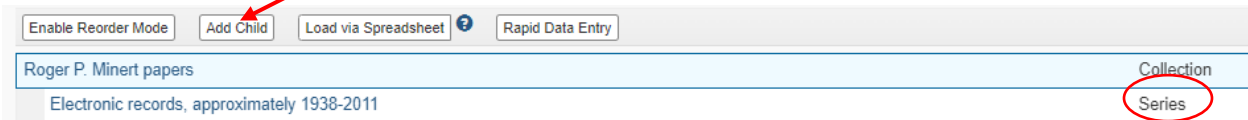


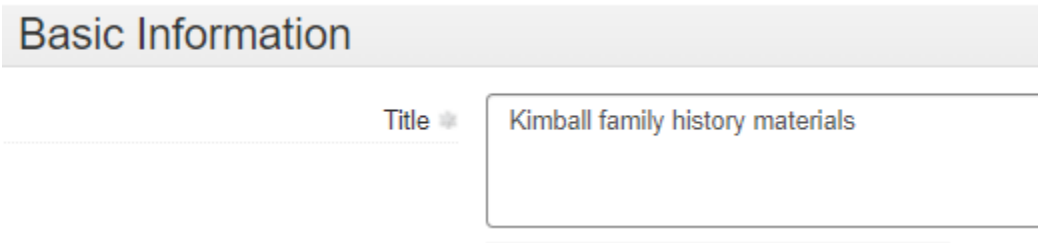
Finding aids can sort materials into broader categories called series. Once your collection level data is in, click on “add child in ArchivesSpace to start adding these series.



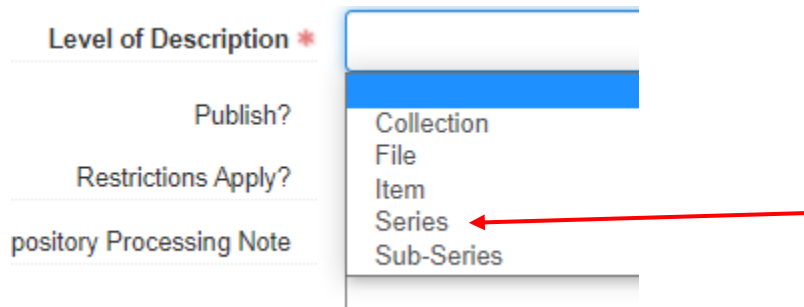
ArchivesSpace will display a new record placed beneath the collection level.

Titles:

The curator will outline on the processing plan what the name of each series should be, so simply type in the title of the series that is given to you. Or, if you working with a legacy finding aid, copy and paste the series title from the old finding iad into ArchivesSpace.



Level of description: ArchivesSpace will then ask you for the level of description. Select “Series.”



Component unique identifier: Series and subseries are simply numbered in numerical order using this field (i.e. 1, 2, 3 etc.) Make sure to click the publish box as well under the ID and level of description.

Basic Information

Title	Kimball family history materials
Ref ID	ac19b133cab593076674a2e58429b580
Public URL	https://archives.lib.byu.edu/repositories/tpsc/archival_objects/ac19b133cab593076674a2e58429b580
Slug	ac19b133cab593076674a2e58429b580
Automatically Generate Slug?	<input checked="" type="checkbox"/>
Component Unique Identifier	1
Level of Description	Series
Publish?	<input checked="" type="checkbox"/> Please be aware this record has an ancestor that is unpublished.

Language:

If a series contains materials in a language other than the language that was selected at the collection level, it will need to be pointed out at series. Use the drop-down menu to select the appropriate language. If you're editing this drop-down to say "Multiple languages," a **Language of Materials note** will also need to be added. Sadly, if a Language of Materials note and Language drop-down selection at the level indicate multiple languages are in that series, *every single* item and file below will need a drop-down selection to specify which language they are.

Language	
Publish?	<input type="checkbox"/>
Restrictions Apply?	<input type="checkbox"/>

Afar

Abkhazian

Achinese

Example of Language of Materials note: Materials in English and Dutch.

