Guide to the Archivists’ Toolkit
Hidden Collections Processing Project

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2013-2014
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INTRODUCTION

“The Archivists’ Toolkit™ (AT) is the first open source archival data management system to provide broad, integrated support for the management of archives. It is intended for a wide range of archival repositories. The main goals of the AT are to support archival processing and production of access instruments, promote data standardization, promote efficiency, and lower training costs. Currently, the application supports accessioning and describing archival materials; establishing names and subjects associated with archival materials, including the names of donors; managing locations for the materials; and exporting EAD finding aids, MARCXML records, and METS, MODS and Dublin Core records. Future functionality will be built to support repository user/resource use information, appraisal for archival materials, expressing and managing rights information, and interoperability with user authentication systems. The AT project is a collaboration of the University of California San Diego Libraries, the New York University Libraries and the Five Colleges, Inc. Libraries, and is generously funded by The Andrew W. Mellon Foundation.”

–Archivists’ Toolkit website, http://archiviststoolkit.org

It is important to note that AT is a work in progress, and it is not an especially intuitive database for the newcomer. It is, however, a powerful archival collections management tool that is designed to be flexible in order to accommodate many collection and repository needs. While the program may seem daunting at first, keep in mind that there are only a few basic actions to learn. Those same actions will be applied in various ways to accomplish different levels of data entry.

A big part of what makes AT such a great tool is that it manages collection data hierarchically, mimicking the way in which archivists’ manage collections intellectually. In fact, only when you link records to “instances,” or physical locations, do you connect the intellectual arrangement (or collection hierarchy) with the physical arrangement. As you enter data, monitor the left hand navigation bar in AT, and you will see the hierarchy build.

The data you enter will ultimately be used to create your “finding aid.” A finding aid is a tool archivists use to provide access to collections. It should contain contact information for the repository and credit the donor of the collection; as well as provide basic information about the collection, including the creator, types of material found within the collection, and depending upon the level of processing, a detailed box and folder list.

The first iteration of this manual was written for the PACSCL/CLIR Hidden Collections Processing Project in 2009-2012. The current edition has been updated by Christiana Dobrzynski Grippe under the auspices of the PACSCL/CLIR Hidden Collections Processing Project to be completed in 2013-2014. It provides instructions for entering basic collection, series, subseries and folder level data. It is not a complete instruction manual for using the Archivists’ Toolkit. Additionally, the manual does not address the increasingly necessary concerns about migrating to ArchivesSpace 1.0, released in October 2013. For the duration of the 2013-2014 project, the project team will continue to generate all of its finding aids using the Archivists’ Toolkit.
GETTING STARTED

1. Open the Archivists’ Toolkit.

   Basic instructions for installing AT are available on the PACSCL Project website: clir.pacscl.org.

2. Log in using username and password. The database will open to this screen:

3. Double click on “Resources,” which you should see on the left navigation bar.

   All existing collection records will populate the large gray area seen in the image above.

4. Select the collection (or resource) you would like to work on, by double clicking on the collection title from the existing list -- OR -- add a new collection record.
   
   a. To add a new collection record, click “New Record” from the menu along the top of the screen.

   In either case, a data entry screen called Basic Description will pop up:
For existing records, the *Basic Description* screen will already contain at least the following collection level information: level, resource identifier, collection title, date, language code and extent.

For new records, you must enter collection level data into the blank *Basic Description* screen. The following fields are **required** to create a new collection level record: level, resource identifier, collection title, date, language code, and extent.

From here, you will be able to add series, subseries and folder level data to the collection level record, thereby providing increasingly detailed information about the contents of the collection and establishing its hierarchical arrangement. The collection’s hierarchy will become more apparent as you add information to the database, and actually see the hierarchy develop in the large, white navigation field to the left of the *Basic Description* screen.
IMPORTANT TO KNOW: ADD CHILD, ADD SIBLING, ADD INSTANCE

Now that you have your collection level record entered (or selected), you are ready to begin adding series, subseries and folder level data to the database. However, before you get started, there are some things you need to know about AT that will help you understand the database and make data entry much easier. The first are the “Add Child,” “Add Sibling” and “Add Instance” buttons.

