

OAC/Calisphere Contributor User Guide to Archon

This user guide is intended for institutions that are utilizing Archon to create EAD finding aids, for contribution to the Online Archive of California (OAC) and Calisphere websites.

For detailed information on utilizing Archon, which is beyond the scope of this guide, consult the usage documentation at <http://www.archon.org/UserManualv2.21.pdf>.

1. Repository Settings

Your Repository Settings in Archon needs to contain some basic information, which will appear in finding aid exports. Login as **Admin**, select **Archon Packages**, select **Collections**, then select **Repository Manager**.

The following data is required to meet *OAC Best Practice Guidelines for Encoded Archival Description, Version 2.0* ([OAC BPG EAD](#)) specifications:

- Repository Name
- MARC Organization Code

2. Collection Description Requirements for OAC

The *OAC Best Practice Guidelines for Encoded Archival Description, Version 2.0* ([OAC BPG EAD](#)) must be followed when contributing XML finding aids to the OAC.

The following tables list out Archon data entry fields that should have data, in order to meet the OAC BPG "OAC Basic" level encoding scheme requirements. The OAC Basic encoding scheme reflects single-level descriptive outputs at any level, but typically for large accumulations such as collections, record groups, fonds, or record series. It can, however, only describe materials at one explicitly articulated level and does not support multilevel encoding of subsequent lower levels (the "OAC Full" encoding scheme).

The third column in these tables references the page in which the elements and attributes guidelines tables appear in the OAC BPG EAD. Please refer to these pages for more detailed information.

Collection Information

- Login as **Admin**, select **Archon Packages**, select **Collections Manager**, then select **(Add New)**.
- Enter a **Title**.
- Enter the unique **Collection Identifier**.
- Enter a **Inclusive Dates** for the materials.
- Enter the **Extent Number** (cubic feet or linear feet).
- Click on the **"Next"** button at the bottom the window.

Table 1

Archon Label	EAD	OAC BPG EAD Citation
Title	<unittitle>	pg. 12
Collection Identifier	<unitid>	pg. 12
Inclusive Dates (First/Last Year)	<unitdate> NORMAL	pg. 12
Extent	<extent>	pg. 13

Collection Manager:
Tram Combs Papers (ID: 2)

Content Manager

Collection Information

Title:

Enable Web Output: Yes No

Collection Classification: No classification information has been entered into the Classification Manager.

Collection Identifier:

Sort Title:

First/Last Year:

Inclusive Dates:

Predominant Dates:

Type of Materials:

Extent:

Finding Aid Author:

Template:

[Add or Edit Digital Content](#)

Collection Description

- Click on the expanding + to open up the **Collection Description** section.
- Enter one **Scope** note to provide a prose statement summarizing the document types, formats, and topical coverage of the collection.
- Click on **Update**.

Table 2

Archon Label	EAD	OAC BPG EAD Citation
Scope	<scopecontent>	pg. 14

Template:

[Add or Edit Digital Content](#)

Location Information

Creator Information

Collection Description

Scope:

Arrangement:

Alt Extent Stmt:

Subjects

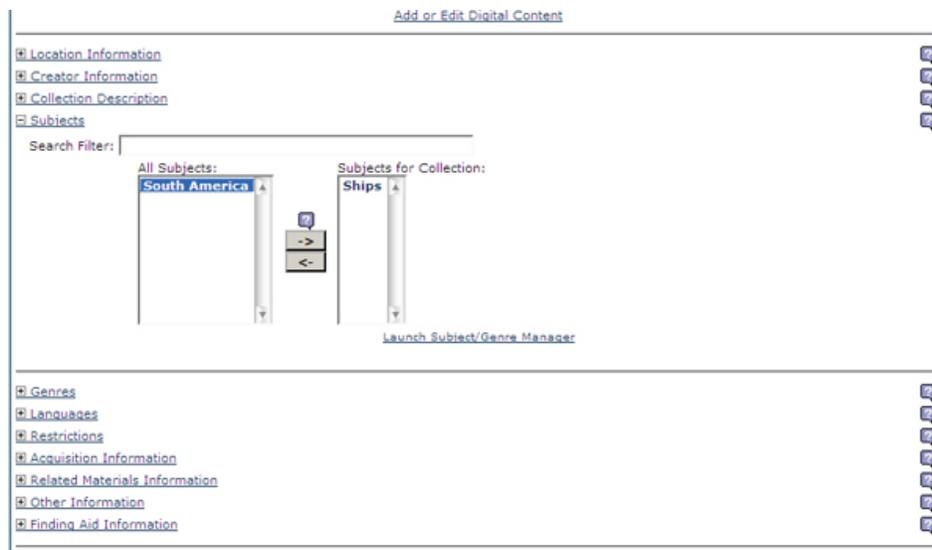
In order to promote content access to collections, the OAC requires at least three controlled access headings encoded using the following subelements: <persname>, <famname>, <corpname>, <title>, <geogname>, <genreform>, <occupation>, or <function>.

