

A Microsoft Alternative to Archivists' Toolkit

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In 2011, the Senator John Heinz History Center embarked on an NHPRC-funded project to minimally process nearly 600 collections from its backlog. For each collection, a finding aid, an EAD file, and a MARC record would be produced. We planned to have Archivists' Toolkit installed by the start of the grant, which would have facilitated the production of the three types of documents from the same data source. However, in the lead up to the project, it was determined that the organization's technical infrastructure could not support the software without an increase in resources.

With just a short period of time before work was to begin, I turned to Microsoft Access as an alternative. Starting off with a blank table, I created fields for all of the descriptive and administrative information we planned to collect, ending up with 55 fields.

Creator Name 1	Creator Name 2	Catalog Prefix	Title Statement	Date 1	Date 2	Extent_boxes	Extent_linear_feet
Richard	Rosenzweig	MSS	Richard Rosenzweig Collection	1993	1999	3	2.5
Dennis	Ross	MSS	Dennis Ross Papers	1948	1959	1	0.5
Richard	Roth	MSS	Roth Carpet and Floors Records	1960s	2000s	4	5.75
Charles	Ruch	PSS	Charles Ruch Photographs	1948	1949	1	.25
Irene Pasinski	Sailer	MSS	Irene Pasinski Sailer Papers	1915	2000	3	3
Noyes	Sandy	PSS	Sandy Noyes Photographs	1993		1	1.5
Vera Peterson Marshall	Schulze	PSS	Vera Peterson Marshall Schulze Photograph Albums	1920	1958	1	0.5
Carolyn	Schumacher	MSS	Carolyn Schumacher Papers	1960s	1990	2.5	2.5

Records: 4 of 3493 of 1526

Figure 1: A view of the database's table

To make data input easier for our processors, I created a form to serve as a front-end to the database, using different tabs to organize the fields. As this was a minimal processing project focusing on collection-level description, no effort was made to accommodate the input of container lists.

NHPRC Collections Database

Title
American Window Glass Records

Processor Alex J. Toner

Start Date: 07/02/2013

Processed Date: 07/16/2013

Completed Date:

Description Administration Tracking

Creator Name 1 American Window Glass Company

Creator Name 2

Date Range 1890s to 1980s

Linear Ft. 63.5

Boxes 39

Language English

Biographical/Historical Note
American Window Glass Company (AWG) began producing glass products in 1889 in Jeanette, Pennsylvania. The City of Jeanette was founded in 1888 when H. Sellers McKee relocated his glass business 25 miles east of Pittsburgh to what was then farmland. With increased space, and access to fuel and natural gas, McKee and his partner, J.A. Chambers, established the Chambers and McKee Glass Works, laying the foundation for the city and glass industry alike.

Figure 2: A form was created to facilitate data entry

The next step involved creating a method for quickly producing the finding aid, EAD, and MARC record worksheet.ⁱ Taking advantage of Microsoft Word's mail merge function, I created templates for each type of document, which contained a mix of static text and variable fields (title, dates, extent, etc.).

```

<archdesc level="collection" type="inventory" relatedencoding="marc21">
<did>
<origination label="creator">«Creator_Name_2», «Creator_Name_1» </origination>
<unittitle encodinganalog="245$a" label="collection">«Title_Statement»<unitdate
encodinganalog="245$f" label="collection" type="inclusive"
normal="«Date_1»/«Date_2»"
>«Date_1»-«Date_2»</unitdate>
</unittitle>
<physdesc label="collection">
<extent unit="linear feet" encodinganalog="300"
>«Extent_linear_feet»
</extent>{«Extent_boxes» boxes} </physdesc>
<abstract encodinganalog="520">
«Abstract»
</abstract>
<repository encodinganalog="852">
<corpname>Senator John Heinz History Center</corpname>
<corpname>Historical Society of Western Pennsylvania</corpname>
<address>
<addressline>1212 Smallman Street</addressline>
<addressline>Pittsburgh, PA 15222</addressline>
<addressline>412-454-6364</addressline>
<addressline>library@heinzhistorycenter.org</addressline>
<addressline>http://www.heinzhistorycenter.org/libraryArchives.aspx</addressline>
</address>
</repository>
<unitid type="collection" countrycode="US" repositorycode="QQS">«Catalog_Prefix»
«Catalog_Number»</unitid>
<langmaterial encodinganalog="546"> The material in this collection is in <language

```

Figure 3: The MS Word EAD template prior to the mail merge. The variable fields are highlighted in yellow.

