

File- and Item-level Processing at the BYU Library Special Collections

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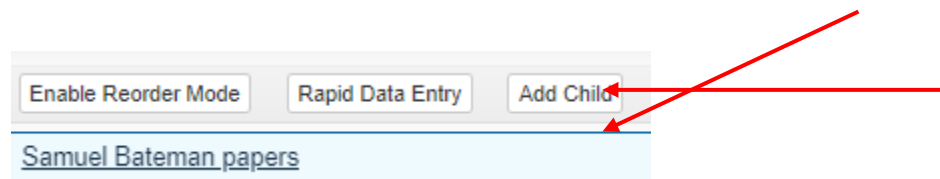
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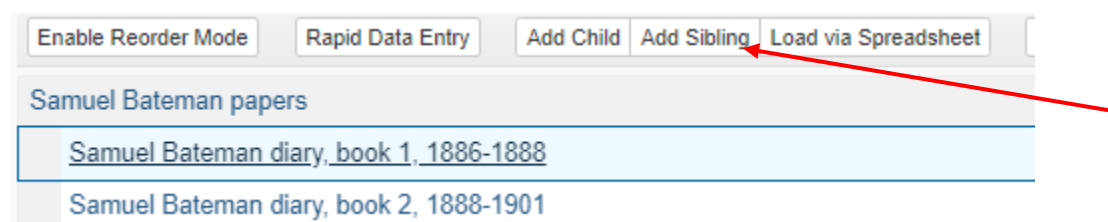
File- and Item-level Description

Adding Files and Items

Add an entry title by clicking "Add child" if you want to add a record hierarchically beneath the record you're currently in (a collection, series, subseries, or file):

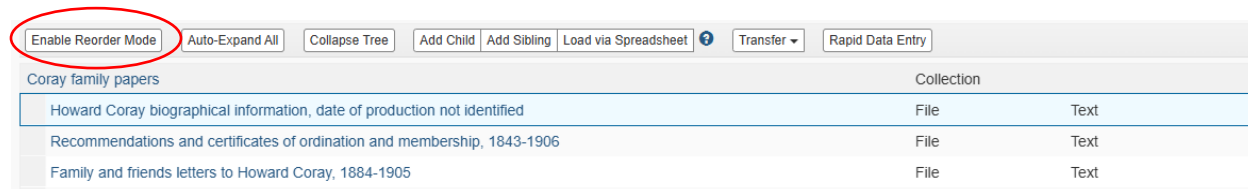


Or "Add sibling" if you want to add a record at the same level as the record you're currently in:

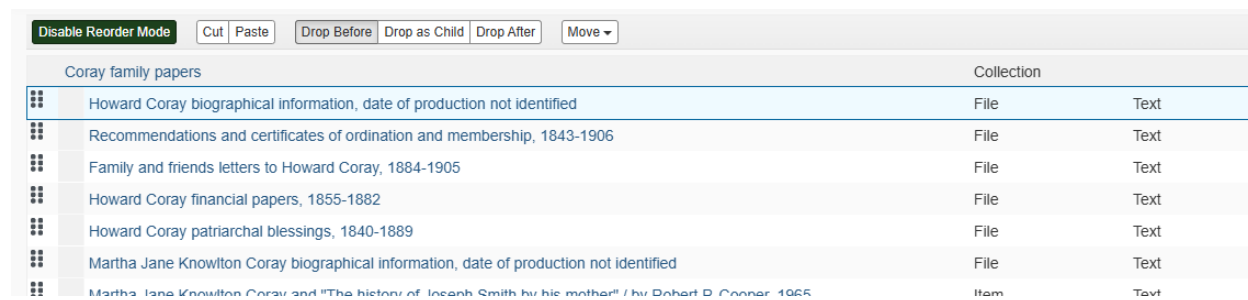


Reorder Mode

If, after creating files and/or items, you need to rearrange the order in which these records are represented in ArchivesSpace, turn on "Edit" mode for the record and select "Enable Reorder Mode."



This will bring up different options:



Selecting Record(s)

Select a record by selecting the title of the record.

Disable Reorder Mode				Cut	Paste	Drop Before	Drop as Child	Drop After	Move ▾
Coray family papers									
☰	▶	Howard Coray papers	Collection						
☰	▶	Martha Jane Knowlton Coray papers	Series						
☰	▶	Howard Knowlton Coray and Mary Elizabeth Lusk Coray papers	Series						
☰		Eugene Roberts letters and obituary, date of production not identified	File	Text	Box: 4, Folder: 7				
☰		Edna Coray Dyer biographical information, date of production not identified	File	Text	Box: 4, Folder: 8				
☰		Mary Elizabeth Lusk Coray autograph book, date of production not identified	Item	Text	Box: 4, Folder: 9				
☰		Select songs of praise, 1923	Item	Text	Box: 4, Folder: 10				
☰		A collection of hymns and anthems, set to music by home composers, 1883	File	Text	Box: 4, Folder: 11				

If you hold down the Control (ctrl) key on your keyboard, you can select and move multiple records at once.

Disable Reorder Mode				Cut	Paste	Drop Before	Drop as Child	Drop After	Move ▾
☰		Newspaper clippings on music, date of production not identified	File	Text	Box: 8, Folder: 5				
☰		Miscellaneous newspaper clippings, date of production not identified	File	Text	Box: 8, Folder: 6				
☰		Eugene Roberts letters and obituary, date of production not identified	File	Text	Box: 4, Folder: 7				
☰		Martha Jane K. Coray letter to Martha Jane Coray Lewis, 1880 November 9	Item	Text	Box: 8, Folder: 7				
☰		Genealogy papers on the Roberts family, date of production not identified	File	Text	Box: 8, Folder: 8				
1		Roberts family memorabilia, date of production not identified	File	Text	Box: 8, Folder: 9				
2		Biographical sketch of Orville C. Roberts, date of production not identified	Item	Text	Box: 8, Folder: 10				
3		Biographical sketch of Mary K. Coray Roberts, date of production not identified	Item	Text	Box: 8, Folder: 11				
4		Mary K. Coray Roberts letters, 1882-1922	File	Text	Box: 8, Folder: 12				
☰		Biographical sketch of Orville C. Roberts, Jr., date of production not identified	Item	Text	Box: 8, Folder: 13				
☰		Biographical sketch of Mary A. Roberts Cloward, date of production not identified	File	Text	Box: 8, Folder: 14				

The order in which you select the records will be the order in which they're rearranged after they're moved.

