archives
SOCIETY OF ALBERTA

Alberta on Record

Database Reference Manual

www.albertaonrecord.ca

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Overview

About Alberta on Record

Alberta on Record (AOR) is the Archives Society of Alberta's (ASA) online portal that provides access to archival collections throughout Alberta. It contains thousands of archival descriptions, digitized photographs and documents, as well as repository information for archival institutions in the province of Alberta. In addition to material from Alberta, the database hosts records from archival repositories in Yukon. Descriptions from *Alberta on Record* are sent to the national database, ArchivesCanada.ca, where they can be accessed in conjunction with records from other provinces and territories across Canada. New additions and updates to *Alberta on Record* are published once a week, while descriptions on ArchivesCanada are updated less regularly.

Alberta was one of the first provinces in Canada to make archival descriptions available online in a shared environment in the late 1990s. *Alberta on Record* became the new database of ASA in 2013. It is based on AtoM (formerly ICA-AtoM) software developed by Artefactual Systems. AtoM stands for Access to Memory and is a web-based, open source software application for standards-based archival description and access in a multilingual, multi-repository environment. AtoM supports archival descriptive standards including *Rules for Archival Description (RAD),* and *General International Standard Archival Description (ISAD-G).* It also incorporates standards for describing authority records as well as archival institutions including the *International Standard Archival Authority Record for Corporate Bodies, Persons and Families (ISAAR-CPF)*, and *International Standard for Describing Institutions with Archival Holdings (ISDIAH).*

ASA's database *AOR* is aligned with national and international archival organizations. All the databases provided by provincial councils, with the exception of Quebec, as well as the database provided by the Canadian Council for Archives, ArchivesCanada.ca use AtoM software which facilitates the sharing of descriptions in an online environment. A list of other AtoM users can be found on Artefactual System's web site: http://www.artefactual.com/clients/.

ASA, through its Board of Directors, Secretariat and Committees, is responsible for ensuring the ongoing viability of *AOR* and for further developing and refining Alberta's archival online presence.

Institutional members of the ASA are responsible for updating and adding their own descriptions and related digital objects to *Alberta on Record*, and ensuring that their repository information is complete and up-to-date. Member institutions are also responsible for storing master and high-resolution versions of their digital material. *AOR* is an access database only. While it can accommodate access copies of digital assets, it does not have capacity to store archival copies.

Each ASA member institution can have one designated account for adding and editing descriptions to *AOR.* Members ensure that people who have access to this account have archival training and are familiar with the ASA policies and procedures described in this manual.

How *Alberta on Record* works

AOR holds three different types of record descriptions that are based on national or international standards:

> **Archival institutions** – <u>contain information about archival institutions</u>, based on the *International Standard for Describing Institutions with Archival Holdings (ISDIAH).*

> **Authority records** – <u>contain information about creators of archives</u> that can be a person, family, or corporate body. This is based on the *International Standard Archival Authority Record for Corporate Bodies, Persons and Families (ISAAR-CPF).*

> **Archival descriptions** – <u>contain information about the archival material</u> and are based on Canadian *Rules for Archival Description.* Lower levels of descriptions (i.e. sous-fonds, series, files, and item level descriptions) are linked to fonds or collection level descriptions.

These three types of records are all linked and each archival description has a link to the relevant authority record(s) that contains information about the creator(s) of the material, as well as a link to the institutional repository page. ***The authority record must be in existence before the archival description is entered, and then it must be linked to the appropriate description.***

In all areas of description, a variety of sections will be displayed when signed on as an authorised user. Clicking on the section will open them up to display the fields within it. Once the fields are displayed, users can click within any field to bring up a Tooltip that provides a hint about what information should be added to that field, as well as a reference to the appropriate standard.

There are some fields that have been designated by the AtoM software system with an asterisk as "required", and ASA has also identified certain fields that are mandatory. The required fields for archival institutions, authority records and archival descriptions in *AOR* have been marked **[Required]** in this manual. When entering descriptions on AOR, please ensure ASA's required fields are entered.

