AtoM Training Worksheet

Contents

What is AtoM?

AtoM is a web-based, open source application that allows you to arrange, describe, and provide access to your content following national and international archival standards and best practices. AtoM is a multilingual application, supporting translation of both your content and the user interface. It also includes multi-repository support, so you can use AtoM as a union catalogue or portal site for many different institutions. Learn more by looking at the following introductory slide deck:

- http://www.slideshare.net/accesstomemory/introducing-access-to-memory

Getting started

By the end of these exercises you should be able to:

- Navigate through the major modules of the application
- Search and browse for the major entity types found in AtoM
- Create a new set of linked entities - archival description, authority record, repository
- Upload digital objects to a description
- Customize the look of an archival institution
- Make basic configuration changes via AtoM's settings
- Create new static pages and customize the menus found in AtoM's header bar
- Add rights to a description and manage access to digital objects via Rights statements
- Generate an archival description from an accession record
- Import an archival description
- Create new user accounts, user groups, and customize access permissions

Documentation

Throughout the training, we will be including links to the documentation with each training task. You can find all of AtoM's documentation here:
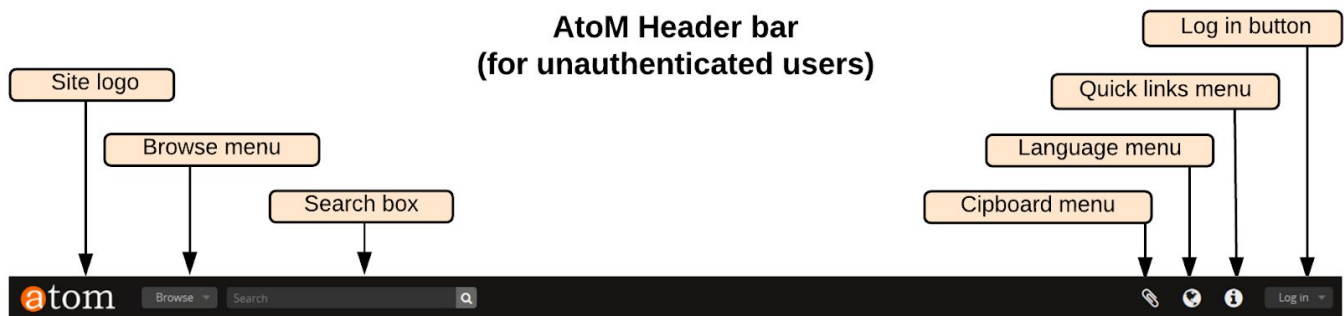
- https://www.accesstomemory.org/docs/latest/

The following exercises are text based, and therefore assume a bit of knowledge about archival terminology, or AtoM-specific terminology in some cases (though we have tried to reduce this). To aid with navigation and comprehension, here are 2 other documentation links that might come in handy - general information on Navigation, an introduction to the main entities in AtoM, and a Glossary of terms used throughout the documentation:

- AtoM Glossary of terms
- Introduction to main AtoM entity types
- Navigation in AtoM

Navigation overview

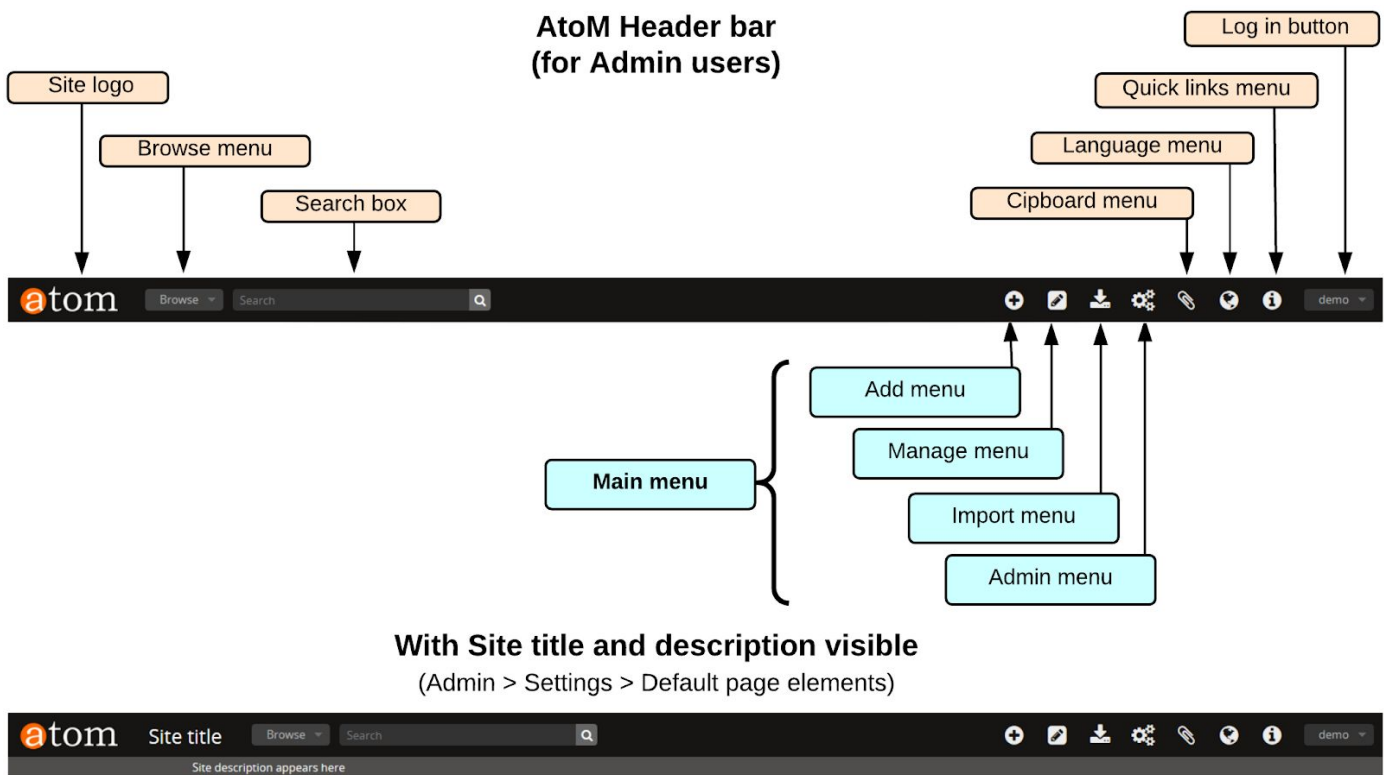Before we begin, here is a brief overview of the main navigation buttons in AtoM:

This is the view that most public (aka unauthenticated, or not logged in) users will see.