Disable Reorder Mode				Cut	Paste	Drop Before	Drop as Child	Drop After	Move ▾
☰		Newspaper clippings on music, date of production not identified	File	Text	Box: 8, Folder: 5				
☰		Miscellaneous newspaper clippings, date of production not identified	File	Text	Box: 8, Folder: 6				
☰		Eugene Roberts letters and obituary, date of production not identified	File	Text	Box: 4, Folder: 7				
☰		Martha Jane K. Coray letter to Martha Jane Coray Lewis, 1880 November 9	Item	Text	Box: 8, Folder: 7				
1		Genealogy papers on the Roberts family, date of production not identified	File	Text	Box: 8, Folder: 8				
5		Roberts family memorabilia, date of production not identified	File	Text	Box: 8, Folder: 9				
2		Biographical sketch of Orville C. Roberts, date of production not identified	Item	Text	Box: 8, Folder: 10				
6		Biographical sketch of Mary K. Coray Roberts, date of production not identified	Item	Text	Box: 8, Folder: 11				
3		Mary K. Coray Roberts letters, 1882-1922	File	Text	Box: 8, Folder: 12				
☰		Biographical sketch of Orville C. Roberts, Jr., date of production not identified	Item	Text	Box: 8, Folder: 13				
4		Biographical sketch of Mary A. Roberts Cloward, date of production not identified	File	Text	Box: 8, Folder: 14				
☰		Biographical sketch of Howard D. Roberts, date of production not identified	Item	Text	Box: 8, Folder: 15				

Disable Reorder Mode Cut Paste Drop Before Drop as Child Drop After Move ▾

☰	Newspaper clippings on music, date of production not identified	File	Text	Box: 8, Folder: 5
☰	Miscellaneous newspaper clippings, date of production not identified	File	Text	Box: 8, Folder: 6
☰	Eugene Roberts letters and obituary, date of production not identified	File	Text	Box: 4, Folder: 7
☰	1. Genealogy papers on the Roberts family Genealogy papers on the Roberts family, date of production not identified			Box: 8, Folder: 7
1	2. Biographical sketch of Orville C. Roberts Biographical sketch of Orville C. Roberts, date of production not identified			Box: 8, Folder: 8
5	3. Mary K. Coray Roberts letters Mary K. Coray Roberts letters, 1882-1922			Box: 8, Folder: 9
2	4. Biographical sketch of Mary A. Roberts Cloward Biographical sketch of Mary A. Roberts Cloward, date of production not identified			Box: 8, Folder: 10
6	5. Roberts family memorabilia Roberts family memorabilia, date of production not identified			Box: 8, Folder: 10
3	6. Biographical sketch of Mary K. Coray Roberts Biographical sketch of Mary K. Coray Roberts, date of production not identified			Box: 8, Folder: 11
☰	Mary K. Coray Roberts letters, 1882-1922	File	Text	Box: 8, Folder: 12
☰	Biographical sketch of Orville C. Roberts, Jr., date of production not identified	Item	Text	Box: 8, Folder: 13
4	Biographical sketch of Mary A. Roberts Cloward, date of production not identified	File	Text	Box: 8, Folder: 14
☰	Biographical sketch of Howard D. Roberts, date of production not identified	Item	Text	Box: 8, Folder: 15
☰	Biographical sketch of Harriet V. Roberts Steele, date of production not identified	Item	Text	Box: 8, Folder: 16

Disable Reorder Mode Cut Paste Drop Before Drop as Child Drop After Move ▾

☰	Newspaper clippings on music, date of production not identified	File	Text	Box: 8, Folder: 5
☰	Miscellaneous newspaper clippings, date of production not identified	File	Text	Box: 8, Folder: 6
☰	Genealogy papers on the Roberts family, date of production not identified	File	Text	Box: 8, Folder: 8
☰	Biographical sketch of Orville C. Roberts, date of production not identified	Item	Text	Box: 8, Folder: 10
☰	Mary K. Coray Roberts letters, 1882-1922	File	Text	Box: 8, Folder: 12
☰	Biographical sketch of Mary A. Roberts Cloward, date of production not identified	File	Text	Box: 8, Folder: 14
☰	Roberts family memorabilia, date of production not identified	File	Text	Box: 8, Folder: 9
☰	Biographical sketch of Mary K. Coray Roberts, date of production not identified	Item	Text	Box: 8, Folder: 11
☰	Eugene Roberts letters and obituary, date of production not identified	File	Text	Box: 4, Folder: 7
☰	Martha Jane K. Coray letter to Martha Jane Coray Lewis, 1880 November 9	Item	Text	Box: 8, Folder: 7
☰	Biographical sketch of Orville C. Roberts, Jr., date of production not identified	Item	Text	Box: 8, Folder: 13
☰	Biographical sketch of Howard D. Roberts, date of production not identified	Item	Text	Box: 8, Folder: 15

Drag and Drop Method

Grab the record you want to move by the six-dot icon on the left and drag it to its new location. In the screenshot below, the pinkish hovering rectangle is the item being moved.

Disable Reorder Mode Cut Paste Drop Before Drop as Child Drop After Move ▾

☰	Class and miscellaneous notes, date of production not identified	File	Text	Box: 7, Folder: 8
☰	Orpha Walker poems, date of production not identified	File	Text	Box: 7, Folder: 9
☰	Miscellaneous concert programs, 1903-1906	File	Text	Box: 7, Folder: 10
☰	Church of Jesus Christ of Latter-day Saints memorabilia, date of production not identified	File	Text	Box: 7, Folder: 12
☰	Calling cards, date of production not identified	File	Text	Box: 7, Folder: 13
☰	Cabinet organ warranty, date of production not identified	Item	Text	Box: 7, Folder: 14
☰	Newspaper clippings on the Church of Jesus Christ of Latter-day Saints, date of production not identified	File	Text	Box: 8, Folder: 1
☰	Newspaper clippings about friends and acquaintances of Edna Coray Dyer, date of production not identified	File	Text	Box: 8, Folder: 2
☰	Little red foot / by Robert Chambers, date of production not identified	Item	Text	Box: 8, Folder: 3
☰	Newspaper clippings on marriage, family, and children, date of production not identified	File	Text	Box: 8, Folder: 4
☰	Newspaper clippings on music, date of production not identified	File	Text	Box: 8, Folder: 5
☰	Miscellaneous newspaper clippings, date of production not identified	File	Text	Box: 8, Folder: 6
☰	Martha Jane K. Coray letter to Martha Jane Coray Lewis, 1880 November 9	Item	Text	Box: 8, Folder: 7
☰	1. Eugene Roberts letters and obituary Eugene Roberts letters and obituary, date of production not identified	File	Text	Box: 8, Folder: 8
☰	Roberts family memorabilia, date of production not identified	File	Text	Box: 8, Folder: 9
☰	Biographical sketch of Orville C. Roberts, date of production not identified	Item	Text	Box: 8, Folder: 10
☰	Biographical sketch of Mary K. Coray Roberts, date of production not identified	Item	Text	Box: 8, Folder: 11
☰	Mary K. Coray Roberts letters, 1882-1922	File	Text	Box: 8, Folder: 12

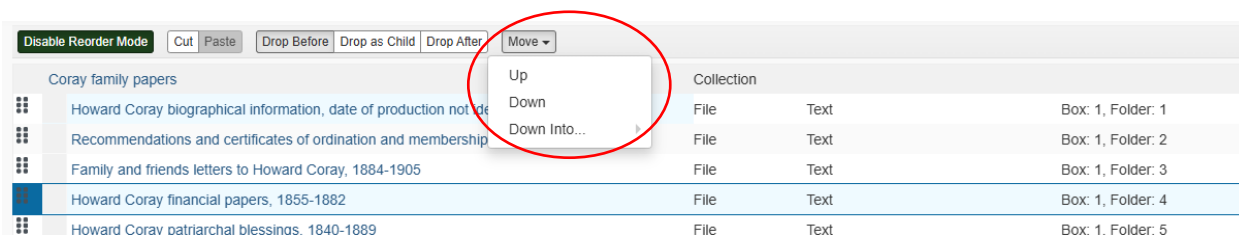
Drop Before vs. Drop After

If you have "Drop Before" selected, the record(s) you've selected will move to directly before the record you drop them on. If you have "Drop After" selected, the record(s) will move to directly after the record you drop them on.