Add Child
This button is used to add a new component to the collection record that is one level below the current level in the collection’s hierarchy. For example, a “series” is the child of a collection; a “subseries” is the child of a series; and a “file” or “folder” is the child of a subseries. Each collection is unique, however. For example, sometimes a “file” is a child of a collection or a series. Depending on what level of the collection you are working on, “Add Child” can be used to add a “series,” “subseries” or “folder” level record.

Add Sibling
This button is used to add a new component to the collection record that is the same level as the current level in the collection’s hierarchy. For example, a “series” is sibling to all other “series;” a “subseries” is sibling to all other subseries within a particular series; and “file” or “folder” is sibling to all other files within a particular series or subseries. If you are entering folder level data within series one, you can use the “Add
Add Instance
This button allows you to link your record with a physical location within the collection. Basically, it’s how you assign box and folder numbers, which help reference archivists and researchers locate specific folders within a collection quickly. It can be done at any level of the collection.

ADDING SERIES

_Hint: Once you know how to add series, you will also know how to add subseries and files._

To add a series to the collection level record in AT, follow these steps:

1. Click once on the collection name in the large navigation field on the left. It will become highlighted in dark blue.
2. Click the “Add Child” button, a new Basic Description data entry screen will open.
3. Click on the “Level” drop-down menu and select “Series.”
4. In the “Title” field, type in the title of your series. For example, Business records, Correspondence or Financial records.
5. In the “Date” field, type the series date in the most appropriate of the following choices:
   - “Date Expression:” This field is used for a single year, date or phrase. For example, 1900, circa 1990, 2005 January 4, or 2003 March.
   - “Inclusive Dates:” Type the very earliest year represented in the series in the “Begin” field and the very latest year in the “End” field. _Hint: These fields only support a four digit year._
   - “Bulk Dates:” This is used, when necessary, in addition to “Inclusive Dates.” For example, let’s say your series’ begin date is 1500 and its end date is 1900, but most of the papers in the series dates from 1700 to 1800. In the “Inclusive Dates” fields you will type: 1500, 1900; and in the “Bulk Dates” fields you will type: 1700, 1800.
6. From the “Language Code” drop down menu, select the language that is most prevalent within the series.
   - This is not required information. If the entire collection is in English, since the primary language of the materials is ALWAYS noted at the collection level, you DO NOT need to repeat English at every series level.
   _Hint: In order to avoid scrolling down through the list of languages, you can type “eng” in the text field and English should populate the box._
7. In the “Extent” field, add the linear feet of the specific series.
   - This is not required information.
8. “Instances:” Leave blank for now, this function will be used later.
9. Click SAVE!

To add another series, you can either click “Add Sibling” from the current series record – OR – you can return to the collection level record by clicking once on the collection name in the left navigation bar and click “Add Child.” Repeat steps 2 to 8. Continue this process until all of your series are added. As you add
series to the collection, you will see the series list grow in the large navigation field on the left side of the data entry screen as illustrated below:
ADDING SUBSERIES

Subseries are not always necessary. However, if you have subseries, to enter them into AT you will follow the same steps as you did to enter series. Simply apply those steps to the series level rather than the collection level, and replace subseries for series:

1. Click once on the series to which you want to add a subseries, it will become highlighted in dark blue.
2. Click on the “Add Child” button and a new Basic Description screen will pop up.
3. Follow ADDING SERIES instructions 2 to 8, substituting “Subseries” for “Series.”

ADDING FILES

To add files, you will follow the same basic steps as you did to add series and subseries. Usually, you will add files to series or subseries; however, if the collection does not warrant series or subseries, you can add files directly to the collection level record as well.

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 or subseries level, follow instructions for “Adding Series” or “Adding Subseries,” but substitute “File” for “Series” or “Subseries.”

1. Click once on the series or subseries to which you want to add a file, it will become highlighted in dark blue.
2. Click on the “Add Child” button and a new Basic Description screen will pop up.
3. Follow ADDING SERIES instructions 2 to 8, substituting “File” for “Series.”

If you look at the example below, which depicts file level records added to Series One, Subseries A, you can see the collection’s hierarchy taking shape.

NOTES, etc.
Most notes (abstract, historical note, scope and content note, conditions governing use, etc.) are added to the collection level record; however, AT makes it easy to add notes to any intellectual level you create (series, subseries or file, for example).