The variable fields are linked to their corresponding field in the database. Using the mail merge, data can be pulled from Access to populate each document. Following the merge, some cleanup is required: unused fields are deleted, subfield codes have to be added to the subject headings in the MARC worksheet, the EAD code is copied into an XML editor to ensure validation.

```

<archdesc level="collection" type="inventory" relatedencoding="marc21">
<did>
<origination label="creator">McCall, Richard </origination>
<unittitle encodinganalog="245$a" label="collection">Richard McCall Slides and Moving
Images<unitdate
encodinganalog="245$f" label="collection" type="inclusive" normal="1947/1972"
>1947-1972</unitdate>
</unittitle>
<physdesc label="collection">
<extent unit="linear feet" encodinganalog="300"
>1
</extent>(2 boxes) </physdesc>
<abstract encodinganalog="520">
Richard McCall was Captain Adjunct of the Swift Mission Brigade, an author, and an amateur
photographer and filmmaker. The Richard McCall Slides and Moving Images consist of
approximately 35 mm color slides and 16mm films that primarily document the North Side and
Downtown neighborhoods of Pittsburgh. Also included are three reels of footage of the Swift
Mission Brigade that was taken by McCall and Charles Roth.
</abstract>
<repository encodinganalog="852">
<corpname>Senator John Heinz History Center</corpname>
<corpname>Historical Society of Western Pennsylvania</corpname>
<address>
<addressline>1212 Smallman Street</addressline>
<addressline>Pittsburgh, PA 15222</addressline>
<addressline>412-454-6364</addressline>
<addressline>library@heinzhistorycenter.org</addressline>
<addressline>http://www.heinzhistorycenter.org/libraryArchives.aspx</addressline>
</address>
</repository>
<unitid type="collection" countrycode="US" repositorycode="QQS">MSS 0617</unitid>
<langmaterial encodinganalog="546">The material in this collection is in <language
langcode="eng">English</language>. </langmaterial>

```

Figure 4: The MS Word EAD template following the mail merge.

Though it would have been preferable to use Archivists' Toolkit or similar software for this project, there are benefits to using Microsoft applications. For one, the creation of the database didn't require any advanced knowledge or outside resources. With Microsoft software commonplace in homes and offices around the world, there is extensive user-generated support in blogs and message forums. Anytime I hit a stumbling block, a few Internet searches would usually turn up a solution. It was also very easy to modify the database after it was created. During the project, fields were added and rearranged without much effort.

The workflow that existed prior to the grant called for processors to create each of these documents from scratch when processing a collection. By using this mail merge approach, information just has to be entered once, which saves time and reduces the chance of data entry errors. This system helped the History Center meet its ambitious

grant project goals and is currently being used to minimally process incoming collections.

The database and templates can be downloaded from

<http://www.dropbox.com/s/hhr9h1x3xx1wgwp/database.zip>.

About the Author

Matthew Strauss is the Chief Archivist at the Senator John Heinz History Center where he manages all tasks related to acquisition, appraisal, description, cataloging, access, digitization, and preservation of the archival collection. From 2011 until 2013, he directed an NHPRC Basic Processing grant that reduced the History Center's processing backlog by 75%. Matt is a graduate of the University of Pittsburgh's Library and Information Science program, with concentration in Archives and Records Management.

ⁱ MARC worksheets are provided to the History Center's librarian for cataloging the collections in our OPAC.