Dates:

The series date will be the full date range reflected in the item and file level inventory below (or if there is no inventory below, the dates you see reflected in all of the physical materials belonging to this series). The date label in ArchiveSpace is usually selected as "Creation." Every once in a while, we may use "Record Keeping" to specify a photocopied or file system date, but it's a case-by-case basis. We follow DACS for dates, so the date expression should go from general to specific (i.e. 1948 October 13). If the dates are a span of years, you don't record months or days in that span (i.e. 1948 October 13-1950 December 3 is wrong, it is simply 1948-1950). If the date is a span of months or days inside of a specific year, you do record those (i.e. 1948 October-November or 1990 September 1-15). This date expression in ArchiveSpace is the free form field:

*** Dates**

Label * Creation

Expression * between 1898 and 1908

Do NOT put a space on either or one side of the hyphens.

If the recorded dates are uncertain, the word “approximately” should be prepended to the date expression. Other phrases, such as “before,” “or” and “between” may be used, as well as references to decades or centuries (i.e. between 1910 and 1919 to indicate the 1910s). Date qualifying phrases should always be recorded in lower-case. If you have a specific but questionable date, it can have a question mark at the end of the expression (i.e. 1935 June 15?)

Unless otherwise directed, with reproductions (e.g., photocopies, transcripts, digital copies), you should record the creation date of the original version of the record rather than the date of reproduction. A note of the date of reproduction may be recorded in a **General Note** (see directions in the **General Note** section), but only go out of your way to record this note if it’s very clear what that reproduction date is.

If it is a single date, such as 1989 September 3, select Single from the drop-down menu. The other options are inclusive for a date span, and bulk.

Type * Single

Then, normalize the dates using the calendar. XXXX-XX-XX is the format. If you don’t use leading zeros to specify dates, the coding will throw an error. Make sure the calendar is pulling up your date and select that date!

*** Dates**

Label *

Expression *

Type *

Begin 1905-05-13

e.g. YYYY, YYYY-MM, or YYYY-MM-DD

« May 1905 »						
Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

If you just have a year, put that year in and don’t worry about selecting from the calendar. The year by itself won’t throw an error. However, say you have a date like 1989-09 with no day. Make SURE you put the leading zero on the month, otherwise it will make an error on the backend.

You might have more specific dates in legacy finding aids, such as a journal that goes from September 1, 1999 to September 1, 2000. You can put those more specific dates in the normalized calendar fields, but make sure the date expression only says 1999-2000.

There are three additional drop-downs after the calendar. The certainty field should be used if you approximated, inferred, or used a questionable specific date. If you did not do any of those things, select nothing.

The other two drop down-downs MUST be selected. Era is ce, and Calendar is Gregorian:

Certainty	<input type="text"/>
Era	ce
Calendar	Gregorian

If you have a span of dates for a collection and a smaller span of bulk dates, you make two date entries and specify one as inclusive, the other as bulk. If you have a significant gap in a date span, or two or three very spread out single dates, make separate date entries for each.

Extents:

Extents at the series level will add up all the file and item extents added below its level. In the example below, the extent is “7 folders.” Do not include any information in the Container Summary, Physical Details, or Dimension fields.

Box: 106 [31197239263723], Folder: 4
Box: 106 [31197239263723], Folder: 5
Box: 106 [31197239263723], Folder: 6-7; Box: 90 [31197239263566], Folder: 3-4
Box: 106 [31197239263723], Folder: 8

Extents	
Portion *	Whole
Number *	7
Type *	folders
Container Summary	<input type="text"/>
Physical Details	<input type="text"/>
Dimensions	<input type="text"/>

Agents:

Agents should be linked at the series level if they are a contributing creator of a series but are not listed at the collection level. For every agent you link that is different than what is reflected at the collection level, you must have an accompanying Biographical Note for that person/entity/family. An example is a collection of photographic postcards collected by a specific person, with different series for each photographer of those cards below. All of the creators of the collection would be listed at the collection level, but only the photographer and the collector would be listed in each relevant series. This difference requires the agents and biographical notes to be repeated so that only the relevant information displays.