Most collections require the following types of notes: abstract, biographical/historical note and scope and content note; language of the materials note, if there is more than one language represented in the
collection; notes for conditions governing access and conditions governing use; immediate source of acquisition note, if known; separated materials note, if applicable; and a related archival materials note, if known.

Often, scope and content notes or related materials notes are also added to the series or subseries level to provide additional details about the contents of specific sections of the collection.

**Adding notes**

The same steps are used to add any type of note to any level of the collection.

1. On the left navigation field, click once on the collection title, series, subseries or file name to which you want to add a note. It will become highlighted in blue.

   *Hint: it is very important that you have selected the correct record to which you want to add a note.*

2. Click on the **Notes, Etc. & Deaccessions** tab (located at the top of the *Basic Description* screen), and a new data entry screen will open:

3. Click on the drop-down menu titled “Add note, etc.”
4. From the drop-down menu, select the type of note you wish to add.
5. A new data entry screen will pop up, with the title of your note. For example, if you decided to add an abstract, the screen will look like the screen pictured below. Notice on the left navigation bar, the collection name is highlighted in blue, indicating that the abstract will be associated with the collection level record.

6. Write your note in the large text box and when you are finished,
7. Click OK. The Notes screen will automatically close. You will then see your note listed in the gray box, as illustrated on the following page:
8. Repeat steps 3 to 7, until all of your notes are added.
9. To exit the Notes, etc. & Deaccessions screen, click once on the Basic Description tab.
10. Click Save!

To add notes to other intellectual levels of the collection, click once on the name of any series, subseries or file on the left navigation bar and the notes field will remain open. Simply follow steps 3 to 7 to add notes to those records.

**Editing notes**

Notes can be edited anytime. To reopen existing notes, click once on the level to which the notes were added. It will be highlighted in dark blue. Return to the Notes, etc. & Deaccessions tab and simply double click on the name of the note you wish to edit. The data entry screen will pop up and you may edit the notes.

**To remove a note**

1. *From the Notes, etc. & Deaccessions screen, click once on the name of the note you would like to delete*
2. *Click the “Remove note, etc.” button, which is located to the right of the drop down menu*
3. *Your note should be deleted*
ADDING INSTANCES

In AT, “Instance” refers to the physical location of the materials within the COLLECTION. Basically, it’s how you assign box and/or folder numbers, enabling materials to be found quickly and easily. Instances can be assigned to any level of the collection.

You will usually add instances at the series, subseries or file levels. It is recommended to wait to add instances until the very end of processing and/or data entry, when you are sure that the collection order will not be changed.

The following instructions can be applied to series, subseries or files.

1. Make sure you are on the Basic Description screen.
2. Click once on the series, subseries or file to which you want to add an instance. It will become highlighted in blue.
3. On the right side of the Basic Description screen, you will see a box titled Instances. (see page 5, for illustration)
4. Click the button “Add Instance.” A box will pop up that asks, “What type of Instance would you like to create?”
   • Click on the drop-down menu and select the type of material contained within your series, subseries or file (this will usually be text).
   • Click OK.
5. A new data entry box will automatically pop up called Analog Instance, which is pictured below. Fill in at least the following fields:
   • Container 1 Type: From the drop down menu, select how the material is housed (in boxes, drawers, map cases, etc.).
   • Container 1 Indicator: This will be a number OR numbers, identifying the box, drawer or map case. If it the first box in a particular collection, this number will be 1.
   • Container 2 Type: From the drop down menu, select how the material is housed WITHIN Container 1 Type (most commonly, this will be folders).
   • Container 2 Indicator: This is a number OR numbers, identifying the folder, etc. If the materials are housed in the fifth folder within box 1, this number will be 5.
   • Click OK. You will see the instance listed in the gray box just above the “Add Instance” button.
6. Follow steps 1 to 5 until all of your intellectual information (series, subseries and/or files) is connected to a physical location.

Hint: Collection containers should be numbered in one consecutive numeric scheme. There should only be ONE “Box 1” in a collection. You should NOT start each series with a new “Box 1.”

Hint: Each box SHOULD start with a new Folder # 1. This will make editing box and folder numbers much easier if (when) you make a mistake in numbering or need to add a last minute file to a box. You will only have to fix the folder numbers for one box, rather than the entire collection!