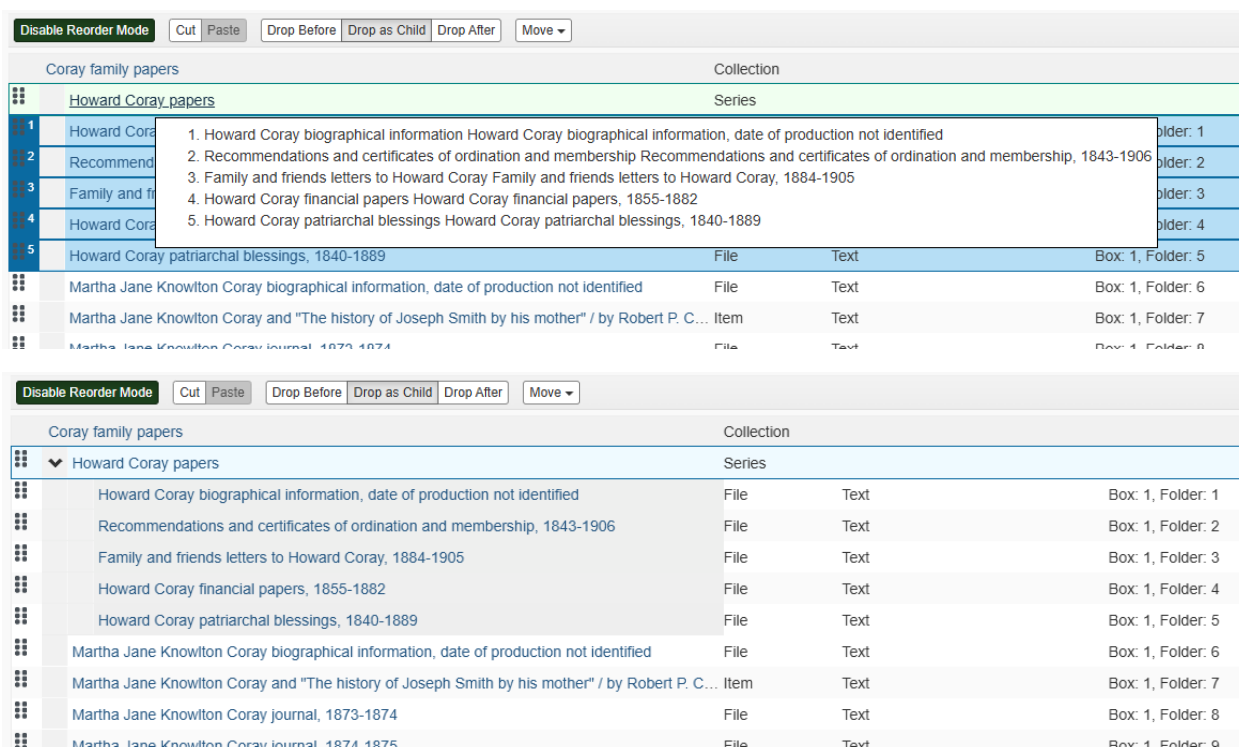


Move Up or Down Method

While you have a record selected, you can also select "Move" and then "Up" or "Down" to move the record up or down one record in the sequence. Note that you can only move one record at a time this way.

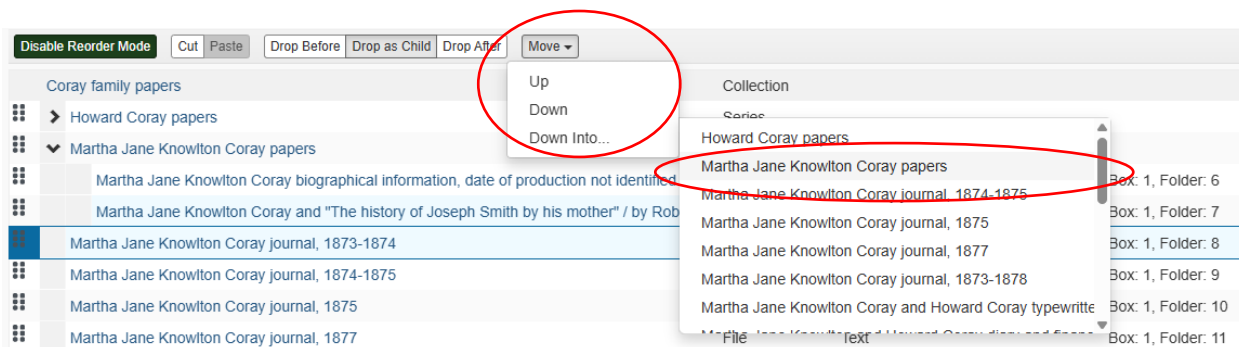


If you have "Drop as Child" selected, the record(s) you've selected will drop the record(s) hierarchically underneath (or as a child record(s) under) the record you drop them on. If there are already child records in this destination, the new records will be added after the existing records.



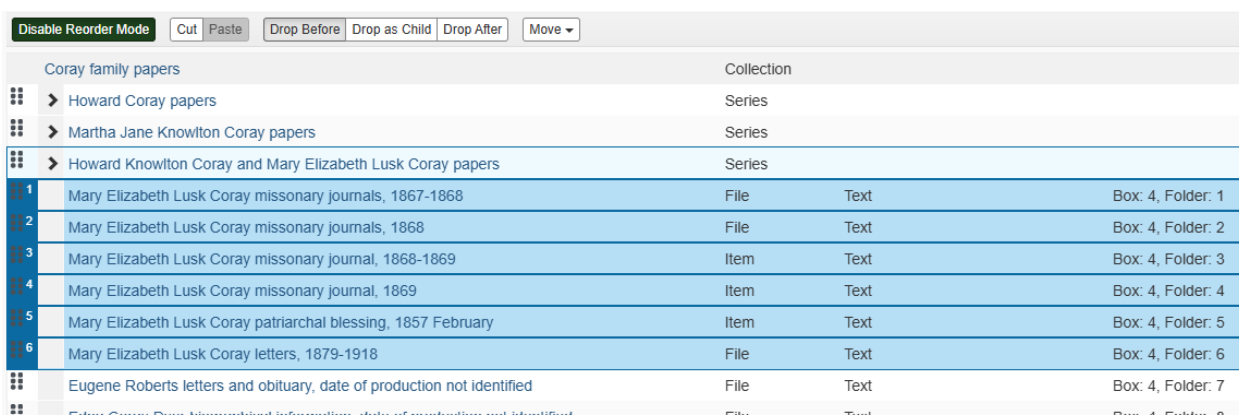
Move Down into Another Record Method

While you have a record selected, you can also select "Move" and then "Down Into..." and then select a record to drop the record hierarchically underneath (or as a child record under) the record you've selected. Note that you can only add one record at a time this way. If there are already child records in this destination, the new records will be added after the existing records.