Once you log into the application, more menus will become available:

AtoM Header bar
(for Admin users)

Site logo

Browse menu

Search box

Log in button

Quick links menu

Language menu

Cipboard menu

Add menu

Manage menu

Main menu

Import menu

Admin menu

With Site title and description visible
(Admin > Settings > Default page elements)

Logging in to the application

All of the following tasks, except for Task #1, expect that you will be logged in. The login button is in the top right corner of the AtoM header bar (available on every page in AtoM), and the credentials for the Administrator account we will be using are:

- User: demo@example.com
- Pass: demo

For more information on logging in, see: Logging in documentation

You will be logged in as an Administrator - which means you will have access to all modules in AtoM's user interface. We'll be covering how to manage other User and Group permissions in task #12, below.

AtoM Exercises

Explore the AtoM Community

There are many other ways an AtoM site can be configured, and users can even develop custom themes that change the look and feel of the application. You can explore some other AtoM sites by following some of the links on our example Users page, on the AtoM wiki:

- https://wiki.accesstomemory.org/Community/Users

The AtoM User Forum is a great place to connect with other users, announce new AtoM related projects, share workflows and strategies, and/or seek community support for basic troubleshooting. You'll find it on the web here:

- https://groups.google.com/forum/#!forum/ica-atom-users

For more information about the AtoM User Forum, see:

- https://wiki.accesstomemory.org/Resources/User_forum

If you're looking for more resources, you'll find all our slides from previous conferences, webinars, and workshops available on our Slideshare account:

- https://www.slideshare.net/accesstomemory

Finally, if you're on Twitter, consider following us! We are @accesstomemory:

- https://twitter.com/accesstomemory

Let's begin!

# Task #1 – Search and browse (archival descriptions)

Description: To familiarize you with AtoM's search and browse interface, let's try a few searches, and then we'll see if you can locate specific content in our demo data. We'll look at how AtoM's global search bar will support Boolean operators such as AND, OR, and NOT, and how different facets and filters can be used to further refine your results.

Relevant documentation:
- Search documentation
- Browse documentation
- Advanced search documentation

Task:
- Place your cursor in the global search box
- Enter the search term `ontario` and press enter. How many results are returned?
- Let's add some complexity. Place your cursor back into the global search box. Now change the query to read: `ontario AND nickel AND NOT toronto` and press enter. How many results now? (Note - case matters for the Boolean search terms! Make sure that `AND` and `AND NOT` are capitalized)
- Above the search results, there is an option to limit the results to only those with digital objects (e.g. "6 results with digital objects. Show results with digital objects."). Click this. AtoM will limit the remaining results to only those that include a digital object.
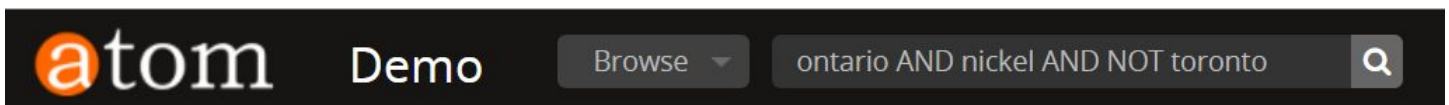
Note - you can always click on the Advanced search options above the results to reveal more filters available to refine your search.

Questions:
- Where is the hockey club from in the remaining results?
- Clear the search filters. How many videos are in the AtoM sample data? How did you figure this out?
- How many items created between 1900 and 1930 are marked as being under copyright?
- How many descriptions are held by the Yukon Archives?

Task #2 – Create a collection and link it to other entities

Description: creating descriptions and linking them to other entities (such as an archival institution, an authority record, a subject and place access point, etc) is one of the core activities in AtoM. In this task, we'll walk through creating a new description and linking it to other entities on the fly (aka without leaving the edit page). You will then be able to navigate to the new linked entities you've created and supplement those records with further information.

Relevant documentation:
- [Archival description documentation](#)
- [ISAD(G) template guidance](#)

Task:
- First make sure you are logged in to the application - the login button is in the top right corner, and the credentials are:
  - User: demo@example.com
  - Pass: demo
- Click on the "Add" menu (the **+** plus icon in the AtoM header bar) and select "Archival description"
- AtoM will open a new blank description template with all information areas closed. Click on any of the information area headers to make the section expand for data entry.
- In the **Identity area**:
  - Add an identifier and give your description a title
  - Give it a date of creation - the first date field is free text, where you can use typography to represent approximation or uncertainty. The Start and End date fields are not seen by public users - they expect ISO 8601 formatted dates (YYYY, YYYY-MM, or YYYY-MM-DD) and are used for date range searching. For further details, see the diagram below:

Date(s) *

Type	Date	Start	End
Creation	[ca. 1980] - 199-?	1980-01-01	1999-12-31	×

Add new

startDate   **endDate**

Display date (what the public user sees)
Can use typography to represent approximation or uncertainty

Internal ISO-8601 formatted date fields for searching
Use: YYYY, YYYY-MM, or YYYY-MM-DD format

- o Choose "Collection" from the levels of description drop-down menu
- o Using the "Add new child levels" widget, add 2 item level descriptions
- o Leave the Extent and medium field empty for now.
- ● In the **Context area**:
  - o Let's link to an existing authority record. Place your cursor in the "Creator" field and wait a moment. You'll see results start to appear. Start slowly typing "wain" until you see "Wainwright, Andy" appear in the drop-down menu - click on it to select that as our creator.

Context area

Name of creator(s) *

Wain

Wainwright, Andy

- o Note that another Creator field will appear after you have linked to Andy Wainwright. Now let's create a new authority record on the fly, without leaving this edit page. Enter your own name in the new Creator field that has appeared!
  - o The Repository field is also an autocomplete, where you can either select an existing Archival institution, or create a new one on the fly. In the Repository field, let's create a new repository - enter whatever you'd like
- ● In the **Content and structure area**:
  - o Add a scope and content to your description
- ● In the **Access points area**:
  - o The subject, place, and genre access point fields are all autocomplete drop-downs, similar to the creator and repository fields above. See if you can select one existing term, and create one new one on the fly, for each access point type: subjects, places, and genres.

- When you're ready, scroll to the bottom of the page, and click the "Create" button. AtoM will save your description, and create stub records for each of the new entities we created on the fly from within the archival description edit template (so we can navigate to them and supplement them later). You'll be redirected to the view page for your description so you can review your work.

Cancel   Create

Questions:

- Where is the biographical history for Andy Wainwright that now appears in your description coming from? Can you add one for yourself?
- Can you find the child item records you created? If so, navigate to them. You can always enter edit mode to supplement them if you want. What happens if you hover over the repository name on the item record?
- We left the Extent and medium field blank during our task, but ISAD(G) considers this a mandatory field. What do you see when you save the record?
- Can you change the creator and the repository on a description? What happens?
- If you re-enter edit mode, you can open the Administration area near the bottom of the template and, using the "Display standard" field, you can change which standard template is used to show your description. Try changing this to some of the different standards. What changes? Can you identify any fields that don't display in a different standard? (Note: after playing with this, we recommend changing it back to ISAD for the rest of the training exercises).