7. If you make a mistake, double click on the instance listed in the gray box.
- The Analog Instance screen will reopen and you can simply delete the incorrect data and type in the correct data.

8. Click “Save”!

![Image of the Analog Instance screen]

*Hint: This is minimal processing! Not every folder needs to be listed individually in the finding aid. For example, if there are 12 files containing meeting meetings from 1950, you may choose to enter the information one time. The instance may look something like this: Box 1, Folders 1-12.*

*Sometimes, in minimal processing, the location assigned is much broader. For example, if there are dozens of files containing meeting minutes for numerous consecutive years, say 1950 to 1960, your instance may just note the box numbers in which the minutes are contained: Boxes 1-3. In this case, you do not need to fill out the Container 2 Type or Container 2 Type Indicator fields.*

**RAPID DATA ENTRY (RDE)**

You can use Rapid Data Entry (RDE) to add series, subseries or folder level records. RDE is a great time saver that allows you to add records and instances in one step. It is especially useful when entering long lists of folder titles in a particular collection, series or subseries. If you plan to use RDE to complete your data entry,
it is best to wait until the collection is fully and completely arranged, with no chance of the order of the series, subseries or files being changed. To start RDE:

1. Click the collection, series or subseries to which you will add the new group of records. It will become highlighted in blue.

   *Hint: RDE automatically enters records at a level below what you select. For example, if you selected “Series Two,” as in the example below, RDE assumes that the information you are about to enter are the children of “Series Two.”*

2. Next to the “Add Sibling” button, select “PACSCL” from the RDE drop down menu.

   *Please note: The “PACSCL” RDE data entry screen was created for the purposes of this training only. It is saved in the AT sandbox, but it WILL NOT be an option in your institution’s instance of AT. The RDE default screen can be customized to suit your institution’s needs. Instructions on how to do this are included at the end of this manual.*

3. This Rapid Data Entry screen will pop up:

4. Fill in level, title, date and instance (container or box and folder number) information

5. Click “+1” to add the next record
6. Click OK, when you are finished adding all of the series, subseries or files.
7. Click Save!

As you add the series, subseries or files using RDE, even though the RDE screen is in front of the Basic Description screen, you will be able to see the hierarchy building on the left navigation bar, enabling you to determine if records are appearing in the correct place. On the illustration on the following page, note that “Series Two” is highlighted in blue, and that the new records entered using RDE are the children of “Series Two.”

Making fields “sticky”

What makes RDE so efficient is the ability to make fields sticky, or automatically populate from one record to the next. This means fewer steps and less clicking! This is especially useful with the fields “Level” and “Container Type,” but depending on the collection, this timesaver can be applied to any field in RDE.

To make fields “sticky”

1. Put your mouse curser over the word (for example: “level”)
2. Press and hold “control” on your keyboard
3. Click once. The word will turn red. See example pictured above
4. Fill in the text box with the desired information
For example, if you are entering files, after you make the “level” field “sticky,” you will select “file” from the drop down menu. This will automatically populate every time you hit “+1,” until you change the level or make it “un-sticky.”

To make the field “un-sticky”
1. Place your mouse cursor over the red word,
2. Press and hold “control” on your keyboard
3. Click once. The typeface should turn black again.

**LINKING NAME AND SUBJECT AUTHORITIES**

Like librarians, archivists use authorized terms in order to provide standardized access points to collections. We recommend using Library of Congress authorities and the Art and Architecture Thesaurus as your primary banks for obtaining authorized terms; however, you are not required to do so.

AT enables you to maintain a name and subject bank, which will assist you in using standardized access terms across all of your collections. When you first set up AT, both the name and subject banks will be empty. You have the capacity to import an existing bank (if you have one) or you can create one as you go. You can link names and subjects to any intellectual level in the collection; though it is most common to do so at the collection level.

Provided below are instructions for adding names and subjects to the database bank as needed, and linking those names and subjects to a specific collection level record.