Log-in Information

To log-on to *AOR*, an authorized user must click the log in button in the upper right hand corner of the site www.edit.albertaonrecord.ca and enter the assigned e-mail address and password. Once logged into the system, the username will appear in the top right-hand corner. Users can change their passwords and are responsible for its security. The Database Administrator can reset a password if the user does not have access to it.

Additional Features

There are a number of additional features available on *AOR* including customized theming for your institution and bulk import and export option for descriptions. If you are interested in obtaining more information about any of the following features, please contact the ASA's Database Administrator (DA).

Archival Institution Description

The Archival Institution or Repository description contains information about your repository, contact details, access policy, opening hours, and any other information that you wish to share with the public. This record will be linked to all of your archival descriptions, so it is important to keep it up to date.

To view and edit an existing institutional record:

- Log into the edit site with your email address and password
- Select the "Archival Institutions" link on the Browse menu
- Find your institution by scrolling through the results or type the name of your institution in the "Search Archival Institution" box at the top of the screen
- Click on your institution's name to display the full record
- Click on the "edit" button at the bottom of the screen to make changes
- Click "Save" when you finish updating the description

Archival institution descriptions are based on the ISDIAH standard for describing archival institutions. There are many information fields available but only some are required.

Identity area

Identifier [Required]	This code is created by ASA in consultation with archival institutions.
Authorized form of name [Required]	The official name of repository.
Parallel form(s) of name	Parallel form(s) of name of repository.
Other form(s) of name	Any other forms of name by which the institution may be known (e.g. acronyms, changes of name over time, etc.)
Type	Select the type from the drop-down list that is most appropriate; i.e. University, Municipal, Religious, etc.

Contact area

Main [Required]	Includes primary contact name or position, phone, fax, email and URL for website.
Physical location [Required]	Contains address, postal code, etc.
Other details	Used for related contact information, e.g. secondary contact.

Description area

History	Relevant information about the history of your institution.
Geographical and cultural context	Geographical area your institution belongs to. Any other relevant information about the cultural context of the institution.

Mandates/sources of authority	Used to record any documents or laws that act as a source of authority of your institution.
Administrative structure	Used to describe the administrative structure of your institution.
Records management and collecting policies	Used to describe records management and collecting policies of your institution.
Buildings	Used to describe characteristics of buildings of your institution, capacity of storage area, etc.
Archival and other holdings	Short description of the holdings of your institution, including information about the volume of holdings, media formats, thematic coverage, etc.
Finding aids, guides & publications	Used if applicable

Access area

Opening times [Required]	Lists the opening and closing times for your institution as well as details of any planned closures.
Conditions and requirements	Describes access policies, including any restrictions or regulations regarding the use of materials and facilities.
Accessibility	Provides details for users with disabilities.

Services area

Research services	Includes information about research and consultation rooms, enquiry services, etc.
Reproduction Services	Used to record information about general conditions, fees, and restrictions regarding reproduction services that are available to the public.
Public Areas	Includes information about services available in public spaces (exhibitions, cafeterias, cash machines, etc.)

Authority Records

Add Authority Records

In *AOR* different archival institutions may have records for the same person, family or corporate body. It is agreed that users create an authority record for their own repository even if the record for the same person, family or corporate body has been already added by a user from a different institution. It is very important to complete all the required fields including Description identifier, which will allow users to easily identify in the search results what repository a given authority record belongs to.

Before creating a new authority record:

- Do a search to see if there is an authority record for that particular person, family or corporate body already created by your institution in *AOR.*

- If there is, and you need to edit it, please send required changes to the Database Administrator. Please note that users currently cannot edit authority records themselves for security reasons.

- To create a new authority record, click on the 'Add' menu (+ sign) at the top right-hand side of the menu of the edit site for *AOR*. Select 'Authority record' from the drop-down list.

- Click on the title of each heading to expand the section and then complete your description by filling out the appropriate fields, ensuring that all of the required fields are completed.

