

## PAWN implementation @ SLAC

-Archivist at SLAC and in terms of PAWN I function in the role of the Records Manager and of Records Liaison.

1. Open PAWN, LOG ON : username = slac: jean ; password=jean
2. Connect
3. Users →slac:jean (**click on Edit to show profile as Records Manager**)
4. Close

-In my Records Manager role, my first step in using PAWN is to make sure that the Records Control Schedules that I need are loaded into the system. If they aren't, I need to load them:

5. Schedules
6. DOE Research and Development Records
7. R&D Project Records
8. R&D Project Case Files
9. Level 1 (click on to show text)
10. Level 2 ( “ “ “ “ “ )

These are the schedule items that I need to schedule the records that are a part of this testbed project. So, I'm set to begin retiring my electronic records.

The next step is for me to create the "Record Sets" that I need.

A "Record Set" is a convention in the PAWN system that allows me, the user, to establish a link or relationship between more than 1 item or group of items that I want to establish and maintain a relationship between BOTH as they are in transit AND after they have been submitted.

11. Record Sets (**button on top toolbar**)
12. SLAC
13. SLD

This screen shows that I have set up a "Record Set" called "SLD Experiment Case File", and that the User Group for this record set is me, a colleague at SLAC, Wilko Kroeger, and the Records Liaison for the SLD group.

After I have established a record set for the records of the SLD experiment, I can **populate that set**, and the way to do that is to add the categories of records that make up the record set. A **“Category”** is the PAWN equivalent of a “Record Series”

14. Edit Set

15. [Shows the already entered categories for SLD]

- a. Experiment Personnel Administration
- b. Communications
- c. Committee Reports
- d. Publications and Notes
- e. Working Group Records
- f. Meeting Papers and Talks
- g. Supporting Technical Information
- h. Data
- i. Computer Code Documentation

**-Now that I, as Records Manager, I have created a records set and populated it with categories, the SLD Records Liaison can begin using this record set and its categories to submit records to the National Archives.**

This is done by **building an electronic “package”** on PAWN. The package includes the records the Records Liaison wants to submit and their related metadata. The package also links to the relevant Records Control Schedule item.

16. Packages

17. Build

18. Record Set (select) “SLD Experiment Case File” select

The RL will eventually have multiple record sets established, and so as **she starts to build a new package, she will have to tell PAWN which record set this particular package she is preparing right now is going to be a part of...**

19. “SLD Experiment Case File” screen

- a. Asks for a description = SLD Committee Reports from SLD Website: Shift Policy

The description that the RL provides here is the local name, or local description: what the records are called by the folks who created them.

The RL then selects the appropriate category for the records that being packaged.

**b. Select**

- c. Shows categories. When you click on a category, it **shows**
  - i. The **relevant authority** and any
  - ii. **Plan Notes** explanation of what is meant by each category, what each category includes

PAWN indicates to the RL that records in the selected category that have been designated as Level 1 Project Records by the Records Manager.

**20. ADD**

Clicking on the “Add” button in the package screen allows the RL to **access locally stored electronic files, and to add them one by one, to the package she is building.**

When an electronic file has been added, the **window on the right-hand side** is activated, allowing the option of uploading and associating a metadata file to an uploaded electronic file or document.

21. Finish
22. Package Status: Received
23. Can “view” and “edit” the submitted package
24. Can also “remove” a submitted package

Using PAWN, as a records officer/ What’s good, what’s not so good / What it means to me:

- The vocabulary has taken a little getting used to
- “Record Sets” concept is new, and has also taken some time to understand and work with comfortably
- The more I use PAWN, the more I want to use, to retire electronic records from other research groups in my organization.
- Nice that it follows conventions established by other desktop programs, easy & somewhat intuitive to learn your way around the PAWN desktop.