**Linking/Adding Name Authorities**

1. Select the collection you wish to link names and subjects to from the Resources list.
2. Click once on the collection title in the left navigation field. The collection name will become highlighted in blue.
3. Click on the Names & Subjects tab, which is located to the right of the Basic Description tab, a new screen will open. (see image on page 20)
4. To link a name click “Add Name Link.” A new window called Name Lookup will pop up. (see image on page 20)
5. Select the name you wish to link to the record from the bank of names provided.
   - You can look for a name in two ways
     - Scroll down the list, and select the name you wish to link to the record
     - Or, type the name in the text box called “filter” and it will find the name in the list for you
6. You are required to select a “Function.” From the drop down menu, located at the bottom left of the window, select whether the name is a Creator, Source or Subject in relationship to the collection.
7. Click the “Link” button, which is at the bottom of the window. (You can also simply double click the selected name and it will automatically link to the record)
8. If you do not find the name in the bank that you wish to link to the record, you will have to create a new name authority.

- Staying in the Name Lookup window (see bottom image on page 20), click the “Create Name” button, which is at the bottom of the window to the right of the “Link” button. A box will pop up asking “What type of name would you like to create?”
  
  i. From the drop down menu, select Person, Corporate Body or Family
  
  ii. Click “OK”
  
  iii. If you select “Person,” the screen pictured below will pop up:

  
  
  iv. We recommend filling in at least the following fields: Primary name (in the case of a person, this would be the person’s surname), Rest of the Name (first name); Suffix, if applicable; Dates (birth and/or death dates), if known.
  
  v. Providing a source is required. Select from the drop down menu where the authority originated.
  
  vi. Click “OK.” The Names screen will close.
  
  vii. You will be brought back to the Name Lookup screen; your newly added authority will be highlighted.
  
  viii. Select the function
  
  ix. Click “Link” OR double click the highlighted name
  
9. Repeat steps 5, 6 and/or 7, until all of your name authorities are linked to the collection record.

10. Click “Close Window” on the “Name Lookup” window
In either case, whether you selected an authority from the existing bank or created a new name authority, you will see the name(s) listed in the general *Names & Subjects* screen, as illustrated below:

### Linking/Adding Subject Authorities

Directly below the “Names” field, in the *Name & Subjects* tab, you will see “Subjects.” Subjects are linked to collections in much the same way as names are. To link a subject to the collection:

1. Click the button “Add Subject.” The screen, *Subject Term Lookup*, which is similar to the *Name Lookup* screen, will pop up.
2. You can look for a subject term in two ways
   - Scroll down the list, and select the subject term you wish to link to the record.
     - Click the “Link” button, which is at the bottom of the window. (You can also simply double click the selected subject term and it will automatically link to the record).
   - Type the subject term you are looking for into the text box called “filter” and it will find the subject term in the list for you.
     - Click “Link,” or double click on the subject term and it will automatically link to the record.
3. If you do not find the subject term in the bank that you wish to link to the record, you will have to create a new subject term authority.
   - Staying in the *Subject Term Lookup* window, click the “Create Subject” button, which is at the bottom of the window to the right of the “Link” button.
   - A data entry form called *Subjects* will pop up.
   - Type in the subject term
   - Select the Type from the drop down menu (these are derived from MARC cataloging).
   - Select a source from the drop down menu where the authority originated.
   - Click “OK.” The *Subjects* screen will automatically close.
   - You will be brought back to the *Subject Term Lookup* screen; your newly added subject term will already be linked to the collection record, so you do not need to take any more action.
4. Repeat steps 1, 2 and/or 3 until all of your subject terms are linked to the collection record.
5. Click “Close Window” on the *Subject Term Lookup* window
6. You will now be back to the *Names & Subjects* tab, and will see all of the subjects you just linked to the collection record listed.

**ADDNG FINDING AID INFORMATION**

At this point, all of your data entry should be complete. You are almost ready export your data and create the collection’s finding aid. Before you do that, however, you must fill out the *Finding Aid Data* tab.