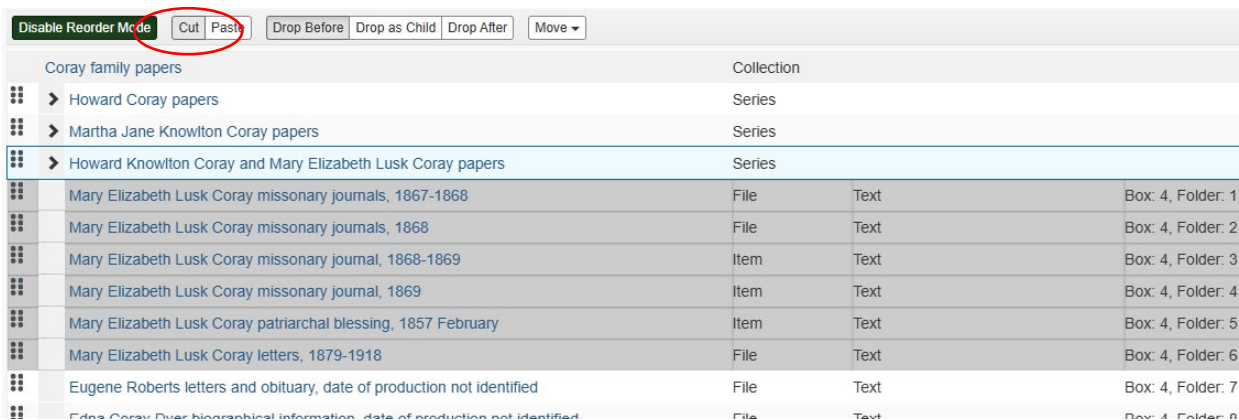


Cut and Paste Method

You can also select a record (or records) and cut and paste them to a new record to add them as a child record(s) under the destination record.



Select the record(s) then click "Cut." The records you've cut will turn grey.



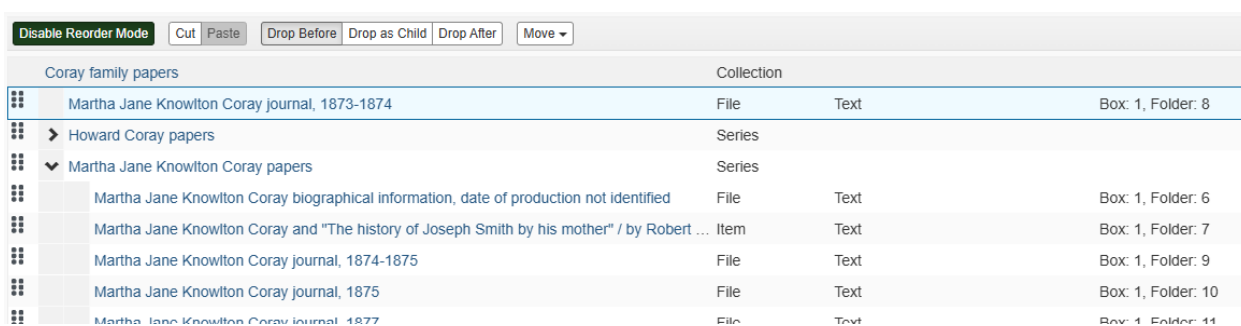
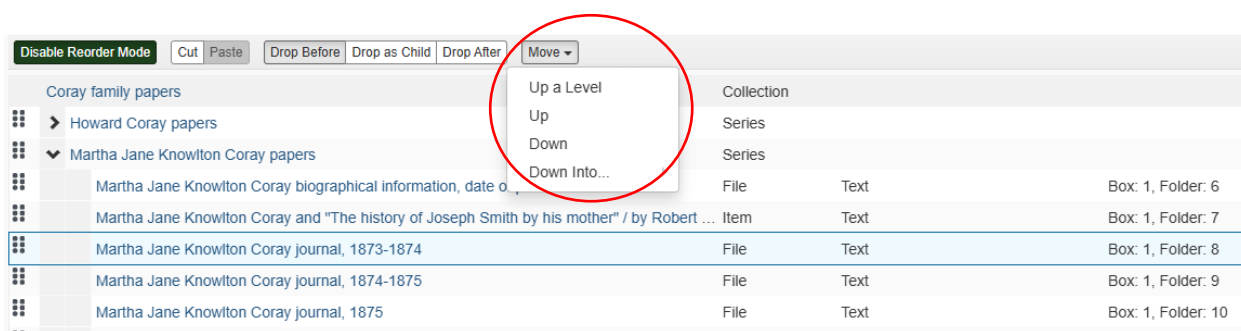
Select the record where you'd like to move them and click "Paste."



The records will be pasted after any existing child records.

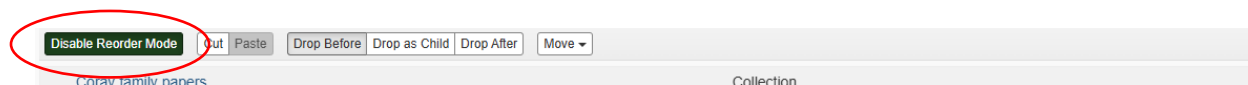
Move Up a Level Method

If you need to move a record from being a child record to being a sibling record to the current parent record, you can drag the record or you can select "Move" and then "Up a Level." Note that moving a record up a level will drop it at the beginning of the sequence of records at that level.



Returning to Record Creation/Record Edit Mode

Select "Disable Reorder Mode" to return to being able to create and edit records.



Titles

There are two ways to record a title, *devised* and *formal*.

Devised Titles

If there is no formal title on an item, you need to devise a title using the following pattern:

- [creator] [format] [topic]

Names in devised titles should be recorded using the authorized form of the name in direct order for those with established name headings or using the most common form of names in their official language for those that are not. To look up the authorized form of the name, look up the name in the [Library of Congress Name Authority File](#). This is especially important if there are similar family names used throughout the collection in various forms such as with and without initials and suffixes. If the collection has two or more creators with the same last name, do not combine the last name in the title (e.g., Vasco Tanner and Annie Tanner papers). Qualifiers used in authorized access points should be excluded, except in cases where their omission would be misleading (e.g., Mrs. Robert Henrey, Joseph Smith, Jr.). If commas are present in the name, they should be utilized in all fields of the finding aid. Utilize commas for qualifiers for names not established as well, to maintain consistency with the established pattern in Library of Congress. For corporate bodies with subordinated headings, only the subordinate unit's name should be included (e.g., "Marriott School of Business" is used for "Brigham Young University. Marriott School of Business") If the materials described were created by a corporate body that changed names over the time period represented in the materials themselves, record the most recent name used by the body during that period. Sometimes the creator isn't known—if the name of the creator is unknown, do not include a creator component in the title. Refer to the [Biographical and Administrative Histories training documentation](#) for further information on creators.

In the segment of the title for the nature of materials, generally a content designation (i.e., genre or form) term will be preferred over a reference to the materials' carrier (e.g., "diaries" instead of "microfilm"). However, in cases where the carrier is important for differentiation, or for reflecting the materials' arrangement, such terms may be used. If there are multiple material types present in a file or item, two terms may be used in the title (e.g., Hudson family ambrotypes and daguerreotypes). If more than two material types are present, use a more general term (e.g., "Office of the President administrative records" instead of "Office of the President agendas, minutes, and personnel records"). We use "papers" (for personal materials), "records" (for organizational records), or "collection" (for materials aggregated by topic or material form) as the most general terms as appropriate.

The topic portion is optional and often isn't needed or known, particularly at the collection, series, and subseries level but may be more applicable at the file and item level.

For untitled creative works (e.g., essays, short stories, poems), the term "untitled" may be included in the devised title to indicate the lack of a formal title (see [DCRM\(Mss\) 1B1.2.3](#)).

If a title is difficult to form, it's likely the overall arrangement of the collection should be adjusted, or the relationship of the materials within a grouping is too weak and should be split apart and described separately.

Follow the [Title Style Cheat Sheet](#) for guidelines on capitalization and punctuation.