Subjects:

Genre headings must be added at the series level, unless the series level you are working within contains all the same genre, and that heading has been added at the collection level. A form heading describes what something IS, not what it is about. Its format or purpose. A genre is more like a category of a type of something, like westerns or thrillers. However, Library of Congress frequently combines the two definitions. For instance, “poetry” is what you use for poems as a format or a genre.

You will add genre headings for anything that comprises at least 20% of the material at that level. If more than three related terms would be needed, a more general term should be used instead. (For instance, if you have programs, ticket stubs, and fliers, use ephemera). For item level description, you will add the genre heading that reflects that item. Start typing in what you think might be the correct term and see if it can be easily selected from the drop-down menu:

Subjects

Subject * tax re

- ✎ Tax returns
- ✎ Tax records

If you can't find it, use the Browse function and search by keyword. Then filter the results by selecting Genre/form under Term Type, and select the term you want. Then click “Link to Subjects.”

Subjects

Subject * Type to search available records..

+

Browse

Create

Browse Subjects

Filtered By

- Text: Clear All
- poetry ✕

Source

- Library of Congress Subject Headings 55
- Unspecified ingested source 12
- Library of Congress Name Authority File 1

<input type="radio"/>	Poetry		2
<input type="radio"/>	Poetry -- 20th century		2

Term Type (First)

- Topical 49
- Genre / Form 11
- Geographic 8

If you have a copy of something, you will add a genre heading for BOTH the copy and the genre/form of the item:

Subjects

☰

Subject * Photocopies

☰

Subjects * Letters

Common genre headings: "Letters" for handwritten correspondence; "Clippings (books, newspapers, etc.)" for pieces of newspapers, magazines, etc.; "Articles" for articles from journals or unspecified sources; "Carbon copies," Mimeograph copies," and "Photocopies" for common reproductions; "Notes"; "Notebooks"; "Research (Documents)"; "Lists"; "Legal instruments" used for legal documents; "Financial records"; "Receipts (Financial records)"; "Minutes (records)"; "Agendas"; "Photographs"; "Negatives"; "DVDs"; "CD-ROMs"; "Audiocassettes"; "Videocassettes"; "Motion pictures" for film; "Slides (Photography)"; "Postcards"

Sometimes when working with legacy description it can be so vague you can't add a heading, but for the most part it is possible. If you have a genre you need added to the ArchiveSpace heading list, let your supervisor know.

Notes:

Notes do not follow the [Title Style Cheat Sheet](#). They simply follow Turabian guidelines, many of which are similar:

- If professional titles precede a personal name, they are capitalized.
- Capitalize full names of legislative, administrative, and judicial bodies, major wars, and official course names.
- Do not capitalize academic disciplines and academic designations (e.g., "master's degree"), and omit periods from academic degree abbreviations (PhD, DDS)
- Spell out whole numbers from one to hundred, round numbers, and any number beginning a sentence
- Use numerals for units of measure, percentages, dates, and exact times (e.g., 5:36 p.m.; October 19, 1978)
- Numbers in their plural form are spelled out. Numerals form their plural by adding s with no apostrophe (i.e. thirties, 1950s)
- Do not use a dash if the word from or between is placed between the first of the two numbers; use through or to instead (e.g., from 1980 to 1995)
- *United States* used as a noun should be spelled out. Used as an adjective, it should be U.S.
- Acronyms should be used sparingly, but when used should appear in full capitals without punctuation. For clarity, spell out the acronym the first time you refer to it in the note (e.g., National Aeronautics and Space Administration, or NASA).
- Place periods and commas inside quotation marks
- Always spell out the full name of the Church of Jesus Christ of Latter-day Saints.
- Follow headline-style capitalization rules, including capitalizing all major words, including "a" "an" or "the" if it is the first word in the title. When listing periodicals, do not capitalize the leading "the" (i.e. the New York Times)
- Quotations around different types of titles are approved. In-line formatting in italics is too difficult to maintain in ArchivesSpace, so Turabian's rule of italics for book, journal, and newspaper titles and quotations for articles is not used. Do not copy straight from a Word document unless you have [disabled smart quotes in Microsoft Word](#).