1. Click once on the collection title on the left navigation bar. It will become highlighted in blue.
2. Click on the *Finding Aid Data* tab, located on the top navigation bar to the right of *Notes, etc. & Deaccessions* and a new data entry screen will open (see image on page 22).
3. We recommend filling out at least the following fields:
   - Finding aid title, for example: John Smith papers, 1910-1950
   - Finding aid filing title, if different from title, for example: Smith, John (papers), 1910-1950
   - Finding Aid Date: The date you completed the finding aid.
   - Author (the person(s) who wrote the finding aid)
   - Description Rules: We use *Describing Archives: A Content Standard* (DACS)
   - Language of the Finding Aid: English.
   - Sponsor Note: You should give credit to special funders here
   - Series: List all series names and dates, if applicable. This is only necessary if you plan to create a MARC record for the collection, as this information will be exported in a MARC record only.
   - Click “Save”!
PROOFREADING YOUR WORK

Clean and consistent data is important. Although the current version of AT does have spell check, the PACSCL Project proofreads and edits work in two ways:

1. To check the data for spelling and grammar errors, export the data as a PDF or HTML file, and then copy and paste the data into Microsoft Word. In order to do so:
   • Click on “Reports,” located at the bottom of the Basic Description screen at the collection level. A new screen Reports, will pop up.
   • Select Report type: Finding Aid.
   • Select Output: HTML file.
   • Click Save. A new window, Save, will pop up.
     ii. In SAVE, select where you would like to save the document. As this is a temporary document, we recommend saving to your desktop.
     iii. Title the document and click “Save.”
2. Open the new HTML file on your desktop. Select all, and copy and paste into a Microsoft Word Document (MS 2003 works best)
   • Run Spell Check.
   • Make corrections in AT. **DO NOT** make corrections in the Word Document!
3. After you make spelling and grammar corrections in AT, re-run the report and review the entire collection for readability and accurate data entry. Refer to the Processing Manual for what to look for when proofing your work.

4. Then return to AT and make sure that:
   - Data is entered correctly and consistently.
   - That the appropriate level is selected for every single series, subseries and file in the collection. This is very important, as it will affect the finding aid display if it is entered incorrectly.

OTHER HELPFUL HINTS: **ITALICIZING, BOLDING and UNDERLINING TEXT IN AT**

In AT, text can be bolded, italicized, or underlined text within notes, series titles or folder titles. In order to do so:

1. Highlight the word(s) that you wish to format.
2. Look below the text box in which your word(s) is highlighted. There will be a drop down menu titled “Wrap in tags.”
3. In the drop down menu, select “emph.” A new box with a different drop down menu will appear.
4. Select the way that you want your text to “render.” Typical selections are: bold, italic and underline. Once you have made your selection, the box will automatically close and the highlighted text will have tags on either side. The text will NOT be bolded, italicized or underlined in the data entry field or the left hand navigation bar. When the data is exported into the finding aid, the text will display with the proper formatting.

**Good Data Entry Habits**

Consistent and good quality data entry is important!

- Punctuation: You should establish how you would like to use punctuation at the beginning of data entry, and be sure to do so consistently throughout.

For example, do you want a period or comma at the end of your titles? If you use one of AT’s canned style sheets (for example, the HTML or PDF finding aids), you will have to add punctuation.

Our project’s style sheet automatically inserts a comma in between the collection/series/subseries/folder title and the date, which means our project workers do not have to type punctuation at the end of any title field.

- Unnecessary Spacing: Be sure you do not add extra spaces after titles or dates as you enter data. This can affect the display of your data when you export it.

**CONFIGURING A RAPID DATA ENTRY FORM**

1. Make sure that you are closed out of the collection record
2. Along the top of the main database screen, you will see the word “setup”
3. Click “Setup,” and there will be a drop down menu
4. Select “Configure Rapid Data Entry Screens,” a screen entitled “Edit Rapid Data Entry Screens” will automatically open.
5. Click the “Add Record” button, a new screen titled “Rapid Data Entry Screen” will open

6. Choose from the list on the left which fields you would like to include in your RDE screen. We recommend including at least: Title, Date Expression, Inclusive Dates, Bulk Dates and Analog Instance.
7. Click once on the first field that you would like to add. It will become highlighted in blue.
8. Click the “Add” button. You will see your selection added to the list on the right.
9. Follow steps 7 and 8 until all of your selections have been added to the right.
10. Review the order in which the fields are listed on the right. This is the order they will be presented on the RDE screen.
   • To change the order of the fields, you will have to highlight the field you want to move and use the “Move Up” and “Move Down” buttons to rearrange the order.
11. To remove a field, if you change your mind, simply highlight the field that you would like to remove and click “Remove.”
12. Lastly, you are required to name your RDE screen, which you can do along the top of the screen.