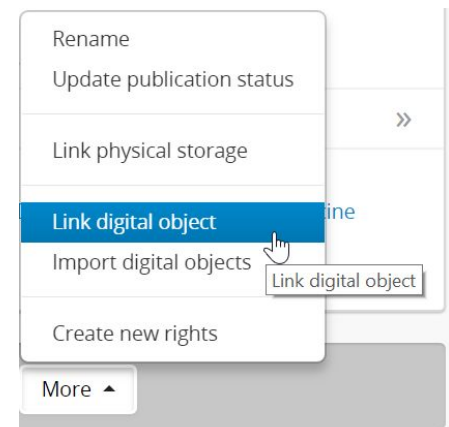# Task #3 – Add digital objects

Description: In Task 2, we created a new description with 2 child records. Now, we'll link digital objects to these. First, we will upload a local digital object. For the second item-level description, we will link a digital object available on the web via URL.

Relevant documentation:
- [Upload digital object documentation](#)

Task 3a - link a locally uploaded digital object to a description

- First, let's make sure you have a reasonably small JPG image available on your computer to test the upload. If you'd like to use one of our samples, you can find some in the "Digital objects" directory of the sample training materials, available at: http://bit.ly/AtoM-training. Download one of these to your desktop for use later.
- Navigate to one of the item-level child descriptions you created during task 2
- In the "More" button menu at the bottom of the page, select "Link digital object"
- AtoM will redirect you to an upload page - click on the "Choose file" button and use the file manager window provided to select the JPG you want to upload from your computer
- When you've selected the file, click the "Create" button at the bottom of the page.
- AtoM will upload the digital object, generate 2 derivatives for use in the application (a reference display copy for the description view page, and a thumbnail for use in search and browse results), and redirect you to the description's view page so you can review the file upload

Task 3b - link a digital object from the web via URL

- Use the treeview on the description to navigate to the other item-level description.

- In another browser tab, use Google or another image search to find an image online you'd like to link to your description (we recommend puppies, kittens, or bunnies for this exercise)
- When you've found a suitable image, we need to get to the file path that leads directly to the file - i.e. the URL that includes the file extension. Generally, you should be able to right-click on the image and select an option such as, "View image," or "Open image in new tab." To be able to link a digital object via URL in AtoM, the online digital object must:
  - Be publicly available on the world wide web - there must be no password restriction, login requirements, firewalls, or other barriers to access
  - Be available via HTTP or HTTPS - FTP links will not work for URL-based file uploads
  - The URL must end in the file extension - e.g.
    - Will work: http://www.example.com/bunny.jpg
    - Will not work: http://www.example.com/bunny
- When you have the URL of the image (including the file extension), scroll down to the bottom of the page on your description, open the "More" menu in the button block at the bottom of the page, and select "Link digital object."
- AtoM will redirect you to the upload configuration page.
- In the URL field, paste the URL to your image, and then click the "Create" button at the bottom of the page.
- AtoM will upload the digital object, generate 2 derivatives for use in the application (a reference display copy for the description view page, and a thumbnail for use in search and browse results), and redirect you to the description's view page so you can review the file upload

Questions
- Navigate back up to the top level description. What has changed?
- Consult the documentation - can you figure out how to:
  - Add a different thumbail or reference display image to your digital object?
  - Delete one of your digital objects?
- What happens when you upload one of the audio or video samples in the Training materials?
- What happens if you upload something like a CSV file, where there is no obvious thumbnail that can be generated?

Task #4 – Create a relationship between two authority records

Description: AtoM allows you to create links between authority records, and qualify these relationships with further information, including type of relationship, dates, and notes. By the end of this task, you should be able to link two authority records together.

Relevant documentation:
- [Authority record documentation](#)
- [Creating relationships between authority record](#)s

Task:
- Using the Browse menu, navigate to the Authority records and select an authority to which you would like to add a relationship.
- Once you are on the authority record's view page, click on the Edit button in the button block at the bottom of the page to enter edit mode.
- Navigate to the Relationships area, and click the header to expand the section.
- Under "Related corporate bodies, persons, and families," click the Add new button

Relationships area

Related corporate bodies, persons or families					
Name	Category	Type	Dates	Description	
Add new					

- AtoM will open a pop-up dialogue window. Let's fill it out:
  - The first field is an autocomplete where you select the target related authority record. If you know the authority record you want to link, begin typing the authorized form of name - the autocomplete dropdown will update to display matching results. Otherwise, feel free to pick any authority record.
  - The *Category of relationship* field is a drop-down menu with 4 options - associative, . These are drawn from the ISAAR-CPF international standard for authority records. ISAAR gives the following definitions for each category:

- **Hierarchical** (e.g. superior/subordinate; controlled/controlling; owner of/owned by): In a hierarchical relationship an entity may exercise some authority and control over the activities of a number of other corporate bodies, persons or families. An entity may also be subordinate to a number of other corporate bodies, persons or families, as for example a joint-committee or an organization whose superior changed over time.
- **Temporal** (e.g. predecessor/successor): In a temporal relationship an entity may succeed a number of other corporate bodies, persons or families in exercising some functions and activities. In turn it may be succeeded by a number of other corporate bodies, persons or families.
- **Family:** In a family a person may have a wide circle of relationships with other members of the family and with the family as an entity. Where the genealogical structure of the family is complex it may be appropriate to create separate authority records for each member and link them to parent(s), spouse(s) and child(ren). Alternatively this information may be recorded in the Internal structures/Genealogy element (5.2.7).
- **Associative:** An associative relationship is a general category for relationships not covered by any of the above (e.g. Provider/client, membership, part/whole, business partner).

- Once you have selected a Category of relationship, AtoM will update the values available under the *Relationship type* drop-down menu. Select the relationship that is most appropriate - or optionally, you can leave this field blank.

- Add a description in the *Description of relationship* free-text field.
- If desired, add dates to the Dates of relationship fields. These work similar to the date fields in archival descriptions - there is a free-text display date field where

typographical marks and special characters can be used to express approximation or uncertainty, and two controlled fields for start and end dates, which both expect values in ISO 8601 format (YYYY-MM-DD, YYYY-MM, or YYYY).

● When you're satisfied with the data you've entered, click the Submit button. AtoM will close the pop-up dialog and return you to the authority record's edit page.

Relationships area

Related corporate bodies, persons or families					
Name	Category	Type	Dates	Description	
Wilfrid Laurier University	temporal	is the successor of Waterloo Lutheran University	1973	In 1960, the Lutheran church relinquished its sponsorship of Waterloo College. On November 1, 1973, Wilfrid Laurier University was established with Royal Assent by the Lieutenant Governor of Ontario Ross Macdonald, who later served as Laurier's Chancellor.	✎ ✕
Waterloo Lutheran Seminary	associative	is the associate of Waterloo Lutheran University	1960 - 1973		✎ ✕

● Scroll to the button of the edit page and click the Save button. AtoM will redirect you to the authority record's view page so you can review your work.

Questions

● On the view page of the authority record you've modified, the related authority record should be displayed as a hyperlink. What do you notice if you click through and view the related authority record?