Notes have individual check boxes indicating whether they should be published or not. Unless you have been given a good reason, make sure to check all these boxes. If a note at a level above your series indicated information applicable to every series below it, you do not need to repeat notes. Notes usually used at the file and item level do not need labels, so leave that field blank. The following notes are the most likely to be utilized at the series levels:

Conditions Governing Access: Restriction statements should include the reason the materials are unavailable, the duration of the restriction, and instructions on who to contact to request access. In most cases, this contact will Reference Services.

Examples:

Donor restricted until 2015. Permission to use materials must be obtained from Reference Services at specialcollections@byu.edu.

Restricted due to presence of social security numbers and medical records. Permission to use materials must be obtained from Reference Services at specialcollections@byu.edu.

Biographical/Historical Note: You will need this note if you are listing creators at the series level that are not included at the collection level. This is the one note that requires a label. If it's biographical (for a person or family), write "Biographical History" in the label. If it's Administrative (for a corporate body), write "Administrative History" in the label. Then record the note in the content field according to the directions found [here](#).

Existence and Location of Copies: If you have copies of materials, such as photocopies, transcriptions, digital scans, etc. their presence should be noted in an Existence and Location of Copies note, and NOT as their own separate archival object. Place this note at the level where the original is, and indicate what box and folder the copy is located in. This may mean containers that contain only copies within them are attached in an instance at the collection level, and not within the inventory below.

Example: Typescript of journal located in Box 5, folders 2-3.

Existence and Location of Originals: Every once in a while, you will use this note if the item being described at the series level has an original located elsewhere. It is usually at another institution.

General: This is the catch-all note. Anything that does not go in one of the other note fields should end up here.

The General Note is used to state where the title came from if it is a formal title being restated from the item or file. If the title is from the front of the item, use the phrase "Title from recto." If it is from the back, say "Title from verso." Otherwise, state the location the title was taken from, i.e., "Title from second page." "Title from original inventory." "Title from folder." You would use this example at the series level if every title below had the same general note to apply to all.

Examples of general notes at the series level:

Also contains undated material.

See Series 5 Subseries 3 for more information on these publications.

Digitized. Provo, UT : Brigham Young University, 2018.

Handwriting illegible.

Titles from folder.

Scope and Contents:

This note will summarize the nature and subject focus of the content found in the series. Try to include the following:

- Function(s), activity(ies), transaction(s), and process(es) that generated the materials being described;
- Documentary form(s) or intellectual characteristics of the records being described;
- Content dates;
- Geographic area(s) and places related to the content or production of the materials;

- Subject matter present in the materials, such as topics, events, people, and organizations;
- Gaps in the collection contents.

Subjects, formats, or other components of the note should have significant representation in the materials being described (i.e., at least 20 percent of the series). Scope and Content notes should not exceed one paragraph in length.

Example:

Collection title: Virginia Ruth Geisler Snarr family history collection

Series title: Kimball family history materials

Scope and Contents Note (Series): Materials include personal histories of Heber C. Kimball and his wife, Pearl Smith. These include letters written from both Heber and Pearl, photographs of their families and home, and biographies written about their lives. Materials were created by Heber, Pearl, and their descendants. Dated approximately 1865 to 1986.

Instances:

Instances will only go at the series level if there is no file or item inventory listed below that series. If there are already containers attached to a record, add the container number for the series by selecting the Type and then the Top Container. Select the Type “Text” for written/typed materials, “Graphic Materials” for photographs or other visual materials, “Audio” and “Moving Images” for audiovisual materials, “Computer Disks” for computer media, “Realia” for any kind of artifact, and “Mixed Materials” if you need to express a type that is more than one of these.