- Save the new authority record.

Identity area

Type of entity [Required]	Choose the applicable type of entity from the drop-down list: Person, Family, or Corporate Body.
Authorized form(s) of name [Required]	Record the standardized form of name being described in accordance with RAD: e.g. Nelson, Marie; Smith (family); Grande Cache Historical Society.
Parallel forms of name	Parallel form(s) of name.
Standardized form(s) of name according to other rules	Use if applicable.
Other form(s) of name	Use if applicable.
Identifiers for Corporate Bodies	Use if known (e.g. company registration number)

* NOTE: Existing authority records can also be accessed by clicking on the 'Name of the Creator' hyperlink in the archival description area of an archival description.

Description area

Dates of existence [Required]	Record the dates of existence of the entity being described; i.e. for persons include the birth and death dates; for corporate bodies, include the dates of establishment and dissolution, if known.
History [Required]	Record in narrative form or as a chronology the main life events, activities, achievements and/or roles of the entity being described. (*Note:* This section is the administrative history/biographical sketch field from RAD.)
Places	Record the name of the predominant place(s)/jurisdictions(s), together with the nature and covering dates of the relationship with the entity.
Legal status	Record the legal status and where appropriate the type of corporate body.
Functions, occupations and activities	Record the functions, occupations and activities performed by the entity being described.
Mandates/sources of authority	Use if applicable
Internal structures/Genealogy	Use if applicable
General context	Use if applicable

Relationship area

Links between authority records	Use this field to establish a link between the authority record you are editing and an existing authority record; i.e. use the 'Add new' option under Related corporate bodies, persons or families, type in the first few letters of the name and then click the name in the drop-down list that you wish to link to.
Category of relationship	Select the appropriate relationship from the drop-down list: Hierarchical, Temporal, Family, or Associative.
Description of relationship	Use if applicable.
Dates of the relationship	Record the start and end dates of the relationship between the two entities where applicable.
Links with archival descriptions	Use this field to establish a link with an existing archival description; i.e. click 'Add New' in the Related Resources section, type the first few letters of the title of the archival description and click on the title when it appears.*
Nature of the relationship	Describe the nature of the relationships between the corporate body, person or family and the related resource. The default option is 'Creation'; see the drop-down list for other options.
Date of the related resources and/or relationship	Provide start and end dates for the related resource or the dates of the relationship of the authority record entity with that resource.

* **NOTE:** A link between an authority record and an archival description can be made in either the authority record or the archival description.

Control area

Authority record identifier [Required]	Record your institutional code here plus a unique authority record identifier. If your institution does not have unique identifiers for creators, record your institutional code only.
Maintaining repository [Required]	Start typing the name of your institution and choose it from the drop-down list.
Institution identifier	Record the name of your institution here.
Other fields	Other fields that may be useful for administrative purposes.

Archival Descriptions

Add/Edit Archival Descriptions for a Fonds or Collection

To edit an existing description, search for the appropriate description. Once you have found your description, click on the title to bring up the full description. Click on the edit button at the bottom of the screen or on any header, and then a list of the various sections will appear. Click on the appropriate area (e.g. Archival description area, Notes area, etc.) to make necessary revisions. Always remember to save your changes by clicking the 'Save' button at the bottom of the page.

Before creating a new description, the related Authority Record must be in existence (see 'Add Authority Record' section for additional information.) Once this has been confirmed, then you can create a new archival description. To begin, click on the 'Add' menu (+ sign) at the top right-hand side of the menu of the edit site for *AOR*. Select 'Archival Description' from the drop-down list and you will see different headings. The majority of these headings are from RAD. Click on the title of each heading to expand the section and then complete your description by filling out the appropriate fields, ensuring that all of the required fields are completed.

NOTE: When entering new material into *AOR*, save your entries at the end of each section by clicking on the 'Save' button at the bottom of the screen. Be sure to save your data frequently. If you make an error when selecting an option from a drop-down list, click on the 'x' next to the item on the list you wish to delete. *AOR* will log you out if you leave your machine or are not entering data after a few minutes. Be sure to save your data frequently as you work.