● Try some of the other relationship types, such as *Family > Is the parent of*, or *Hierarchical > Is the superior of*. What do you notice about how the relationship is defined on the related authority record?

● Using the Terms documentation, can you figure out how to add new Relationship types with a converse and/or self-reciprocal relationship?

# Task #5 – Edit and theme a repository

Description: In task 2, we created a new repository simply by entering a new repository name in the edit page of a new archival description. At this point your new repository (AKA archival institution) only has a name, however. In this task, we'll have the opportunity to supplement it a bit. AtoM will also allow users to upload custom logos and banners to a repository page, choose a custom background color, and even add some custom HTML and inline CSS content at the top of the page if desired. At the end of this task, you should have at least a logo and a custom background color added to your new repository record.

Relevant documentation:
- [Archival institutions documentation](#)
- [Browse archival institutions documentation](#)
- [Search archival institutions documentation](#)
- [Archival institution theming documentation](#)

Task 5a - edit the repository record:

- If you're still on the view page of the archival description you've created, you can click the hyperlink in the body of the record to the repository - AtoM will redirect you to the archival institution's view page. Alternatively, you can use the browse menu in AtoM header bar to navigate to the archival institution browse page, and then either browse or search for your repository. Navigate to the view page for the archival institution you want to edit.
- Let's supplement our archival institution record a bit first. In the button bar at the bottom of the page, click the Edit button to enter edit mode. AtoM will open the repository record with all information areas closed - click on one to expand it and supplement it.
- In the **Identity area**:
    - o Add an identifier for your repository record
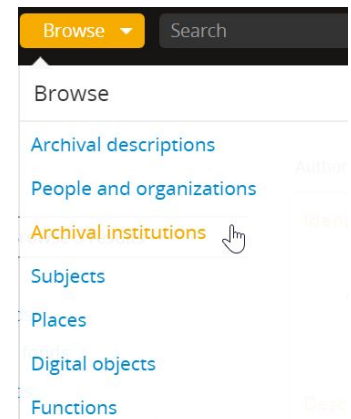
- In the Type field, choose one of the existing repository types. The field is an autocomplete - you can begin typing to narrow the list down or reveal more options, and then select from the drop-down menu that appears.
- In the **Contact area**:
  - Click the "Add new" button to add an address. Make sure you include a city/town/locale and a country under the Physical location tab of the contact information pop-up.
- Feel free to supplement a few of the other fields in the other areas as well
- In the **Access points area**:
  - In the Thematic area field, add one existing access point and one new access point using the autocomplete drop-down.
- When you're ready, click the "Save" button at the bottom of the edit page. AtoM will redirect you to the view page for your archival institution record so you can review your changes.

5a Questions:
- What other changes can you identify on the view page after you added and saved your repository contact information?
- Can you find where the relationship to the archival description you linked to this repository is displayed on this view page?
- Let's return to *Browse > Archival institutions*. What effects have the information you added to your repository record had on the browse options available on this page (e.g. the facets and filters)? Test out a search for your repository as well based on some of the information you've added. How could you supplement your repository record further to help users discover it?
- Now let's return to the linked archival description you created. Take a look at the identifier as it is now displayed on your description - what has changed? Where is this information coming from? (Hint - you can check out some documentation [here](#))

Task 5b - Add some basic theming to your repository record

For this task, we'll need a banner and a logo. In AtoM the requirements for these are:

- Banner: PNG format, no larger than 800px width by 300px height, file size no larger than 256k
- Logo: PNG format, no larger than 270px by 270px, file size no larger than 256k

You can either create your own test images (so long as they conform to the recommendations above!), or you can use some of the samples we've prepared - there is a folder in the following directory named "Repository logos and banners" with some materials you can download:

- bit.ly/AtoM-training

Let's begin!
- From the archival institution view page, click the "Edit theme" button in the button block at the bottom of the page. AtoM will redirect you to an edit page
- In the Style area, click into the "Background color" field - AtoM will display a color palette. Use the slider on the right to select a hue, and refine the tone with the palette
- Use the Browse button in the Logo area to select a logo from your local computer for upload
- In the Page content area, try adding the following code to the "Description" field:
  - ```
    <iframe width="670" height="400"
    src="https://www.youtube.com/embed/kkPYSuSK77k" frameborder="0"
    allowfullscreen></iframe>
    ```
- When you are ready, click the "Save" button at the bottom of the page. AtoM will apply your changes and redirect you to the archival institution's view page so you can review your work.

5b Questions:
- Return to the view page of the archival description you have linked to this repository record. What has changed?
- How might you use the custom "Page content" part of the theming in your institution - what else might we add to this area?

Task #6 – Change some general settings in AtoM

Description: AtoM is a highly customizable application. In this section, we will look at some of the basic changes you can make to your site via the general settings. We'll barely scratch the surface of all the settings available, but it should give you a sense of what's possible.

Relevant documentation:

- [Settings documentation](#)

Task 6a - change some Global settings:

- Using the main menu located in the AtoM header Bar, open the Admin tab (the gears icon) and select "Settings." AtoM will redirect you to the Settings page. By default, it will display the Global settings first - you can view other settings pages using the navigation menu on the left, but for now, we're going to change some of the Global settings.
- Change the value of the "Results per page" from 10 to 20.
- Change the "Inherit reference code" setting from yes to no
- Change the Treeview type setting from "full-width" to "sidebar"
- Change the Default repository view setting from "card" to "table"
- Scroll to the bottom of the page and click Save.

DIP upload
Default page elements
Default template
Digital object derivatives
Finding Aid
Global
I18n languages
Identifiers
Inventory
Markdown
Permissions
Privacy Notification
Security
Site information
Treeview
User interface labels

6a Questions:

- Return to the archival description you created in task 2. What has changed (hint - it's not just the treeview)?
- To explore the full-width treeview with a larger descriptive hierarchy, change it back in the settings to full-width, then locate the "Kantokoski (Koski), Koivula & Korpela Family" fond, and try:
  - o Using your keyboard keys to navigate the full-width treeview - can you figure out how to open and close folders with child records beneath them?
  - o Clicking on a different description in the treeview to see how the page loads the description below immediately

- Navigate to *Browse > Archival institutions*. The default view has changed! Can you figure out how to flip it back to the card view on the browse page?

Task 6b - Change the site information and default page elements

- Return to *Admin > Settings* and, using the menu on the left of the page, click on the "Site information" tab. AtoM will reload the page to show the related settings.

Site information

Name	Value
Site title	Demo
Site description	AtoM 2 demo site, hosted by Artefactual Systems
Site base URL (used in MODS and EAD exports)	http://demo.accesstomemory.org

- Change the site title and the site description, and click Save.
- Use the menu to navigate to the "Default page elements" settings.
- Uncheck the settings for the Logo, the Language menu, and the Digital object carousel
- Check the setting for the Description
- Click the "Save" button. AtoM will reload the page and apply your changes.

6b Questions:
- What has changed with the AtoM header bar?
- Return to the "Kantokoski (Koski), Koivula & Korpela Family" fonds we looked at as part of the questions for Task 6a. What is different?
- Can you figure out what the settings for the "Copyright status filter" and the "General material designation filter" in the Default page elements settings do? (Hint: it has to do with search.)
- What happens if you add a really long site title when the title is shown in the header bar? (hint: it's not good)

Task 6c - Enable the inventory list

- Let's return to *Admin > Settings*. Using the settings menu on the left side of the page, select the "Inventory" option - AtoM will reload the page to display the inventory settings
- The page displays a list of the levels of description - you can multi-select in this list by holding down the Ctrl (or Command on a Mac) key while clicking.
- Choose some of the lower levels of description to include - File, Item, Part, Subseries, etc. Save your changes.
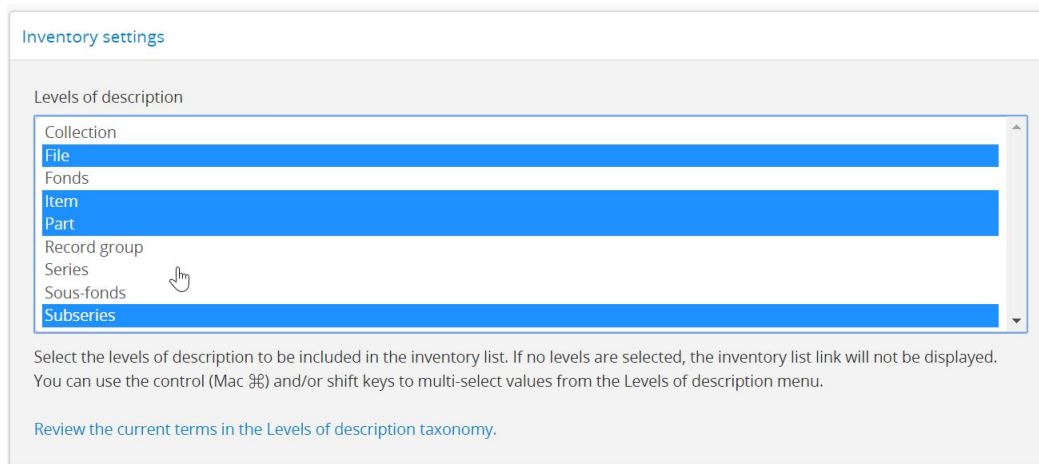
- Navigate to an archival description that includes lower-level child records with a level of description that matches one of the choices you made in the inventory settings. For example, you could return to the "Kantokoski (Koski), Koivula & Korpela Family" fonds we looked at as part of the questions for Task 6a and 6b.
- There will be a new link in the "Explore" section of the right-hand menu next to the top-level description, called "Inventory" - click on it
- AtoM will take you to the inventory list, which can be used to browse lower-level descriptions in a table-based view.

6c Questions:

- What happens when you click on one of the blue column header titles in the Inventory list? What if you click it more than once?
- How might a list like this be useful to a researcher? How does it differ in use from returning to the top-level description and clicking the "Browse as list" option in the right-hand context menu instead?

Task #7 – Working with static pages and menus

Description: AtoM includes a Static pages module where users can add new blank pages and then customize the content with text or HTML and in-line CSS. Additionally, all of the menus in AtoM are customizable so you can add or delete items from each menu, and change their path or display name. In the following exercises, we will create a new static page and then add it the Quick links menu in the AtoM header bar (the **i** icon).

Relevant documentation:

- [Manage static pages documentation](#)
- [Manage menus documentation](#)

Task 7a - Creating a new static page

- Open the Admin menu in the AtoM header bar (the Gears icon), and click on "Static pages." AtoM will redirect you to the Static pages module.
- Click the "Add new" button in the button block at the bottom of the page listing the current Static pages. AtoM will reload the page and display an edit template to add a new Static page.
- Let's add some data:
  - In the "Title" field, give your page a title - this will be the display text for the page.
  - In the "Slug" field, we will create a slug (or permalink) for the page - this is the unique part of the URL. Because it will be part of a URL, it should not include spaces (use dashes instead), special characters, or capitalization. Here's an example: If your new static page is called "Help With Searching!" then you might use `help-with-searching` as your slug.
    - **Note**: Slugs must be unique in AtoM. If you use a slug that is already in use elsewhere in the application, AtoM will append a dash and an incremental number to the end of your chosen slug. We're going to need to know the slug when we add it to a menu in task 8b, so make sure you check after saving!
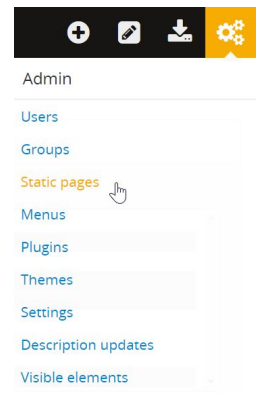
- The "Content" field is where we can add either raw text, or use HTML and inline CSS to style our content. Try it out! We've included some samples of what you can try in our documentation here: Styling static pages.