Examples of correctly formulated devised titles include:

- Arnold Friberg paintings for Pride and prejudice
- Edgar Snow photograph of soldiers

- Edgar Snow photograph of Muslim soldiers in Zhongguo ren min jie fang jun
- James Stewart papers on It's a wonderful life
- John L. Weenig and Lucile McAllister Weenig photographs and negatives

Oral Histories

Record a devised title to describe the interview. Titles should be devised according to the guidelines in OHCM 2.1, and include the following components:

- The nature of the materials present (i.e., Oral history interview with)
- The name of interviewee(s)

Names in titles should be recorded using the authorized form of the name in direct order for those with established name headings, or using the most common form of names in the language of the person's country of residence or activity for those that are not. Qualifiers used in authorized access points should be excluded.

Titles should be recorded using sentence case, using the [RDA Capitalization Guidelines](#).

Example of devised oral history titles:

- Oral history interview with Algie E. Ballif

Correspondence

When describing correspondence at the item level, we follow this structure to make sure correspondence is described consistently:

- [sender] letter to [recipient]

If important, the locations of the sender and recipient can be included in the following format:

- [sender], [location], letter to [recipient], [location]

The location should include the city and state if that information is available or can be clearly confirmed. If you don't have a piece of information, leave out that portion and follow the rest of the formula. If your only information is that the recipient is a sister or friend (such as "Signed, your friend" or addressed "To my friend," not an assumption that a friend sent the letter), that information can substitute a formal name.

Examples:

- Karl G. Maeser letter to Angus M. Cannon
- Karl G. Maeser, Provo, Utah, letter to Angus M. Cannon, Salt Lake City, Utah
- Karl G. Maeser letter
A letter for which no recipient is determined
- Karl G. Maeser letter to friend
- Letter to Angus M. Cannon
A letter for which no sender is determined

If you have multiple letters in a file level description going back and forth between multiple recipients, just say "letters" and describe the letters as a whole if there are common senders, topics, places, etc.

Examples:

- Kane family letters
Multiple family members sending to and from each other
- Joseph Kane and Betty Miller letters
We know the recipients, but not the direction the letters were sent or received in
- Joseph Kane letters on land ownership
We know the sender and an overarching topic

Formal Titles

Formal titles are provided on the item itself or, sometimes, on another source of information like an inventory. Collection materials have formal titles on their title page, label, etc. Common preferred sources of information for titles include:

- Volumes, sheets, or cards: Title page, title sheet, or title card
Other options (in order of preference): Cover or jacket, caption, masthead, colophon
- Moving images: Title frame or title screen
Other options (in order of preference): Attached label on media, media container, disc menu
- Other physical formats: Attached label on media, an internal source, container
- Other online resources: Textual content, embedded metadata
- Inventories, legacy metadata of sorts

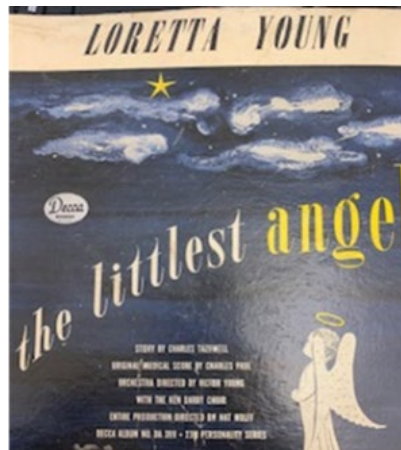
If the material has a formal title, it should be formatted as follows: [formal title, capitalizing the first word and only proper nouns thereafter] / [the word "by" or "edited by" etc. if it's on the item] [author].

- Incorrect: "Hearts and Flowers" by Helen Foster Snow
Should be: Hearts and flowers / by Helen Foster Snow

Note where the title came from in a General Note (see the [General Note section](#) for directions on this). Names in formal titles should be recorded using the form of the name as it appears in the title. In cases where the formal title includes dates, these should be retained in the title. For items that do not have a collective title, but include formal titles for their component parts, transcribe the titles of the parts from the item in the order they appear. Titles should be separated by a period-space. Capitalization and punctuation rules come from RDA and local practice and are intense. Follow the rules as best you can. See [Title Style Cheat Sheet](#) for the guidelines.

Examples of formal titles:

- The littlest angel / Loretta Young.
Accompanying General Note: Title from cover.
- A short history of the Hellewell family
Accompanying General Note: Title from page 1.
Accompanying General Note: Typescript (photocopy).
- Chapin, Idaho news, 1909-1957
Accompanying General Note: Title from cover.
- Summary of accomplishments / by Gerrit W. Gong
Accompanying General Note: Title from folder.
- BYU freshmen traditions / by Robin Horn
Accompanying General Note: Title from title page.
- Sumpter Valley Railroad history
Accompanying General Note: Title from recto.
- Sermones en lengua Cakchiquel / escritos por varios padres de la Orden de San Francisco y recogidos por el M. R. M. Padre Fr. Baltasar de Alarcon, procurador general de la misma orden
Accompanying General Note: Title from title page.
- Chain emails : the new face to face folklore / Jason Hess
Accompanying General Note: Title from title page.
- Spring Dell, Provo Canyon
Accompanying General Note: Title from lower margin.
- Your show must go on / by Peggy S. Worthen. Gathering: education in a compact society / by Elder Kevin J. Worthen
Accompanying General Note: Title from disc label.



If you can't read the title or part of the title, you can use substitute the missing word or part of the word with a lacuna ([...]). Then indicate in a general note why the title was illegible (e.g., torn page, photocopy cut off, handwriting illegible etc.).

If you can't read a lot of the formal title, or the formal title is very misleading or inaccurate, decide whether a devised title might be more helpful to a patron. The formal title that is not used can be placed in a general note if needed, or if you cannot read the formal title, a comment in the general note can indicate why you did not use the formal title i.e., "Title of the plays are illegible" or "Handwriting of title illegible."

Examples:

- Photograph of John Thornton
Accompanying General Note: Alternative title from back of photograph: You know who this is.
- Recording of Ernest L. Wilkinson speech on politics
Accompanying General Note: Title on case is illegible.

- File title: Photocopies of Brigham Young University records of early history
Accompanying General Note: Alternative title from original folder: Deed of Trust, 1875; Board of Trustees Minutes, 1875-1904; Deed, 1890; BYA Articles of Incorporation, 1996.

Supplied Titles

In legacy finding aids, formal titles are often set apart with capitalization, italics, or quotes. For some items and folders, there isn't a formal title that was recorded on it by a publisher, author, etc. but there was a title given to either a container (such as a box, envelope, or folder), or an inventory was originally created by a previous processor or the creator or collector of the materials. Per curator direction, these titles are sometimes preserved and used instead of formal or devised titles.

When preserved, a [General Note](#) should indicate where the title came from, or, if the title is standardized or changed upon review of physical materials or otherwise changed because the description is misleading, add a general note that indicates what the alternative title was from the original inventory. Occasionally, the legacy finding aid can be used as a source of formal titles, and the accompanying general notes can read "Title from inventory." If titles are changed consistently throughout a collection (e.g., correcting spelling errors, standardizing names to the authorized form, spelling out acronyms), this can be noted in the processing note, eliminating the need for alternative title notes on each file/item.

If the legacy finding aid gives you a formal title and then additional information about the item, this information should be cut into a [Scope and Contents Note](#) instead.