- Click on the expanding + to open up the **Subjects** section.

- If the subject isn't listed in **All Subjects**, click on **Launch Subject/Genre Manager** to add other subjects (personal name, family name, etc.)
- Click on **Update**.

Table 3

Archon Label	EAD	OAC BPG EAD Citation
	<controlaccess>	
Subjects	<persname>	pg. 15
Subjects	<subject>	pg. 18
Etc.		pg. 15-21

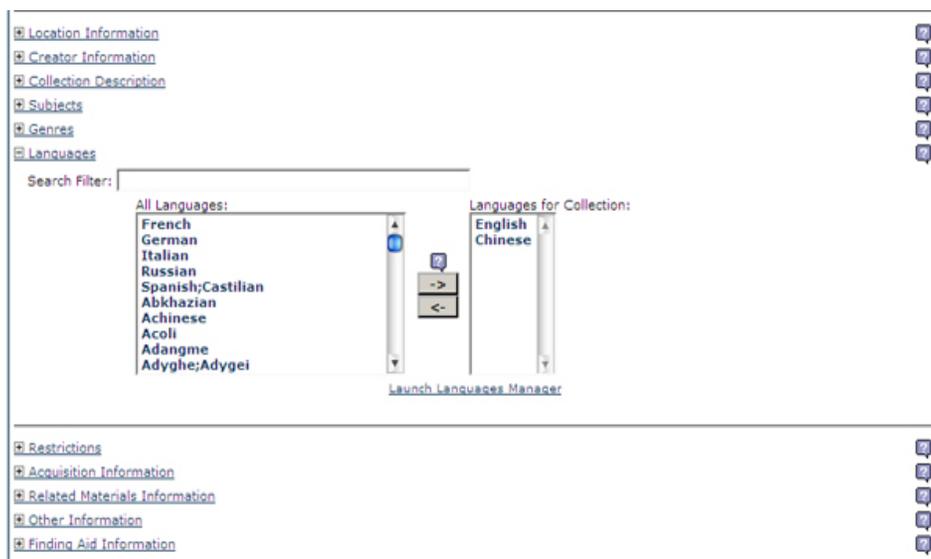


Languages

- Click on the expanding **+** to open up the **Languages** section.
- Select the language(s) used in the materials of the collection.
- Click on **Update**.

Table 4

Archon Label	EAD Elements	OAC BPG EAD Citation
Language	<langmaterial>	pg. 14



Restrictions

- Use one **Access/General** note to record particular access restrictions, even if the collection has no access.
- Use one **Use/Rights** note to tag for conditions governing the use of a collection after access has been provided.
- Click on **Update**.

Table 5

Archon Label	EAD	OAC BPG EAD Citation
Access/General	<accessrestrict>	pg. 14
Use/Rights	<userrestrict>	pg. 14

Acquisition Information

- Click on the expanding + to open up the **Acquisition Information** section.
- Entered the **Initial Date Acquired**.
- Click on **Update**.

Table 6

Archon Label	EAD	OAC BPG EAD Citation
Acquisition Information	<acqinfo>	pg. 14

[Subjects](#)
[Genres](#)
[Languages](#)
[Restrictions](#)
Acquisition Information

Initial Date Acquired: 2 / 14 / 1982

Source:

Method:

Appraisal Info:

Related Materials Information

- Click on the expanding + to open up the **Related Materials** section.
- Entered the **Preferred Citation**.
- Click on **Update**.

Table 7

Archon Label	EAD	OAC BPG EAD Citation
Preferred Cit.	<prefercite>	pg. 14

Separated Mat's: Separated Materials

Orig/Copy Note:

Orig/Copy URL:

Preferred Cit.: Preferred Citation

Finding Aid Information

- Click on the expanding + to open up the **Finding Aid Information** section.
- Entered the year the collection description was written in **Publication Date**.
- Enter the language in which the collection description was written in **Written In**.
- Click on **Update**.

Table 8

Archon Label	EAD	OAC BPG EAD Citation
Publication Date	<creation><date>	pg. 11
Language	<langmaterial>	pg. 14

3. Before Submitting to the OAC

OAC requires the following additional encoding, which is not supported by Archon in the EAD export file.