- You can always save the page to preview the results, and then re-enter Edit mode (by clicking on the "Edit" button) to continue editing. When you are satisfied, save your page. AtoM will take you to a view page where you can review your work.

7a Questions:
- How might you use Static pages in your institution?
- Can you embed a YouTube video into your static page? What about a map? An image from the internet?
- The AtoM home page is just a special type of Static page, with additional side menus added. Try customizing your home page using these same techniques.

Follow-up activity:
Explore some of the creative ways that our user community has made use of the Static pages module. For example, see:

- Simon Fraser University's guide to finding aids
- The Beaton Institute's Project pages
- The City of Vancouver Archives' Search help page
- The Borthwick Institute's Glossary of archival terminology
- The Mills Archives guided overview of site holdings

Can you find any more interesting uses of the static pages in the example sites listed on our AtoM Users page?

Task 7b - Add a Static page to the Quick links menu

We've created a new static page in exercise 8a, but right now, no one can find it unless they know the URL. Let's add it to the Quick links menu (the **(i)** icon in the the AtoM header bar).

- Click on the Admin menu (the gears icon) in the AtoM header bar to open it, and select "Menus." AtoM will reload the page and display the Menu module.

- Scroll down to the bottom of the page, and click on the "Add new" button. AtoM will open a new Menu edit page.
- Let's add some data:
  - In the "Name" field, we want to add an internal field name for our menu item. This internal name will not be visible to users - we'll add a Label later for that. The name should not have any spaces or special characters in it - if you return to the Menu page, you'll see that we've typically used what is sometimes known as [camelCase](#) - writing out the title with no spaces. For example, if my static page was called "Help With Searching!" and now I want to make a menu link for it, I might add the name as `helpWithSearching`
  - In the "Label" field, add the display title that you want users to see in the menu
  - The "Parent" drop-down menu allows us to select the top-level menu to which we want to add our new menu item. It is a hierarchical representation of the menus and their child options. Scroll down until you see the option for "-quickLinks" and select it.

Add new menu

Main area

Name *
`helpWithSearching`

Label
`Search help`

Parent *
`- quickLinks`

Path *
`/help-with-searching`

Description
`Page with help text for end users on how to perform searches in AtoM.`

  - The "Path" field is where we'll need to know the slug from our static page. We'll add a / slash character before our slug to separate it from the base URL of the AtoM site - so if the slug of your static page was help-with-searching then add /help-with-searching to the Path field.
  - The "Description" field is not mandatory - it's mainly useful to remind yourself or a future administrator what the menu item is, and what it is used for. Add a description if you wish.
- When you're done, click the "Create" button at the bottom of the page. AtoM will return you to the Menu list page. You should now see a new menu item under the Quick links menu, and clicking it should take you to the static page we created in Task 8a.

7b Questions:
- Based on what you've learned, see if you can figure out how to do the following:
  - Change the "Archival institutions" link in the Browse menu to read "Repositories"
  - Remove the "Function" link from the Add menu and the "Functions" link from the Browse menu

Task #8 – Add rights to a description

Description: AtoM has the ability to add PREMIS-based rights statements to a description, to track restrictions based on copyright, donor agreement, statute, license, or other factors. You can also add rights to a top-level record and then use the rights management functionality to inherit those rights at lower-levels (all lower levels, or just those with digital objects). This task will walk you through basic rights statement creation. Let's add some rights to the description we created in Task 2!

Relevant documentation:
- [Rights documentation](#)

Task 8a - Add a new rights statement:
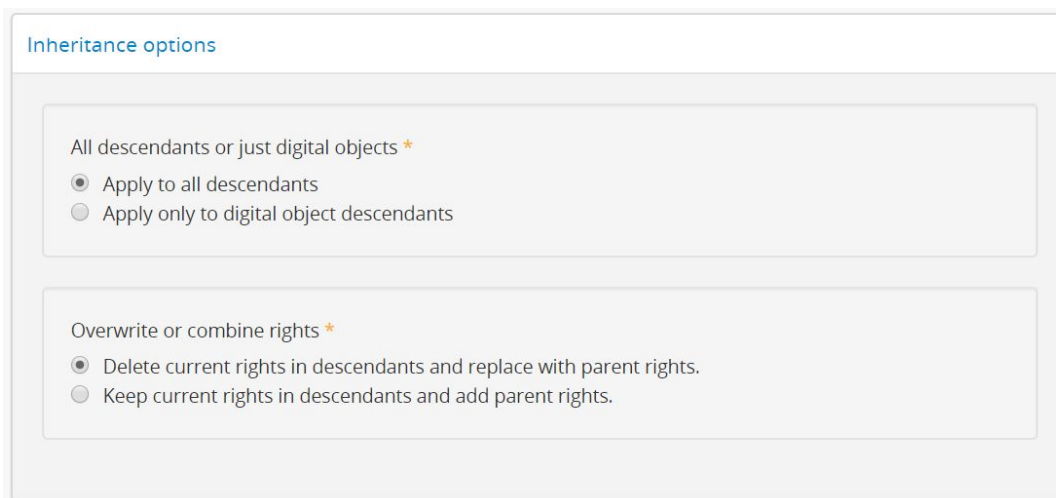
- Navigate to the top-level description we created during Task 2. You can use the Browse menu, or the search box to locate your description
- Once you're on the view page of your description, scroll to the button block at the bottom of the page, open the "More" menu, and click on "Create new rights."
- AtoM will redirect you to an edit page for a new Rights statement. First, we'll select a basis for our Rights statement from the drop-down menu at the top of the edit page. For this exercise, let's select "copyright" - but you can play around with the others as well. Some of the fields in the form will change depending on the basis you choose.
- Fill in as many or as few of the fields as desired in the Basis section.
  - The Rights holder field is an auto-complete drop down, linked to Rights holders in AtoM. You can select an existing Rights holder, or enter a new name (note: Rights holder records can be supplemented later via *Manage > Rights holders*)
- Near the bottom of the form, there is the Act / Granted rights area.
  - The "Act" data entry field is a drop-down list. You can select: Delete, Discover, Display, Disseminate, Migrate, Modify, and Replicate. For this exercise, let's select "**Disseminate**"
  - The "Restriction" data entry field provides three choices: Allow, Disallow or Conditional.
  - Add Start and End dates for the right. Leave the end date blank if it is unknown or open.
  - You can add notes related to the granted right.

- Once you've finished adding data to the edit template, click the "Save" button at the bottom of the page. AtoM will redirect you to the related description's view page, and your rights statement should appear near the bottom of the page.

Task 8b - Manage rights inheritance

- Return to the button block at the bottom of the page, open the "More" menu, and you should now see another option - "Manage rights inheritance." Click it.

| Rename |
| Update publication status |
| Link physical storage |
| Link digital object |
| Import digital objects |
| Create new rights |
| **Manage rights inheritance** |
| More ▲ |

  - ○ NOTE: you won't see this option if your description does not have any child records! To be able to inherit rights at lower levels, there need to be lower levels present below the current description.
- AtoM will redirect you to a configuration page. Here you can decide:
  - ○ If you want the rights record(s) inherited by all descendants (children) or only descendants with digital objects associated with them and,
  - ○ Whether you would like to delete any rights which pre-exist in the child records and replace with the parent rights (option 1) or combine the parent rights with any existing rights in the child records (option 2).
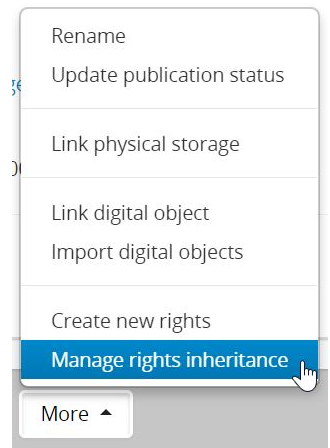
Inheritance options

All descendants or just digital objects *
- ● Apply to all descendants
- ○ Apply only to digital object descendants

Overwrite or combine rights *
- ● Delete current rights in descendants and replace with parent rights.
- ○ Keep current rights in descendants and add parent rights.

- For this exercise, the choices don't matter - both lower-level descriptions should have digital objects after Task 3, and there are no pre-existing rights statements to be overwritten. Feel free to experiment with these options on other descriptions!
- When you have configured your choices, click the "Apply" button.