Title and statement of responsibility area

Title proper [Required]	Enter the name of the person, family or corporate body responsible for the creation of the records, followed by the word fonds or collection.
General Material Designation	Select the General Material Designation at the highest level of description from the drop-down list: textual record, graphic material, etc.
Parallel titles and Other title information	Use if applicable.
Statement of responsibility	Used for item-level description only.
Title notes	Select 'Source of Title Proper' from the drop-down list, and type in "Title based on the contents of the fonds" or other appropriate information.
Level of description [Required]	Select the appropriate level of description from the drop-down menu; e.g. fonds, collection, series, file, item, etc.
Add new child levels	Used for adding child levels – see section on Lower Level Descriptions for additional information.
Repository [Required]	Start typing in the name of your repository and click on it to fill this field.
Identifier [Required]	Enter an unambiguous code used to uniquely identify the description. (This field displays to non-authorised users as 'Reference code' with your institutional code as a prefix.)

Edition area

	Use for item-level descriptions to record information about items that exist in two or more versions.

Class of material specific details area

	Use to describe particular aspects of architectural materials, maps or philatelic records.

Dates of creation area

Actor name [Required]	Use to link the previously created authority record with the archival description. Click 'Add New' and begin typing in the name of the creator. Click on the appropriate name when it appears in the drop-down list to establish the link to the proper authority record.
Event type	Select the type of activity from the drop-down list that established the relation between the authority record and the archival description; e.g. creation, accumulation, collection, etc.
Place	Start typing the location name in the Place taxonomy and choose the appropriate one from the drop-down list.
Date [Required]	Provide the date(s) of creation of the records being described either as a single date or range of dates (see RAD 1.4B and Appendix A of this manual for additional information).
Event note	Use if applicable.

Physical description area

Physical description [Required]	At all levels, record the extent of the unit being described by giving the number of physical units and their nature; e.g. 10 cm of textual records. -- ca. 40 photographs, etc.

Publisher's series area

	Use this area to record details about published material.

Archival description area

Custodial history	Use this field to record any changes of ownership of the archival materials. If the records were received directly from

	the creator, record that information in the Notes area under 'Immediate Source of Acquisition.'
Scope and content [Required]	Indicate the level being described (e.g. Fonds consists of… or Series comprises…) and give information about the scope of the records and their contents.

Notes area

Physical condition	Use if applicable.
Immediate source of acquisition	Use this field to enter information about the donor from whom you obtained the records.
Arrangement	Use if applicable to provide pertinent details about the arrangement of the material.
Language of material [Required]	Type in the first few letters of the appropriate choice (e.g. eng for English) and select it from the drop-down list. More than one language can be selected if required.
Script of material	Use if applicable.
Language and script notes	Use if applicable.
Location of originals	Use if applicable.
Availability of other formats	Use if applicable.
Restrictions on access [Required]	Use this field to record any restrictions on access. If there are none, type in: "There are no restrictions on access."
Terms governing use, reproduction and publication	Use if applicable.
Finding aids [Required if available]	Use this field to record details about finding aids, inventories, and file lists. Include links to online finding aids where available.
Associated material	If records in another institution are associated with the unit being described, make a citation to the associated material.
Related material	Use to create relationship between this description and another description of your institution in AOR. Begin typing the name of the related description, and select it from the drop-down list.
Accruals	Use to record details about accruals; e.g. "Additional accruals expected" or "No further accruals expected."
Other notes	Use if applicable.

Standard number area

	Use only at the item level for published materials with ISBN or ISSN numbers.

Access points

Subjects [Required]	Select up to 5 appropriate subject terms from the drop-down list (begin by typing the first few letters of the subject term.) See PAASH Instructions for details.
Place	Search for an existing term by typing in the first few letters of the term name and clicking on the appropriate place.
Name	The name of the creator of the materials is automatically added as an access point from the authority record. Select any appropriate additional name access points from the drop-down list by typing in the first few letters of the name (e.g. type Bro for Brown, Alan).