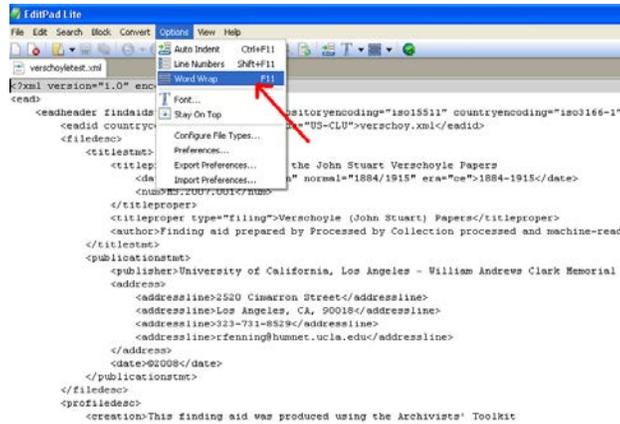
Archon users must manually add this data to their finding aids after exporting from Archon in order to meet *OAC Best Practice Guidelines for Encoded Archival Description, Version 2.0* ([OAC BPG EAD](#)) specifications. You can use a simple text editor or XML authoring tool to add this data (for references, see our [EAD Toolkit](#)).

Below is a table indicating the required EAD tag/attribute, the location of the required encoding in an EAD instance (represented in XPath syntax), and a reference to the OAC BPG EAD guidelines for additional information.

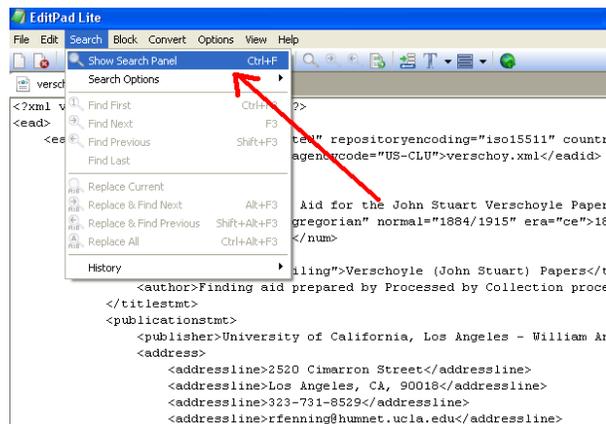
EAD Tag/Attribute	EAD Encoding Location (XPath)	OAC BPG EAD Citation
<titleproper> TYPE="FILING"	ead/eadheader/filedesc/title stmt/titleproper[@type]	<p>OAC requires a second <titleproper> with a type set to "filing". Encode the <i>filing title</i> of the finding aid and not the title of the fonds or record group being described.</p> <p>Example:</p> <p>Archon Output:</p> <pre><titleproper>William J. Clinton Papers</titleproper></pre> <p>Manual Output:</p> <pre><titleproper>William J. Clinton Papers</titleproper> <titleproper type="filing">Clinton (William J.) Papers</titleproper></pre>

To update your EAD file, we suggest using a simple text editor (such as EditPad or Note Tab) or a XML authoring tool (such as oXygen). Below is a summary of the editing process, using the free [EditPad Lite](#) software as an example:

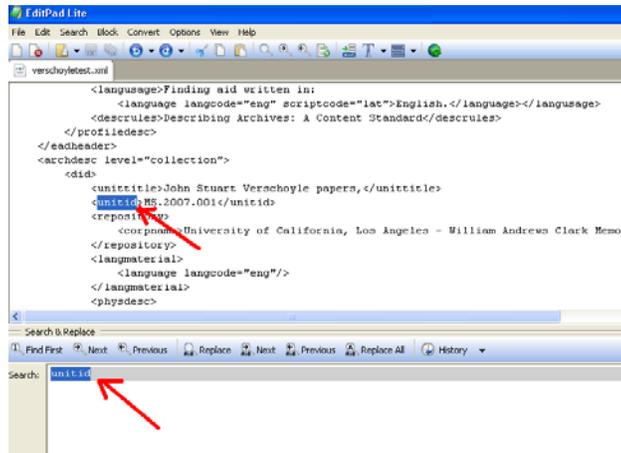
1. Open the EAD file, using the text editor
2. From the toolbar, select "word wrap" as a viewing option (in EditPad, select Options->Word Wrap)



3. From the toolbar, select the option to search for text in the file (in EditPad, select Search->Show Search Panel)



4. Search for the first occurrence of </titleproper> (in EditPad, enter the search term and select "Find First" to find the text)



5. Insert a `<titleproper type="filing">` tag, just *after* the last `</titleproper>` tag. Within `<titleproper type="filing">`, enter the filing title for the finding aid. Note that `<titleproper type="filing">` must also be closed with `</titleproper>`. For example (see red text for the added encoding):

```
<titlestmt>
<titleproper>Finding Aid for the John Stuart Verschoyle
Papers</titleproper>
<titleproper type="filing">Verschoyle (John Stuart)
Papers</titleproper>
. . .
```

6. Once you're done with the edits, save the file.