Running Batch Imports of Collection Content in Archon

When creating a finding aid for a series, there are various means of creating an access point for that finding aid on the Archives website - linking a pdf that is stored on cooper (W:\ drive), inputting the finding aid directly into Archon, or creating a comma separated values (csv) spreadsheet and importing it into Archon. The following guide covers the steps involved in importing csv spreadsheets into Archon using the database management tool. This includes using the correct template, inputting the information, saving the file as a comma separated values spreadsheet, and having a University Archives supervisor import the file.

Note that a finding aid in Archon is referred to as "collection content" and this guide will use both terms interchangeably. To see examples of how these imports come to fruition in a practical sense, consult the entries for record series 35/3/402 through 35/3/415 or 13/6/5 or 8/6/25. These records were all imported using the following steps and each has their own quirks regarding intellectual and physical organization that were remedied using the tools provided by Archon's on-line finding aid architecture. Please use the csv files used to create these imports as templates if you wish.

**Please note, the actual import into Archon detailed in step 4 should be handled by a University Archives supervisor with "database manager" permissions in Archon. Please contact Chris Prom for further information or guidance.

1: Opening the Proper Template

When attempting to import a csv spreadsheet finding aid into Archon it is crucial that the correct template is employed. If the wrong template is employed, the information will not be organized properly and will need to be re-input into the spreadsheet and re-imported.

Find the file titled 'Collection-Content-CSV-Sample' found in W:\archon\incoming. Copy this file and paste it to the selected directory that you wish to work from (most likely G:\Archives\Ahxasst\uasfa but could be H:\ Drive or something else), then name the file according to the standard Archives 7 digit series number - Ask Chris or Bill for guidance if you have questions. DO NOT WORK DIRECTLY WITH THE SAMPLE FILE FOUND IN THE W:\ DRIVE - THIS IS THE TEMPLATE AND SHOULD NOT BE SAVED OVER.

Open this file and note the example template that has already been started. Each column is formatted in a specific order that must be maintained (i.e. Column A must be "collection identifier," Column F "must be "Item #," etc). Each column is titled as to what the cells in that column will contain (folder, title, date, creator, etc.). Before beginning to input data, confirm that this template includes all of the fields necessary to import the information that you will include in the finding aid. If you find that there is a problem, please consult with Chris.

2: Inputting the Information into the Collection Content Template

Begin by deleting all of the example data that you do not wish to use as a resource. If you find that you would like it to be visible for consultation, start entering your data in a row below the example data and you can erase the sample data later. From here you should input the information that you know simply by looking at the folders or by looking at handwritten notes of the arrangement. This means that a column such as "series" or "sub-series" will be left blank and addressed later. When filling out the box, folder, and item information, remember that all items must be associated with a folder, all folders must be associated with a box. This means that anytime you are entering an item, you must also have folder and box data completed for that row as well (and the same when entering a folder, you must have box data). If entering data that should be underlined, bold, or italicized, use BB code (akin to html e.g. [b]...[/b], [u]...[/u], [i]...[/I]) and Archon will format it correctly.

When the data is completed entered into the spreadsheet, discuss with your supervisor the intellectual "series" and "sub-series" that the listing should be divided into. This will allow you to then complete the series column accurately. It may be the case that you do not have any "series" or "sub-series" and that is ok. If associating an intellectual series or subseries remember to follow the rules noted above about each lower level organizational field (box, folder, item) having all higher level organization data entered for that row. See the example template for guidance.

3: Creating a comma separated value spreadsheet (csv) file

After the data in completely input and the organization is satisfactory, save the spreadsheet in the preferred format. Then delete any rows of data that is not directly related to the information to be imported - This includes the column labels at the top of the sheet and all example entries. To delete rows, right-click on the row number and select delete - merely pressing the delete key with all of the cells highlighted will not delete the cell, only the contents.

After this is complete, select "save as" from the "file" dropdown and select format as "csv (comma delimited)." The file should be named the same 7-digit identifier as the spreadsheet, but should also include the suffix csv as well as the extension (e.g. 0101802.xls vs. 0101802csv.csv). The files should be saved to G:\Archives\Ahxasst\uasfa. After reading the prompts and selecting the appropriate responses, you are complete and the file is ready to be imported.

4: Importing CSV Files into Archon

**Please note, this step should be handled by a University Archives supervisor with "database manager" permissions in Archon. Please contact Chris Prom for further information or guidance.

With the csv file saved to the proper directory, it is now time to upload the file into Archon. To do this, enter the Archon Administrative interface and select "database management" from the Archon Administration package. Then select the "collection content csv" import

module and press "launch." You are then prompted to select a file or browse to upload a new file, which is the choice you want. Then find the file with the proper 7digit identifier and the csv suffix and then click on "import." Archon will now import the file, which may take some time depending on the number of cells that Archon is reading through. After it is complete a report will be generated which will note any errors. The most common errors occur because duplicated information is being entered (i.e. you have folder or item numbers that are the same) or because the record series cannot be found (either because the series has yet to be entered with a new series, or it was transcribed incorrectly).

After the import is complete, open the series and check the new box and folder listing to confirm that it is correct. If there are minor errors, those can be fixed in Archon using the edit pencil. If there are substantial errors throughout, it may be necessary to delete the entire entry, edit the original spreadsheet, re-save the csv and then run the import again.

5: Saving Completed CSV Import Files

After completing the upload, the orignal spreadsheet file used to generate the csv file should be saved into the Ahxasst\uasfa folder, and later migrated into the Illiarch\uasfa folder. These spreadsheets are essentially finding aids and if something were to happen with the finding aid in Archon, this file is the only backup that exists.

W:\staff\documents\analog\csv.wpd