.*

**Custodial History:** Leave blank.

## **RESTRICTIONS**

**Access/General:** Put the information from the ACCESS line of the title page of the finding guide. Include a period at the end. Will usually be *Unrestricted.*

Examples:

*Unrestricted.*

*Restricted items as noted on the Inventory.*

**Use/Rights:** Leave blank.

**Physical:** Leave blank.

# OBERLIN COLLEGE ARCHIVES ARCHON MANUAL

**Technical:** Leave blank.

## **OTHER INFO**

**Other URL:** If a PDF inventory, the URL for the PDF goes here. See above on PDF inventories for more details. The back end has been customized by the web development librarian such that this link displays as “Download Box / Folder List”.

**Other Note:** Leave blank.

**Book(s):** Leave blank.

**Digital Content:** Leave blank, unless archivist provides direction. Archon is not designed to hold much digital content, and URLs to existing published content works here.

## **RELATED MATERIALS**

**Related Mat’s:** Copy and paste RELATED MATERIALS section from finding guide. Do not include the heading. If none available, leave blank.

**Related Mat. URL:** Leave blank.

**Related Pubs:** Leave blank.

**Seperated Mat’s:** Leave blank.

**Orig/Copy Note:** Leave blank.

**Orig/Copy URL:** Leave blank.

**Preferred Cit.:** Leave blank.

## **FINDING AID INFO**

**Rules Used:** Select “Rules for Archival Description.”

**Processing Info:** Leave blank. This field does not display.



# OBERLIN COLLEGE ARCHIVES ARCHON MANUAL

**Revision History:** Copy and paste both the PROCESSED BY and the REVISED sections from the title page of the finding guide. Include *Revised by:* or *Revised:* before the list of revisions. If no revisions, leave blank.

Examples:

*Processed by William E. Bigglestone, 1972.*

*Revised by Megan Thompson, Tara L. Ikenouye and Kenneth Grossi, October 1997.*

*Revised 20 June 1995 by Eric Miller; 22 July 1997 by Tammy Martin, June 2002 by Archives staff.*

**Publication date:** Date of processing, found on the title page of the finding guide. If only a month and year is given, input the day as the 1st of the month. If only year is given, input the month and day as January 1<sup>st</sup>.

Examples:

*7/23/1995*

*6/1/1973*

*1/1/1969*

**Pub Note:** Leave blank.

**Written in:** Select English.

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