Examples:

- Original folder title (created by creator of collection): OGH correspondence 1994
File title: Orrin G. Hatch correspondence 1994
Accompanying General Note (at file level): Title from original folder.
Processing note (at collection level): Processed; Anne Ashton; 2030. File titles throughout the collection come from the original folder titles, but initials are expanded to the person's full name.
- Inventory title: Personal correspondence
Original folder title: E.L. Wilkinson - Personal
File title: Personal correspondence
Accompanying General Note (at file level): Title from inventory
Accompanying General Note (at file level): Alternative title from original folder: E.L. Wilkinson – Personal
- Original folder title: Jeffrey R. Halland speech
File title: Jeffrey R. Holland speech
Accompanying General Note: Title from original folder. Name has been updated to correct spelling errors.

Component Unique Identifier

For items and files, this field will contain a unique number for that file or item within each level of description (i.e., under the series, subseries, etc. level). For instance, this is the first item under Series 1:

Title *	Abraham Owen <u>Woodruff</u> journal
Ref ID	3c30eaad19e9741310f59c192a83b263
Component Unique Identifier	1

And this is the first item under Series 2:

Title *	Abraham Owen Woodruff dried plant scrapbook
Ref ID	9a5de285c3767b0415ad8c5775f401ae
Component Unique Identifier	1

If these were two objects under the collection level, it would be identifiers 1 and 2 instead. You can see how this makes a unique string of identifying numbers on the public-facing side of ArchivesSpace:

Abraham Owen Woodruff journal, 1894 January-October

Item – Box: 1, Folder: 1 Identifier: Vault MSS 777 **Series 1 Item 1**

Files have their own set of unique numbers under each level of description, and items have another set. You can see in the screenshot below that the file and item numbering run parallel, with File 1, then Item 1, then Item 2, and then File 2.

▼ Helen Foster Snow papers on family history, genealogy, and early life, 1924-1999	Sub-Series	Text, Text	Box: 212 [31197233644001], Fol... 1
Hearts and flowers : the case of a small town and a missing heart / by Nym...	File	Text	Box: 1 [31197227635783], Folder... 1
Hearts and flowers : the case of a small town and a missing heart / by Nym...	Item	Text	Box: 1 [31197227635783], Folder... 1
Last of the old Connecticut yankees, as told to Helen Foster Snow, 1980	Item	Text	Box: 1 [31197227635783], Folder... 2
Songs and poems about shoreline towns in Connecticut, 1994-1995	File	Text	Box: 1 [31197227635783], Folder... 2

See [Level of Description](#) (below) for determining whether the materials are a file or an item. Refer to the [Housing and physical processing document](#) for information on how these numbers are represented on physical containers and individual items.

Component Unique Identifier Exceptions

Photographs in a collection are sometimes—especially in legacy collections—numbered straight through every level of description (e.g., 1 to 100,000 etc.) to make it easier to tie them back to negatives. In this case, the negatives will be numbered with the same number followed by "N" (e.g., the photographs will be 1, 2, 3, etc. and the corresponding negatives will be 1N, 2N, 3N, etc.). If the

negatives are being described at an item level separate from the corresponding prints, the "N" should be included in the Component Unique Identifier field.

Audiovisual materials are assigned AV numbers (AV001, AV002, AV003, etc.) either from the item or the MDA. Record the whole AV number in the Component Unique Identifier field. Do not record a space after "AV."

Sometimes creators of collections have already assigned unique IDs to their materials, so the curator may request these numbering systems be kept. (For instance, the Fred Crook papers numbers its notecards with an ID that Crook made up, which looks like this: 1923-A-1, 1952-J-3, etc.)

External ARK URL

An ARK may be added at this level if deemed appropriate by the processor, the Digital Metadata Librarian, and the Digital Preservation Specialist. Some reasons to put an ARK at this level may include but are not limited to when there are digital objects scattered throughout a collection, when nothing is likely to be added to a collection, or if the file/item is the only digital object in the collection. Discuss with your supervisor, the Digital Metadata Librarian, and the Digital Preservation Specialist to determine if putting ARKs at this level is appropriate.

For instructions on how to mint ARKs, see the [ARK Minting documentation](#).

Level of Description

Below the collection, series, and sub-series levels, choose either file or item level description for each record:

The image shows a dropdown menu titled "Level of Description *". The menu is open, showing several options: "Class", "Collection", "File", "Fonds", "Item", and "Other Level". The "Item" option is highlighted in blue, indicating it is the selected choice.

File Level

File-level refers to an organizational structure and has nothing to do with a folder. File-level means the record encompasses different pieces of information, that is, that it's an aggregate of multiple items. The pieces of information have different functions and often different dates, clearly separating them from one another. However, the word "file" generally refers to related documents that are kept together in one or a few folders.

If, looking at a legacy finding aid, you see that an archival object is described in the plural and is composed of an entire folder, or several folders, it should likely be coded at the file level:

University of Utah papers, 1882-1927		Series		
	University of Utah lecture notes	File	Text	Box: 33 [31197230227594], Folder: 1-4
	University of Utah lecture notes	File	Text	Box: 34 [31197230227404], Folder: 1-5

During migration, it might be difficult to tell whether something is file- or item-level description because the description could be poor. For instance, coding this circular as a file was a good guess because the description was in a folder by itself, the date range spans 2 years, and the objects around it were files. We'll fix it if it's wrong in the physical review.

University of Utah circular, 1894-1895	File
--	------

For larger collections (particularly large University Archives collections) you can, with curator approval, decide to describe a section of a collection or a whole collection as files instead of needing to switch back and forth between files and items depending on the number of materials in a folder (or other container). This makes the most sense for collections composed of an individual's or corporate body's filing system—where the materials were intended as a file but some files may happen to have only a single item.

Item Level

An item is something that is complete in itself, usually with one function. It could be 1000 pages of one publication separated into 5 folders; a letter, an included photograph, and the envelope it came in; 1 photograph; or 1 artifact. Often, item-level descriptions will share a folder:

Joseph F. Merrill pamphlets, 1916-1928	Series		
President flag day address with evidence of Germany's plans, 1917	Item	Text	Box: 28 [31197230227487], Folder: 1
German treatment of occupied territory / edited by Dona C. Muro, ...	Item	Text	Box: 28 [31197230227487], Folder: 1
War, Labor, and Peace / by President Wilson, 1918	Item	Text	Box: 28 [31197230227487], Folder: 1

If there are multiple copies of an item (including a photocopy or even a transcript), they can still be coded as a single item. Add a general note to indicate the presence of multiple copies.

Publish Box

Check this box to make sure the file- or item-level record is visible to patrons. Most file- and item-level records will be published. Generally, if a record is supposed to be unpublished, this will be specified in the processing plan. If you feel a file or item should be unpublished but it's not specified in the processing plan, discuss this with your supervisor and the curator.

Unpublished Records Analytics Flags (Staff Only)

The only records that should not be published are restricted materials flagged by Records Analytics in University Archives collections. Refer to the [University Archives Processing Workflow](#), [University Archives Flag Processing Workflow](#), and [Flag Processing example](#) documents for more information.

Restrictions Apply? Box

This box should be checked if there are any restrictions for the file or item and then at all levels above it. The Reference desk has asked that the box be checked in all of these places so that ArchivesSpace flags it appropriately. If this box is checked, details about access restrictions should be recorded in a [Conditions Governing Access note](#), though the corresponding Access note can be inherited—it needn't be restated at this level in order for the Restrictions apply? box to be checked. See that section for more directions.

