

PASCL/CLIR “Hidden Collections” Project

Archivists’ Toolkit Guide

For this project:

1. All collections less than 1 linear foot will receive **ONLY** a collection level record.
2. Collections larger than 1 linear foot will receive arrangement to the series/subseries levels and description to the series/subseries level, and frequently to the folder level.
3. All collection level records must be DACS Single-Level Minimum, but when possible, DACS Single-Level Optimum is desired.
 - a. Due to lack of documentation of actual material, at times, Single-Level Minimum will be all that is reasonable.

Requirements:

DACS Elements	Single Level Minimum	Single Level Optimum
Title [2.3]	X	X
Date [2.4]	X	X
Extent [2.5]	X	X
Name of Creator(s) [2.6]	X	X
Administrative/Biographical History [2.7]		X
Scope and Content Note [3.1]	X (short abstract of scope and content of materials being described)	X (full description of scope and content of materials being described)
Conditions Governing Access [4.1]	X	X
Conditions Governing Use [4.4]	X	X
Language and Scripts of the Material [4.5]	X	X
Access Points		X

In this guide, you will find:

- Step 1: Entering Collection Level Information into the Archivists’ Toolkit
- Step 2: Adding Container Lists to the Archivists’ Toolkit
- Step 3: Proofreading your Work

Step 1. Entering Collection Level Information into the Archivists' Toolkit:

- **BASIC DESCRIPTION INFORMATION:**
 1. Open the Archivists' Toolkit and log in.
 2. Click on Resources on the left navigation bar.
 3. Click on New Record on the top navigation bar which will open a form titled: "Basic Description."
 4. In the form, click on Level and select "Collection."
 5. In the title box, type the DACS compliant title (DACS 2.3).
 6. In the Date Expression box, type the DACS compliant date (DACS 2.4)
 7. Select the appropriate Language (DACS 4.5) from drop-down menu (always the most prevalent language).
 8. Resource Identifier will, in most cases, be the accession number, but the repository will tell you how to enter this information in order to comply with their standards.
 9. Extent (DACS 2.5) should be added in linear feet.
 10. Click Save.
- **ADDING ACCESS POINTS** by clicking on "Names and Subjects" at the top of the form.
 1. **ADDING NAMES** (even collections with the most limited information require a creator):
 - a. Check to see if the name you want to add is already in the list.
 - i. If it is, click on the "Function" drop-down menu and select: creator, source or subject.
 - ii. Two dropdown menus will open, but both can be left blank. If applicable, you can complete role (lists types of creator such as curator, artist, etc) and form subdivision (allows you to link a role to a specific part of the collection and will be largely unused due to minimal processing).
 - iii. Double click on the name to add it.
 - iv. Click Save.
 - b. OR, if your name is not already in the list, you can add a new name by clicking "Create Name."
 - i. You will be prompted to select the type of name you want to create (person, corporate body, or family). Use the drop-down menu to make your selection.
 - ii. Once you make your selection, a new data entry box will pop up with the "Details" tab highlighted.
 - iii. Fill out primary name, rest of name, and dates as well as any other applicable options such as prefix, title, suffix, number, qualifier or fuller form. *Note: Primary name is surname.*
 - iv. Fill out the rules and source boxes: NACO is source; DACS is rules.
 - v. Click OK which should put you into "Name Lookup" box.
 - vi. Click on "Function" drop-down menu and select creator, source or subject. You may add role, if applicable.
 - vii. Click "Link" and the name should be added to your collection.

2. **ADDING SUBJECTS:**
 - a. Click on “Add Subject Link,” which will open a “Subject Term Lookup” box.
 - b. Check to see if the subject you want to add is already in the list.
 - i. If it is, double click on the subject.
 - ii. The subject should be added to your collection.
 - c. OR, if your subject is not already in the list, you can add a new subject.
 - i. Click on “Create Subject.”
 - ii. Copy and paste the subject term from Library of Congress Authorities or the Art and Architecture Thesaurus.
 - iii. Determine the type of subject.
 - iv. The Source is either Library of Congress Authorities (for geographical or topical) and Art and Architecture Thesaurus (for genre/form).
 - v. Click OK
 - vi. Double click on the subject you just created to link it to your collection.
- **ADDING NOTES:**
 1. Click on “Notes Etc. and Deaccessions,” at the top of the form and then on the “Add Note etc.” drop-down menu to select the applicable note.
 2. When you are finished typing the note, click okay.
 3. Click Save.
 - You must write notes for:
 - Conditions Governing Access
 - Conditions Governing Use
 - Preferred Citation
 - Scope and Content note (unless further processing is being performed)
 - Processing (include sponsor note and “Minimally processed to the {collection, series or folder} level)
 - Language of Materials (only if more than one language is in a collection—AT does not allow you to add multiple languages in the “Basic Description form)
 - You may write notes for:
 - Abstract (unless further processing is being performed)
 - Biographical/Historical note (if single level optimum)
 - Custodial History (if the information is available)
 - Related Archival Material (if related material exists)
 - Separated Material (if separated material exists)
- **ADDING FINDING AID INFORMATION.**
 1. Click on “Finding Aid Data,” at the top of the form.
 2. Type in an EAD FA Unique Identifier which will probably be the accession number.
 3. EAD FA Location will be left blank: we and the repository will fill this out WHEN the finding aids are made available on the web (potential for two URLs: repository and PACSCL).