The screenshot shows a form titled "Instances". It has two main input fields. The first is labeled "Type" with a red asterisk, and its value is "Text". The second is labeled "Top Container" with a red asterisk, and its value is "Box 1: [31197231044469]". The "Top Container" field has a blue highlight and a small "x" icon on the right side.

If you are needing to add a Top Container that is not attached to the record, click “create” on the drop-down menu. This will pull up a menu where you fill out two things- Container Type selected from a drop-down menu (i.e. box, carton, etc.) and the Indicator, which will be the container number.

Create Top Container

The screenshot shows a form titled "Create Top Container". It has three input fields. The first is labeled "Container Profile" and contains the text "Type to search available records..". The second is labeled "Container Type" and has a red arrow pointing to it. The third is labeled "Indicator" with a red asterisk and has a red arrow pointing to it.

Then add the Child Type (if applicable) from the drop-down menu, and the Child Indicator, such as Folder and 1.

Child Type	Folder
Child Indicator	1

If you need to attach more than one container, or more than one Child Type, add another instance.

Child Type	Folder
Child Indicator	1
Grandchild Type	
Grandchild Indicator	
Add Container Instance	

If you need to express multiple of the same type of child containers, do so in the Child Indicator.

Child Type	Folder
Child Indicator	1-5

Grandchild Type and its Indicator are never used. Why this is an option in ArchivesSpace is unknown.

Physical processing:

If you are going to physically process at the series level, you are likely working with folders. If placing folders together in a box, make sure not to over or under-fill the box. Folders should easily slide out of the box when being used in the reference room, but also need to be properly supported inside the box. Folders should be labeled with pencil using this template:

Call Number	Title, date	Box	Folder
-------------	-------------	-----	--------

Oversize folders should be labeled on the edge that opens toward you.

If you are processing at the collection level and retaining old folders, usually with titles already on them, it is fine to use the shortened 1/1, 1/2 etc. to represent the box and folder numbers, especially if the older folders have smaller tabs without a lot of room.

Numbering: If series are the deepest level of description being utilized for the collection, we will not physically number any items with item numbers, or folders with file numbers.

Photographs: Sleeve photographs in as few sleeves as possible, using the multiple pocket pages to combine them together. Unless otherwise directed, photographs being separated out to the vault and large collections of photographs should be placed in letter size folders and letter-size boxes to minimize

the movement of the material. When envelopes instead of sleeves are chosen as the housing, buffered envelopes are for any kind of film material (such as negatives), and unbuffered are for prints.

Audiovisual material: Audiovisual materials will be housed according to the amount in a collection. If it's just one CD or audiocassette, these can go in an edged folder. If there is a lot of A/V, it may be housed by format to fit in special media boxes or packed in a carton.

The template spreadsheet for audiovisual material being sent to the lab to be digitized is found on the Central Processing Unit team board in Basecamp:

<https://3.basecamp.com/4193180/buckets/11418965/vaults/1674553508> Once this is filled out, it is uploaded to the relevant project in Basecamp.

*If you have audiovisual materials, these are always entered into the finding aid at the item level, regardless of whether the rest of the material in the collection is being described at that level. Refer to the Item and File Level Training Documentation to enter this material in below the series. This may mean a series has a few items entered below with attached instances, and the rest represented by instances at the series level.

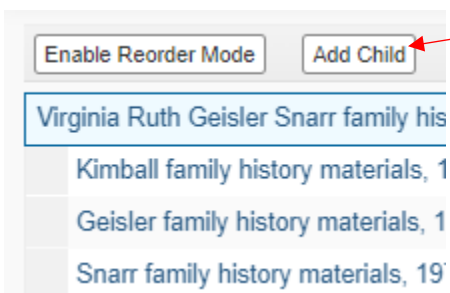
Other material: Place volumes, such as books, spine down inside folders, if they fit. Artifacts can often be wrapped in tissue and place in edged folders if they are small, or placed inside a spacer if one is being utilized with documents in a box. Otherwise, housing questions need to be referred to Conservation.

Multiple Series

If the processing plan calls for multiple series (it should call for at least two), then click "Add Sibling" while in the series above where you'd like the new series to be.