Restrictions Apply? ←

In the example below, the collection is composed of three series: two series of family and personal papers and one of photographs. The photographs series is further divided into subseries and then described at the file and item level below those subseries. The collection-level record has an Access note summarizing the access restrictions throughout the whole collection, and then each series-level record has an Access note describing the access restrictions specific to that series, which is then inherited to the subseries-, file-, and item-level records below. Because all of the materials in series 3 (the photographs series) are kept in cold storage, the "Restrictions Apply?" box should be checked in the record for series 3 and then again at every subseries-, file-, and item-level record below. Because all of the materials in series 1 and 2 are not stored in cold storage and are "Open for public research" the box should not be checked for the records for series 1 or 2 or any of the subseries-level records below those records. The "Restrictions Apply?" box should also be checked on the collection-level record because it is a level above the materials that have a restriction in place, and therefore the description includes these materials, even though it also describes materials that are not restricted.

Rhoads and Morley families papers	Collection
▼ Rhoads family papers, 1881-1986	Series
Dorothy Rhoads correspondence, 1888-1986	Sub-Series
Rhoads family diaries, 1909-1944	Sub-Series
Dorothy Rhoads writings and drafts, 1908-1970	Sub-Series
Dorothy Rhoads personal papers, 1903-1986	Sub-Series
Rhoads family scrapbooks, 1881-1916	Sub-Series
Rhoads family history and genealogy, 1881-1940	Sub-Series
► Sylvanus Griswold Morley papers, 1915-1955	Series
▼ Rhoads and Morley families photographs, approximately 1850-1976, bulk: approximately 1880-1950	Series
► Rhoads family photographs, approximately 1850-1976	Sub-Series
► Sylvanus Griswold and Frances R. Morley photographs, approximately 1910-1971	Sub-Series
► Rhoads and Morley families photograph albums, approximately 1880-1930	Sub-Series
► Rhoads and Morley families album duplicate photographs, approximately 1910-1930	Sub-Series
▼ Rhoads and Morley families over-sized prints, approximately 1850-1950, bulk: approximately 1910-1930	Sub-Series
Frances Rhoads Morley nature prints, approximately 1930-1950	File
Frances Rhoads Morley archaeology prints, approximately 1910-1930	File
Frances Rhoads Morley hacienda prints, approximately 1910-1930	File
Family portraits, approximately 1910-1930	File
Frances Rhoads Morley Maya people prints, approximately 1910-1930	File
Rhoads family prints, approximately 1910-1930	File
Rhoads family class photographs, approximately 1910-1930	File
Rhoads family prints, approximately 1910-1930	File

Language

If a file or item contains materials in a language other than the language that was selected at the level of description above it, it will need to be pointed out at the file or item level. Use the drop-down menu to select the appropriate language.

If there are multiple languages present in the file or item, select "Multiple languages" then add more language drop downs for each language present. A [Language of Materials note](#) will also need to be

added (e.g., Materials in English and Dutch). Language information should only be recorded if there is significant representation in the materials being described.

Sadly, if "Multiple languages" (and the other language drop-downs and Language of Materials note) are coded at the collection, series, subseries, etc. level, *every single* item and file below that record for which the same language information doesn't apply will need a drop-down selection coded to specify the language of materials. Often these rules of inheritance can be used to more effect and more efficiently by coding language at the narrower levels of description. If, for instance, most of a subseries is in English but a selection of files are in Spanish and English, those files can be coded as Spanish and English and the subseries coded as English (instead of Multiple languages) so that English will inherit as the language for the rest of the files in the subseries, instead of needing to code each individual file as English.

Dates

The date label in ArchiveSpace is usually selected as "Creation." 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, 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 inside of a specific year or a span of days inside a specific month, do record those (i.e., 1948 October-November or 1990 September 1-15). The Date Expression in ArchivesSpace is a free form field:

Do NOT put a space on either or one side of 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., "1910-1919," "between 1910 and 1919," or "1910s" may be used to indicate the 1910s). Date qualifying phrases should always be recorded in lower-case. Legacy description may include the phrase "date of production not identified" in place of an approximate date—this can be recorded in the Date Expression field, with an estimated date or date range recorded in the coded field below.

Unless otherwise directed, reproductions (e.g., photocopies, transcripts, digital copies), 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.

Select the type of date (i.e., "Single" or "Inclusive Dates") from the drop-down list. Select "Single" if the date has only one value, such as "1989 September 3" or "before 1932". If the date has two values, such as "1875 June 2-10," "1910s," or "approximately 1960-1965," select "Inclusive Dates" from the drop-down menu. "Bulk" should only be used as a secondary date statement (discussed below).

Type *

Enter the date(s) in the ISO 8601 coded format: XXXX, XXXX-XX, or XXXX-XX-XX (including dashes). If you don't use leading zeros to specify dates, the coding will throw an error. A calendar will pop up—if you're selecting a specific date, you can select that date on the calendar or continue to type it in.



The screenshot shows a form titled "Dates" with the following fields and values:

- Label ***: (empty)
- Expression ***: (empty)
- Type ***: (empty)
- Begin**: 1905-05-13

A calendar for May 1905 is displayed, with the date 13 (Friday) selected. Below the calendar, the text "e.g. YYYY, YYYY-MM, or YYYY-MM-DD" is visible.

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."

Label *	Creation
Expression *	1999-2000
Type *	Inclusive Dates
Begin	1999-09-01 
	e.g. YYYY, YYYY-MM, or YYYY-MM-DD
End	2000-09-01 
	e.g. YYYY, YYYY-MM, or YYYY-MM-DD
Certainty	
Era	ce
Calendar	Gregorian

There are three additional drop-downs after the calendar.

If the dates recorded are uncertain, this should be indicated in the Certainty field with the appropriate type: approximate or inferred. An approximate date is used when you can estimate the date with reasonable confidence, but cannot determine the exact year, month, or day, such as using clues from the fabric, paper style, or wood. An inferred date is a date you derive from evidence not explicitly stated—you deduce it logically from context, such as the content of a photograph. If the date is not uncertain, leave this drop-down blank.

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

Certainty	
Era	ce
Calendar	Gregorian

It's unusual for files and items, but 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, you may make separate date entries for each.

Some examples of date statements:

- Creation approximately 1895
Single
1895
approximate
ce
Gregorian
AND
Creation
1970-1973
Inclusive Dates
1970
1973

--
ce
Gregorian

- Creation 1997-1999
Inclusive Dates
1997
1999

--
ce
Gregorian

- Creation 1910s
Inclusive Dates
1910
1919
inferred
ce
Gregorian

- Creation before 1942
Single
1942
inferred
ce
Gregorian
- Creation approximately 1876-1878
Inclusive Dates
1876

*** Dates**
Add Date

☰

Label * Creation ✕

Expression * 1895

Type * Single

☰

Begin 1895 📅
e.g. YYYY, YYYY-MM, or YYYY-MM-DD

Certainty Approximate

Era ce

Calendar Gregorian

☰

Label * Creation ✕

Expression * 1970-1973

Type * Inclusive Dates

☰

Begin 1970 📅
e.g. YYYY, YYYY-MM, or YYYY-MM-DD

End 1973 📅
e.g. YYYY, YYYY-MM, or YYYY-MM-DD

Certainty

Era ce

Calendar Gregorian

+

*** Dates**
Add Date

☰

Label * Creation ✕

Expression * before 1942

Type * Single

☰

Begin 1942 📅
e.g. YYYY, YYYY-MM, or YYYY-MM-DD





Certainty Inferred





Era ce

Calendar Gregorian

- 1878
approximate
ce
Gregorian
- Creation
1870-1940
Inclusive Dates
1870
1940
--
ce
Gregorian
AND
Creation
1920-1940
Bulk
--
ce
Gregorian
 - Creation
1981 April-August
Inclusive Dates
1981-04
1981-08
--
ce
Gregorian
 - Creation
1999-2000
Inclusive Dates
1999-09-01
2000-08-31
--
ce
Gregorian
 - Creation
1971 or 1972
Inclusive Dates