4. Finding Aid Title: Institution Specific in order to provide continuity with their already existing finding aid titles.
5. Finding Aid Subtitle: Probably left blank unless input requested by repository staff.
6. Finding Aid Filing Title: Type the title in a way that it will be sorted logically for researchers, for example: John Smith papers should be input as Smith, John (papers).
7. Finding Aid Date: The date you finished working with the Finding Aid (Year, Month, Day: xxxx.xx.xx) ONLY if you are the last person working with the collection and further processing is not being performed.
8. Author: Your initials ONLY if you are the last person working with the collection and further processing is not being performed.
9. Description Rules: DACS.
10. Language of the Finding Aid: English.
11. Sponsor Note: Leave blank as it is in the processing information note.
12. Edition Statement: Leave blank.
13. Series: Leave blank. At this point you are creating only a collection-level record. Processors will add series/subseries titles if they exist.
14. Revision Date: Leave blank as we are working with unprocessed collections.
15. Revision Description: Leave blank as we are working with unprocessed collections.
16. Finding Aid Status: Click on drop-down menu and select “In Process.” Holly/Courtney will change to “Completed” once reviewed.
17. Finding Aid Note: Leave blank, generally speaking, unless there is something critical that needs to be addressed.
18. Click Save.

Step 2: Adding Container Lists in the Archivists’ Toolkit:

- Click on the Basic Description Tab:
- To **ADD SERIES**, follow these steps:
 1. Click “Add Child” button and a new “Basic Description” data entry screen will pop up.
 2. Click on the “Level” drop-down menu and select “Series.”
 3. In the “Title” field, type in the title of your series.
 4. In the “Date” field, type your date in the most appropriate of the following:
 - a. “Date Expression” is for a phrase, such as circa, 2005 June 4 or 2003 March.
 - b. “Date_Date Begin__Date End__” is for inclusive dates: This is probably the most common format for series dates.
 - c. Bulk dates may be used, if relevant.
 5. In the “Language Code,” drop down menu, select the language that is most prevalent within the series. If the entire collection is in English, you do not need to repeat English at every series level.
 - a. Usually, the language will be English.
 - b. In order to avoid scrolling down through the list of languages, you can type “eng” and English should pop up.
 6. In the “Extent” field, add the linear feet of the specific series.

- a. Check with the repository staff to see if this is something that they want done.
7. “Instances”: Leave blank—this function will be used later.
8. Click Save!
- To **ADD ANOTHER SERIES**, click “Add Sibling” and follow steps 2-8. Continue this process until all your series are added.
- To **ADD SUBSERIES**, you will be following the same steps as above, simply applying them to the series level rather than the collection level:
 1. Click on the series to which you want to add a subseries.
 2. Click on “Add Child” button and a new “Basic Information” screen will pop up.
 3. Follow the “Adding Series” instructions 2-8 and substitute “Subseries” for “Series.”
- To **ADD FILES**, you will adding them within the series or subseries, or possibly directly from the collection level.
 - If you add files to the collection level, follow instruction for “Adding Series,” but substitute “File” for “Series.”
 - If you add files to the series level, follow instructions for “Adding Subseries,” but substitute “File” for “Subseries.”
- **ADDING INSTANCES** is where you can add the physical location of the material within the collection and it can be done at any level of the collection.
- You will usually be adding instances at the series, subseries or file levels.
- The following instructions can be applied to series, subseries or files. If you wish to add instances to subseries or files, simply substitute “subseries” or “files” for “series.”
 1. Click on the series to which you want to add an instance. On the right side of the “Basic Description” form, you will see a box titled “Instances.”
 2. Click on “Add Instance.”
 3. A box will pop up that asks, “What type of Instance would you like to create?”
 - a. Click on the drop-down menu and select the type of material contained within your series (typically text).
 - b. Click OK.
 4. A new data entry box will automatically pop up called “Analog Instance.”
 - a. Container 1 Type: Select how the material is housed (In boxes, drawers, map cases, etc.)
 - b. Container 1 Indicator: This will be a number OR numbers, identifying the box, drawer or map case).
 - c. Container 2 Type: Select how the material is housed WITHIN Container 1 Type (most commonly, in folders).
 - d. Container 2 Indicator: This is a number OR numbers, identifying the folder, etc.)
 - e. Click OK
 - f. Continue until all of your intellectual material is connected to a physical location.
 - g. Click Save.