You can click "Add Child" at the collection level to add another series to the bottom of the list.



Subseries Description

Sometimes, a processing plan will call for subseries levels underneath the series. Click “Add Child” at the series level to add a subseries.



Enable Reorder Mode Add Child Add Sibling Load via Spreadsheet ?

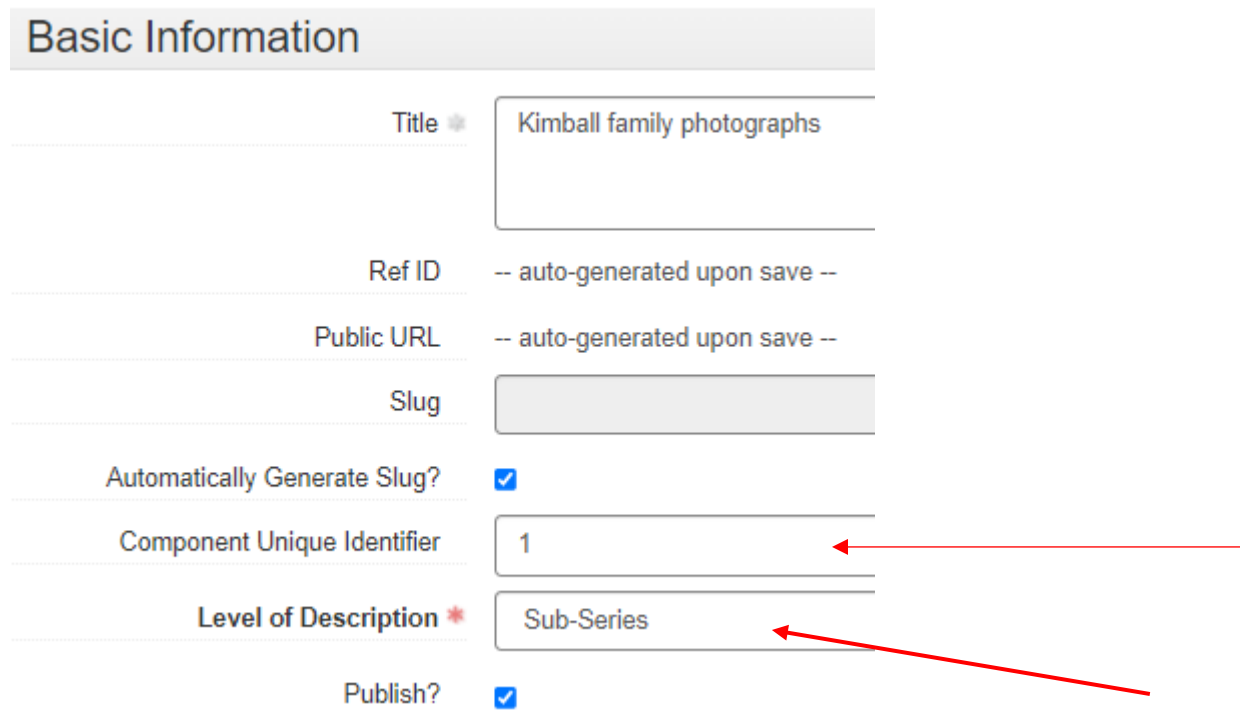
Virginia Ruth Geisler Snarr family history collection

- Kimball family history materials, 1865-1986
- Geisler family history materials, 1888-1978
- Snarr family history materials, 1978-2017

The level of description should be coded as “Sub-Series” in ArchivesSpace. The Component Unique Identifiers should be added numerically, similar to how the series are numbered.

Basic Information

Title *	Kimball family photographs
Ref ID	-- auto-generated upon save --
Public URL	-- auto-generated upon save --
Slug	
Automatically Generate Slug?	<input checked="" type="checkbox"/>
Component Unique Identifier	1
Level of Description *	Sub-Series
Publish?	<input checked="" type="checkbox"/>



Follow all the steps above to add similar metadata for the subseries.