- AtoM will launch a job via the job scheduler, and the lower-level descriptions will be updated asynchronously in the background as you continue to work. You can visit **Manage > Jobs** to see the status of the job, or just wait a moment, and then navigate to your lower level descriptions - they should now have the same rights statement as the parent!

Manage jobs

All jobs   Active jobs

Start date	End date	Job name	Job status	Info	User
2018-08-27 12:41 PM	2018-08-27 12:41 PM	Inherit rights	✅ Completed ↪	Children inheriting rights from record: Women's College Hospital. Division of Dermatology fonds Full report	demo

Questions:

- If your descriptions are published, try logging out and looking at them. What do you notice?
- Can you create a new rights statement with a "Donor" basis, and use rights inheritance to replace your previous rights statements?
- Log back in and return to your rights statement. You will notice in the edit page that one Right basis can have multiple acts / granted rights associated with it. Add another Act to your existing rights statement, using the "Display" act.

Task #9 – Using rights to restrict access to digital objects

Description: AtoM can use the rights statements attached to descriptions with digital objects restrict public access to the master digital object, and/or any of the derivatives. In place of the digital object, a customizable access statement can be shown, so public users know that a digital object exists even if they do not currently have permission to access it. These customizable access statements can include steps required (such as contacting the Reference Archivist, etc.) for users to gain access to the restricted materials, now or in the future. Restricting access is managed via the settings - AtoM currently has the ability to make one Act type actionable (delete, discover, display, disseminate, migrate, modify, and replicate are the default Acts available). In this exercise, we will review the settings, customize our access statements, and learn how to restrict digital object access based on our PREMIS rights statements.

Relevant documentation:
- [Making rights actionable on digital objects](#)
- [Configuring the Access statements](#)

Task - Configuring digital object permissions based on Rights:
- Navigate to *Admin > Settings*, and click on Permissions in the side menu
- AtoM will display a configuration page that allows you to determine what Rights statements will restrict digital objects, and what version of the digital object (master digital object, reference display copy, and/or thumbnail) will be restricted.
- The first field determines which PREMIS Act will be made actionable. At this time, you can only make one Act type actionable. This is a drop-down menu - let's select the same Act type as the rights statements you added in Task 7
- We can now use the grid of checkboxes below to configure permissions for each Rights basis (e.g. Copyright, Statute, Policy, Donor, License, etc), and for each digital object derivative (the master digital object, the reference display copy visible on view pages, and the thumbnail visible in search and browse results).

- ○ Let's configure the permissions for Copyright: uncheck all the boxes grouped under the "Disallow" and "Conditional" headings. Check all the boxes under "Allow."
  - ○ Feel free to configure the other permissions however you want! We suggest trying different configurations, and then creating some additional Rights to test them all out.
- In the PREMIS access statements area below, modify the custom access statements. This is what will be shown to public users when access to a reference display image is restricted.
- When you've configured everything, remember to scroll to the button block at the bottom of the page and click "Save."
- If your description has a Rights statement with the same Act as the one you've configured in Settings, and the restriction is set to Disallow or Conditional, then access to the attached digital object and/or its derivatives will now be restricted based on your settings. If your description is published, you can log out and test this now.

Questions

- When logged out, what do you see in place of the digital object in the search and browse results?
  - ○ Try repeating this process with different types of digital objects - e.g. a sound file, a video file, a PDF. What changes?
- When logged out, what do you see in place of the digital object on the related description's view page?
- How might you use this functionality in your institution? How can it be combined with the "Manage rights inheritance" workflow described above in Task #7b?

Follow-up activity

The Advanced search panel includes a filter that will return descriptions based on Copyright PREMIS rights statements attached to the archival descriptions. Add a number of different types of Copyright statements (use allow, disallow, and conditional settings) to your descriptions, and then explore how this filter works and what results are returned with each option in the drop-down menu.

Task #10 – Generate an archival description from an accession record

Description: Many archivists will use AtoM's accessions module to inventory and gain intellectual control over new archival materials received or acquired by the institution. AtoM will allow you to create basic accession records, capture donor contact information, add accrual and deaccession records, and even generate an archival description from an accession record, which you can then supplement with further information. In this exercise, we will work with an existing accession record and try generating an archival description from it.

Relevant documentation:
- Accession record documentation
- Publish an archival description documentation

Task:
- In the AtoM header bar, click on the Manage menu (the pencil icon), and click "Accessions." AtoM will redirect you to the Accessions browse page.

- Click on the "McPhee Goldmining Collection." AtoM will take you to the view page for that accession record.
- At the bottom of the page, click on the Edit button to enter edit mode. AtoM will take you to the edit page for the McPhee Goldmining Collection
- In the Administrative area, let's add a creator, some dates of creation, and some data in the "Appraisal, destruction and scheduling" field. When you're done making your edits, scroll down and click the Save button at the bottom of the page. AtoM will take you back to the accession record's view page so you can review your changes

- We're ready to generate an archival description from this accession record! In the button block at the bottom of the page, click the "Create Archival description" button.

- AtoM will create a description from the accession and redirect you to the view page - take a good look at what information came from the accession record, and what information is not present.
- Click the Edit button at the bottom of the page and supplement your new description - link it to the repository you created, give it an identifier, and make any other changes you desire. Save your changes.
- Let's publish our description so it is publicly visible. Click on the "More" button at the bottom of the page, and select "Update publication status," and then change the description from Draft to Published and submit your changes by clicking the "Update" button. AtoM will return you to the archival description.

Questions:
- How is the link to the accession record displayed on the archival description we generated? How is it displayed on the accession record?
- What fields were carried over from the accession record when you generated an archival description?
- Try logging out and then returning to the archival description - what is **not** displayed?
- Can you figure out how to link an accession to an archival description that has already been created? (Hint: if you're stuck, check the documentation)

Task #11 – Import an archival description