Control area

Description identifier	Use if applicable.
Institution identifier	Record the name of the institution responsible for creating or updating the description.
Rules of convention	Record the rules or conventions followed in preparing the description.
Status [Required]	Select Final, Revised, or Draft status of your description. Note that only descriptions with the status 'Final' will be published by DA and become available to the public.
Level of detail	Record whether the description consists of a minimal, partial or full level of detail.
Dates of creation, revision and deletion	Record the dates when the description was created or revised.
Language **Script**	Indicates the language used to create the description of archival material.
Sources	Record citations for any external sources used in the description (such as Scope and Content, Custodial History, or Notes fields).

Administration area

	This area displays when your description was last updated.

Add/Edit Lower Level Descriptions

AOR supports the description of materials at all levels; i.e. from the fonds or collection level down to individual items. From your fonds or collection description, add a lower level of description by clicking on the Title and Statement of Responsibility area. Once that section has been expanded, scroll down to the 'Add new child levels' field shown below.

Use the identifier field to record a unique reference number for the child description if used in your institution. Select the name of the level you wish to add from the drop-down list (Series, Item, etc.) and give it an appropriate title. Users can record date or date range for this specific child-level description here, or dates can be added later. Click 'Save' at the bottom of the screen to create your lower-level description. Lower-levels of description are displayed in the description tree on the left side of the screen as shown in the following example:

To edit a lower-level description, click on the title of the lower level description, then click the edit button at the bottom of the screen. Add information to the relevant fields and ensure that your changes are saved. Additional "children" can be added by going through the process outlined above.

NOTE: Do not enter the name of the repository or the name of the creator when creating lower-level descriptions (series, items, etc.), as this information is already contained in the higher-level (fonds or collection) description. Entering this information manually may slow down database performance. Complete the creator field in the lower-level descriptions only if the creator is different from that of the higher-level description.

Add/Edit Digital Material

Edit Digital Objects

To edit existing digital objects, first navigate to the item-level description. Click on the 'More' button at the bottom of the screen and select 'Edit digital material' from the list of options.

AtoM will load the 'Edit digital material' page and you can view:

- the Master (accessible only to authorized users) – should not be larger than 1 MB for images;
- the Reference representation (made available to public users for download); and
- the Thumbnail representation (used in the AtoM interface).

To delete the existing digital object, navigate to the bottom of the page and click on the 'Delete' button. You will be asked to confirm that you want to delete the digital file. Note that pressing delete will delete the object only, and not the description that it is attached to. To upload a new digital object to the item-level description, follow the instructions below for adding digital objects.

Add Digital Objects

Every digital object must be associated with an archival description, typically at the file or item-level. A digital object is generally added at the bottom of an item-level description; therefore, the item-level description must first be created.

From the bottom of the completed item-level description, click on the 'More' button in the bar at the bottom of the screen and you will see the following options displayed among others: 'Link digital object', and 'Import digital objects' as shown below.
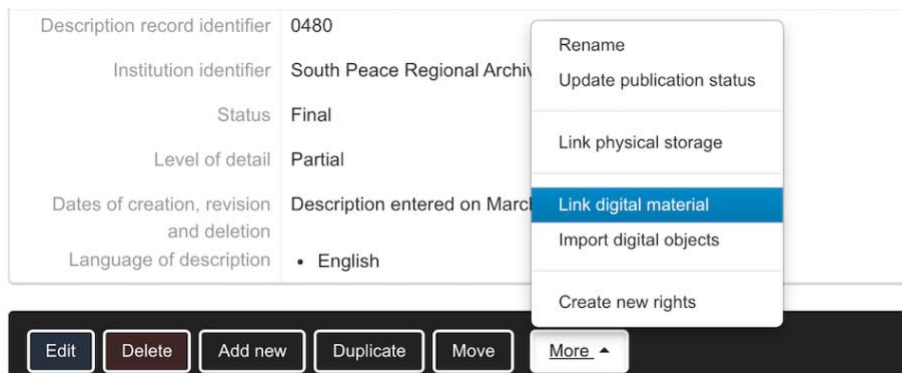
To upload a single digital object, click on the 'More' button shown above and select 'Link digital material'. Click the 'Choose File' button to navigate and select a digital object. Click 'Open' once the item has been selected. Click the 'Create' button in the button block and the reference display copy of the digital object should be displayed in the digital object field, above the other fields linked to that archival description.

