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Archival Automation: A Brief Look at Two Systems

Frank T. Wheeler

While computers and automation have seemingly taken over, they have slowly and painfully crept into the archives. Automated on-line catalogs are replacing the manual card catalog and control over numerous collections and record groups has become easier. Some have argued that automation is not a positive step for an archives. These arguments will lessen as archivists begin to integrate automated systems into their daily routines of cataloging and collection maintenance.

There are few automated systems designed especially for archives. The two systems examined here are

MicroMARC:amc and AllMS (Archives Integrated Information Management System). All institutions have different specifications for what they consider to be good "archival software." This evaluation is relevant specifically to the needs of archivists at the Atlanta Historical Society, Inc. In addition, this investigation viewed only the demonstration software and not the full system; opinions of the systems could have been altered after viewing the full packages at work.

MicroMARC:amc, produced by Michigan State University, appeared to be an excellent automation package. The main menu of the package consists of five different choices. These are 1) Edit or Update the Description-Process-Action File; 2) Search Files; 3) Request Reports; 4) Convert Record To/From USMARC AMC Format; and 5) Create Auxiliary Index Files.

The first option, "Edit or Update," is fairly straightforward. A user needs to have a feel for the different fields and tags. This could pose a dilemma for some archivists, who are not as familiar with automated cataloging as are librarians. However, this option does seem easy to follow.

The second option, "Search Files," allows the user to select records from the institution's database. The search can be done by auxiliary index files that can be created in the use of the fifth option from the main menu, "Create Auxiliary Index Files." The Search Files option does not appear, from the demonstration software, to be user-friendly. In addition, it does not break the search down to the folder level. A researcher will have to consult a second source to find an actual folder level inventory. Modification is needed here since there are software packages offering this folder level search ability.

The third option is remarkably helpful in the maintenance and record keeping activities of an institution. The option "Request Reports" has the capability of generating 1) Accession Reports; 2) Processing Status Reports; 3) Future Action Reports; 4) Index Term Reports; 5) Miscellaneous Reports; and 6) Special Reports, which allows the archivist to create and modify his own reports, and provides the archivist, manuscripts curator, or records manager access to every collection and record group at every phase of processing.

Option number four is a nice attribute of the software. The MARCIN and MARCOUT programs allow for the importing and exporting of USMARC formatted files. This is exceptionally helpful to an institution exporting records to OCLC or RLIN. The fourth option seems very easy to use, is menu driven, and requires little input on the user's part. The key to this conversion option is an understanding of the proper use of the USMARC-AMC format before exporting or importing records to and from OCLC or RLIN.

The other software package is AIIIMS (Archival Integrated Information Management System), produced by MIS Software Development, Inc., of Tallahassee, Florida. This system, in place at the Florida State Archives (for whom it was originally designed), is available for purchase as of January 1992. It is important to recognize that the system in use at the Florida archives could be altered to fit an individual institution's needs. This system contains all major features from the MicroMARC:amc package plus additional attractive features deserving of examination.

The first noteworthy advantage of the AIIIMS system is the care that the developers gave to control over patron usage. Upon entry to a repository, a patron's name is entered into the computer, and each is assigned a patron

identification number. The registration process provides all pertinent information about the patron including: address, driver's license/social security number, organization, and interest. All items requested from closed stacks are entered into the computer under the patron's personalized information and number.

The AIIIMS system will take the patron information and convert it into reports that can be used to fulfill a variety of needs. For example, an institution could utilize AIIIMS to compile a report on the number of patron requests for material on topics concerning the Civil War. With today's budget restrictions, this could be very valuable in order to see what areas a repository needs to direct its acquisitions budget toward. This could also assist an institution in compiling user-specific mailing lists for programs and workshops and donor lists for potential future donations.

The detailed user information provided by the AIIIMS system is also an advantage in relation to security. The archivist knows who the last user of a certain item was and can retrieve this information by accessing either the actual folder title or patron use information. Most repositories already have developed reports for research material use information, but these reports commonly are not automated and do not permit a subject specific search.

The most attractive feature of AIIIMS is the ease of cataloging. The staff member entering the information uses a workform adhering to the MARC/AMC format which can later be exported to OCLC or RLIN. Records that are being imported can be edited prior to their addition to the holdings database.

The most important cataloging feature is the length of the record. Unlike other archival software packages, AIIIMS allows the archivist to enter an inventory beyond the

biography/history and scope/content notes. The collection inventory maintains an endless number of cases, bytes, and files crossed. Therefore, the inventory can be entered at folder and, if desired, item level. The item level will be effective when cataloging photographs. However, there is as yet no visual component to AIIMS system which would allow the patron to view the photograph via the computer.

Another cataloging feature is the system's capability to build and maintain authority data files. These will be used as the search terms, and they will be validated against the existing authority files. If the terms do not exist in the files, they can very easily be added.

Action tracking can also be done on any collections or group of records housed in a repository through the AIIMS system. Information on accessions, preservation, arrangement and description, and other tasks which are performed on the collection, record group, or particular item, can be tracked. Included in action tracking, is the capability to provide for security and staff accountability in regards to what has or has not been performed on a particular group or item.

The AIIMS system has no built in restrictions or limits. There is neither a maximum number of users nor a maximum number of records that can be stored on the databases. There is a record limit of two billion per database. According to the demonstration disk and the available literature on this system, the only practical limits are based on the speed and size of the hardware platform on which the system is installed.

In summary, both systems do an outstanding job in meeting their purposes and goals. The AIIMS package contained all of the features of MicroMarc:amc, in addition

to several extremely valuable other features. These additional features of the AIMS system seem to have been made with archivists, manuscript curators, and record managers in mind, but these features do come with a higher price tag.

One must remember that all archives and special collections function on the same basic principles which must be modified to fit their individual needs. Thus, each repository needs to act as an educated consumer, painstakingly examining what they want in an automated system, in order to purchase the system which most closely satisfies their needs and to use it to its fullest potential.

Frank T. Wheeler was manuscripts archivist at the Atlanta Historical Society at the time this article was written. He has since become University Archivist at the University of New Hampshire.