Description: AtoM includes the ability to import many different entities in XML and CSV formats. In this exercise, we will try importing a simple archival description using the 2.3 ISAD CSV sample. You can find this sample on the AtoM wiki (here), and samples are always included within AtoM's code as well at `lib/task/import/example` - for example, see them here in our GitHub code repository for the 2.4 release. You can also find a sample in the training materials provided for this workshop in AtoM > CSV templates - the file we want is called `example_information_objects_isad_2.3.csv`:

- http://bit.ly/AtoM-training
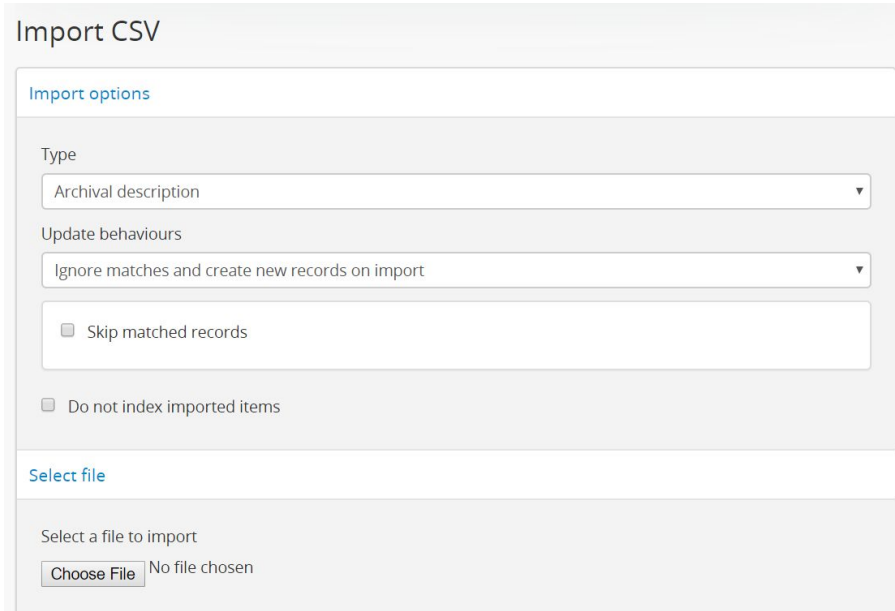
Relevant documentation:
- CSV import documentation
- CSV - archival descriptions import via the user interface documentation

Task:
- Using the main menu in the AtoM header bar, click on the Import menu (the icon with the down-facing arrow in it), and select "CSV." AtoM will redirect you to the CSV import page.

- Make sure the "Type" drop-down menu is set to "Archival description"
- Click the Browse button to select your CSV from your local computer. Choose the AtoM 2.3 ISAD CSV import example template.
- When you're ready, click the Import button at the bottom of the page.

- AtoM will begin the import process, and when it is complete, it will give you the option to Browse archival descriptions so you can find and review your content. Your new archival description should be near the top of the list, called "Example fonds." View the new archival description created.

Questions:

- Where did the image come from? Can you locate where it is in the CSV you uploaded?
- Try editing the CSV - change the title, repository, identifier, and/or other values, and re-import it as a new description.
- Edit the archival description - in the Administration area of the edit page for your description, change the Display standard from ISAD to another standard, and save. Notice what information remains, and what is hidden. Can you see how the templates are crosswalked internally? What happens to the hidden information if you change the standard display template back to ISAD(G)?

Follow-up activity:

Did you know that you can use a CSV import to update some of the descriptive fields in AtoM? See

- https://www.accesstomemory.org/docs/latest/user-manual/import-export/csv-import/#update-existing-descriptions-via-csv-import

Try editing your CSV again, and import is as an update this time. What works, and what doesn't?

Task #12 – Manage Users, Groups, and Permissions

Description: AtoM allows you to customize permissions for users, or groups of users, in a highly granular manner. This exercise will introduce you to AtoM's permission module as we create a new group, add a new user to that group, and then add some custom permissions.

Relevant documentation:
- [Managing users and groups documentation](#)
- [Editing permissions documentation](#)

Task:
- Open the Admin menu in the AtoM header bar (the gears icon) and click on "Groups". AtoM will redirect you to the Groups view page.
- Click on the "Add new" button in the button block at the bottom of the page. AtoM will take you to an edit template for a new user group.
- Name the group "Volunteers." You can add a description if you wish, but it's not necessary. Click the "Create" button in the button block when you are done. AtoM will save your new group, and take you to the view page for the Volunteers group.
- There are tabs above the group name and description - click on the "Archival description permissions" tab. AtoM will reload the page and display the default permissions settings for archival descriptions assigned to the new Volunteers group.
- Click on the Edit button in the button block at the bottom of the page. AtoM will reload the page in edit mode. Now we'll edit the permissions settings in the "All archival descriptions" section.
- Mark the following settings to "Deny." Set all others in this section to "Grant":
  - Delete
  - Publish
- Click on the header to open the "Permissions by Archival institution" section, and then click the "Add archival institution" link. AtoM will open a modal with an autocomplete drop-down. Start typing "University of British Columbia," and select the University of
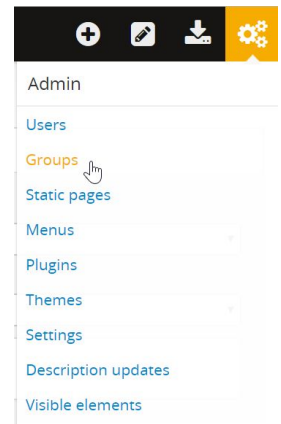
British Columbia Archives when it appears. AtoM will add a new permissions configuration section for the UBC Archives.

- For the UBC Archives, change all permissions to "Deny"
- Click the Save button at the bottom of the page. AtoM will save your changes and reload the page in View mode.
- Now let's customize the taxonomy permissions. We don't want our volunteers to be creating new taxonomy terms (such as Subject, Place, and Genre access points) on the fly - we want them to use the existing controlled values. Click the "Taxonomy permissions" tab at the top of the page. When the page reloads showing the Taxonomy permissions view page, click the Edit button at the bottom of the view page.
- Change all Taxonomy permissions for the Volunteers group to "Deny" and then save your changes
- Now we're ready to add a user to our new group. Open the Admin tab in the AtoM header (the gear icon), and select "Users". AtoM will take you to the Users view page. In the button block at the bottom of the page on the User view page, click the "Add new" button. AtoM will open a new edit page for creating user accounts.
- Let's create a new volunteer, called volunteer1. Enter the following:
    - o Username: Volunteer1
    - o Email: volunteer1@example.com
    - o Pass: volunteer1

Basic info

Username *

| volunteer1 |

Email *

| volunteer1@example.com |

Password *

| •••••••••• | Password strength:

Confirm password *

| •••••••••• |

Passwords match: Yes
☑ Active

- In the Access control area, start typing "volunteer" into the autocomplete drop-down field, and then select the volunteers group when it appears in the drop-down.
- When you're ready, click on the "Create" button at the bottom of the page. AtoM will reload the page in view mode - now we have a new User group called "volunteers," with a new user, "volunteer1," added to this group. Users in this group can create new descriptions, but they can't update them after creation, publish them, or delete them.

When creating descriptions, they can only use existing taxonomy terms, and they shouldn't be able to save new terms created "on the fly" (such as subject or place access points) as we did in Task #2.

Questions:

- Log out, and then log back in as the new volunteer1 user. What's different? Can you delete a description?
- What happens when you try to access a description held by the UBC Archives? (example: "Bitter Paradise: The Sell-out of East Timor" fonds)
- Try logging back in with the demo account, and make some changes to figure out how they affect the volunteer. For example, what happens if you leave the volunteer the ability to update descriptions, but remove the ability to view drafts? Make the changes and then log in as volunteer1 and try.

Conclusion

Thank you for participating in the AtoM 101 training session! There is plenty more to explore in AtoM! Consider exploring the following on your own:

- Setting up a local test instance and mastering the command-line tools in AtoM – we have a [10 video tutorial series](#) on YouTube to get you started!
- Did you know that you can edit the slug/permalink of an archival description? Learn how to try it out [here](#)
- AtoM can act as an OAI repository, exposing DC and EAD XML to harvesters using OAI-PMH. Learn more [here](#)!
- There's plenty more still… keep exploring!

If you have questions, or want to connect with other AtoM users, check out the [AtoM User Forum](#).

To explore some example AtoM sites currently used in production, see our [Users list](#)

Feel free to get in touch with us at Artefactual as well!

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