To enable a rapid workflow where users can upload multiple digital objects without first having to create associated descriptions, there is an option to upload multiple digital objects at once, as children of a selected archival description. To upload multiple digital objects, click 'More', select the 'Import digital objects' option from the list and the following screen will appear:

Select a title that will be used for the placeholder archival descriptions that will be created for each object uploaded. The default title is image 01, image 02, etc.

Select the appropriate level of description from the drop-down list. Unlike the linking a single digital object option, which attaches the digital object directly to the archival description at that level, the 'Import digital objects' option requires the user to designate a level of description.

Click 'Select Items'. AtoM opens a browse window that will open a finder to the files on your computer. Select the files you wish to upload. When completed, click on the 'Import' button to import all the files. Once this has been completed, the lower levels will show up on the left-hand side of the screen when viewing the description.

NOTE: Lower resolution JPG files up to 1 MB each should be uploaded to *AOR*, rather than high-resolution images. For scanned documents with multiple pages (e.g. diaries, letters, etc.), PDF files should be created and uploaded for ease of display.

Appendix A: Date Formatting Examples

Examples:

> 1892
> 1926-1974
> 1902, 1926-1974
> [ca. 1890]-1956
> 1891-1939, predominant 1902-1924
> Microfilmed 1974 (originally created 1771-1774)

For uncertain or probable dates use the following guide:

[1867?]	probable date
[ca. 1867]	approximate date
[before 1910]	terminal date
[after 5 Jan. 1867]	terminal date
[between 1915 and 1918]	use only for dates fewer than 20 years apart
[197-]	decade certain
[186-?]	probable decade
[17--]	century certain
[17--?]	probable century

Appendix B: Subject Terms

In 2021, ASA adopted the Provincial Archives of Alberta Subject Headings (PAASH) for use in *AOR.* See PAASH Instructions document for details on how to assign PAASH subject headings. The previously existing subject Terms in *AOR* were replaced with analogous terms in PAASH with a few exceptions – old remaining terms are marked with an asterisk.

Appendix C: Additional Resources

- **AOR Manual**
  http://archivesalberta.org/doc/AOR_manual.pdf

- **PAASH Instructions for AOR**
  https://archivesalberta.org/doc/Using_PAASH_subject_access_points_in_AOR.pdf

- **Access to Memory wiki** (Release announcements, roadmaps, documentation, user lists, and project resources.)
  https://wiki.accesstomemory.org/

- **AtoM Introductory Webinar** (A video recording of a webinar conducted by Artefactual on March 5th, 2015. An introduction to online archival description and access using AtoM.)
  https://www.youtube.com/watch?v=kkPYSuSK77k

- **MemoryNS Video Tutorials** (Short videos that cover using AtoM to browse, search, create new descriptions, uploading digital objects.)
  https://www.youtube.com/playlist?list=PL225-3XEOQa8j0TRozdrD4_oZkwuvzMDe

- **Rules for Archival Description (RAD)**
  http://www.cdncouncilarchives.ca/RAD/RADComplete_July2008.pdf

- **ISDIAH: International Standard for Describing Institutions with Archival Holdings**
  http://www.ica.org/sites/default/files/CBPS_2008_Guidelines_ISDIAH_First-edition_EN.pdf

- **ISAAR(CPF): 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

- **ISAD(G): General International Standard Archival Description (ISAD[G])**
  https://www.ica.org/sites/default/files/CBPS_2000_Guidelines_ISAD%28G%29_Second-edition_EN.pdf