- Remember, this is minimal processing. Not every folder has to be listed in the finding aid. Sometimes the location of the material may be described more broadly:
 - Series 1. Correspondence, 1991; Boxes 1-2
 - Series 2. Correspondence, 1992; Boxes 3-4
 - Series 1. Correspondence, 1991; Box 1, Folders 1-10
 - Series 2. Correspondence, 1992, Box 1, Folders 11-25
- If you are describing at the folder level, your finding aid might include this information:
 - Series 1. Correspondence, 1991
 - Box 1, Folder 1: January 1991
 - Box 1, Folder 2: February 1991, etc.
- You can add multiple instances to one intellectual level:
 - Series 1. Correspondence, 1991
 - Boxes 1-2; Box 3, Folders 1-10
- **USING RAPID DATA ENTRY (RDE):** This is an extremely handy and efficient way to add bulk amounts of information: especially if you are adding folder lists.
- This is also an opportunity to add the intellectual and physical arrangement into the Archivists' Toolkit at the same time.
- Follow these steps:
 1. On the left navigation bar, decide where you want to add information (collection, series, or subseries).
 2. Click on the drop down menu entitled "Select an RDE" located next to the "Add Sibling" button.
 - a. The project team has created an RDE for you at each repository: "PACSCL." You can select series, subseries or file in the "level" drop down.
 3. Select the PACSCL and determine the level applicable to your data entry.
 4. Decide what information is a constant and then make that/or those field(s) "sticky" (the information you type in "sticky" fields will remain when you move to the next item) by pressing control and clicking on the title of the field you want to remain constant.
 5. Type your descriptive information into the text boxes.
 6. Click +1.
 7. You will be able to add the next series, subseries or file with your constant material remaining in the fields.
 8. Click OK when you are finished adding all of the series, subseries or files.
- As you are adding the series, subseries, or files, you will be able to see the hierarchy building on the left navigation bar and you can determine if the items are appearing in the correct place.
- **ADD ADDITIONAL NOTES:** You can add notes at any point and to any intellectual level (series, subseries/file) level you create.
- Generally speaking, you will only add "scope and content" or "related material" notes to the series, subseries or file level. Most other notes are more appropriate at the collection level.

- Complete the **FINDING AID INFORMATION**: At this point, all of your series, subseries and files (the intellectual arrangement) should be entered into the Archivists' Toolkit and that information should be connected to a physical location (the instances).
- Fill in the following data:
 1. Finding Aid Date: The date you completed the finding aid.
 2. Author: Your initials.
 3. Series: List all series names and dates, if applicable.
 4. Finding Aid Status: Click on drop-down menu and select "In Process."
 - a. Holly and/or Courtney will change this to "Completed" once it has been reviewed.
 5. Finding Aid Note will be left blank, unless you think there is a need to describe/explain a portion of the finding aid. If you do, discuss with repository staff and/or Holly and Courtney.

Step 3: Proofreading Your Work:

- We are working at an extremely rapid rate and we are all bound to make mistakes. Please take the time to proof your finding aid and look at the Processing Manual for tips on what to look for when reviewing.
 1. Click on "Reports," located at the bottom of the "Basic Description" form at the collection level.
 2. Select Report: Finding Aid.
 3. Select Output: HTML file.
 4. Click Save.
 - a. In SAVE AS, type the document name and save to the desktop (this is not a permanent document and it will be deleted after you are finished working with the collection).
 5. Open the HTML file, select all (the entire finding aid), and copy and paste into a Word Document.
 6. Run Spell Check.
 7. Make all your corrections in the Archivists' Toolkit: DO NOT make corrections in the Word Document.
 8. Look at the Processing Manual for what to look for when proofing your work.