1971
1972
Inferred
ce
Gregorian

	Label *	Creation	
	Expression *	1870-1940	
	Type *	Inclusive Dates	
	Begin	1870 	
		e.g. YYYY, YYYY-MM, or YYYY-MM-DD	
	End	1940 	
		e.g. YYYY, YYYY-MM, or YYYY-MM-DD	
	Certainty		
	Era	ce	
	Calendar	Gregorian	

	Label *	Creation	
	Expression *	1920-1940	
	Type *	Bulk Dates	
	Begin	1920 	
		e.g. YYYY, YYYY-MM, or YYYY-MM-DD	
	End	1940 	
		e.g. YYYY, YYYY-MM, or YYYY-MM-DD	
	Certainty		
	Era	ce	
	Calendar	Gregorian	

- Creation
2006 January 9-18
Inclusive Dates
2006-01-09
2006-01-18
--
ce
Gregorian
- Creation
1918-approximately
1934
Inclusive Dates
1918
1934
approximate
ce
Gregorian

Undated Materials

Students

Material is almost never undated. Meaning, you can almost always approximate a date. If you look at something and think it could be within a 50 + year span, then ask your supervisor for help. If the legacy finding aid is telling you that material isn't dated, or has no date, don't make a date entry at all and let your supervisor work on it. If the legacy data specifically says the material has no date on it, add a [Scope and Contents note](#) that says "Material is undated," or if the material has some dated and some undated material, "Also contains undated material."

Staff

Materials always need a date statement. If you're working with a legacy finding aid or a collection a student worked on that doesn't have a date statement (or the date statement is "undated") or if the date statement is incorrect or too broad, you must come up with a date statement. Work with other staff and/or your supervisor if you need help approximating the date of the materials.

Extents

File Level

Record file-level extent in terms of containers. Do not record the extent in terms of the material type or format unless the items don't fill a full container and there's not a subordinate container type (such as folders) to use instead. Select the Portion, Number and Type in ArchivesSpace. If you are describing material that has multiple types of containers, the Portion will be "Part" and you'll have to make multiple extent entries to describe each part. If it is contained in multiple of the same container or one container, the Portion is "Whole." The Number is the number of containers being described. The Type is a drop-down list of types of containers and formats. For file level description, this is most often going to be folders, oversize folders, or boxes. Refer to the [Container sizes spreadsheet](#) to find the extent type term to use for a given container. For digital files, whether digitized copies of audiovisual materials or born-digital files, record the number of digital files. Refer to the [Digital metadata spreadsheet](#) for information on which term to use. Nothing needs to

be recorded in Container Summary, Physical Details, or Dimensions, except for digital materials. For digitized audiovisual materials, record the extent in terms of number of files (e.g., audio files, video files, image files, etc.). Record the total duration of the combined files in a parallel statement of extent in the Container Summary field. Always record the duration in terms of hours, minutes, and seconds (as applicable to the materials), abbreviating the terms as "hr.," "min.," and "sec."

Extents	
Portion *	Whole
Number *	3
Type *	folders

Item Level

This is where things get really complicated. Ask your supervisor if you feel the need to guess on anything.

There are rare instances when "Part" would be chosen for item level description. When the item includes various formats (e.g., letter and envelope), or there are significant subunits of different types (e.g., volume with accompanying compact disc), a separate extent statement should be recorded for each material type. Each record should have a Portion field value of "Part." So "1 envelope" and "3 sheets" might be recorded in two separate extent entries as parts for one item.

Sheets

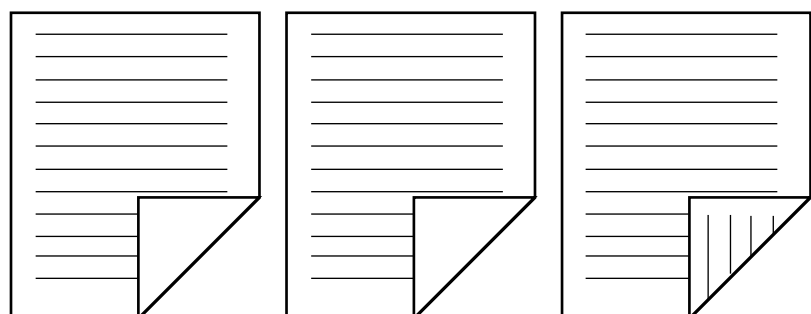
If the item is composed of unbound, loose sheets, record the extent in terms of sheets. If there is only writing on only one side of the sheet, record the extent as 1 sheet, regardless of whether it is formally numbered or not. If it is one sheet and written on both sides, you would record 1 sheet with (2 pages) in the Container Summary.

Portion *	Whole
Number *	1
Type *	sheet
Container Summary	
Physical Details	
Dimensions	13 x 23 cm

Portion *	Whole
Number *	1
Type *	sheet
Container Summary	(2 pages)

These same rules apply for multiple sheets in an item that is not bound: record the extent as a number of sheets and record a parallel statement in parentheses in the Container Summary field noting how many pages have writing. Therefore, for an item composed of 3 sheets with writing on both sides of only one sheet, describe it as 3 sheets with (4 pages) in the Container Summary. Record physical information on the base and applied materials of the item in the Physical Details field using terms from the [RDA Material Vocabulary](#), but only if unique (i.e., "paper, ink" is not

necessary). The presence of illustrative matter may also be recorded using terms from the [RDA Illustrative Content Vocabulary](#) (e.g., "illustrations"). The Dimensions of the item should be recorded in the form of height x width (according to the item's orientation) in centimeters, rounded to the next full centimeter.



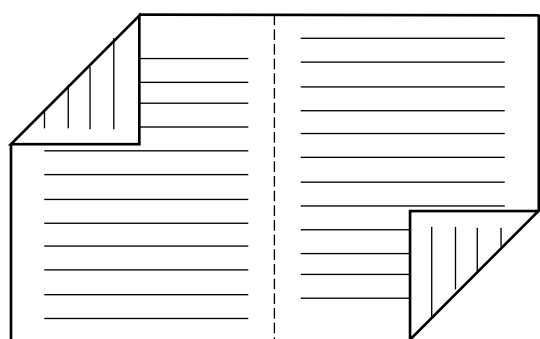
Portion *	Whole
Number *	3
Type *	Sheets
Container Summary	(4 pages)

For unbound sheets that used to be volumes, follow the bound [Volumes](#) directions below.

Folded Sheets

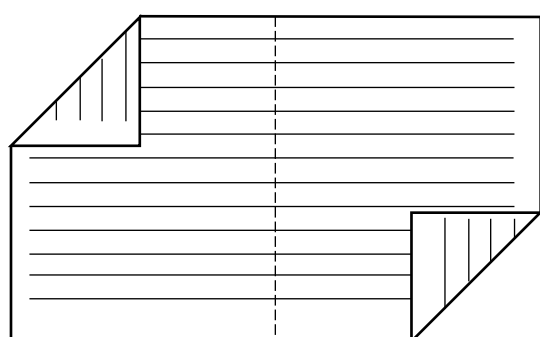
In cases where the sheet is folded to form pages, record the extent type as folded sheets, with a parallel statement of extent in the Container Summary field in terms of pages within parentheses.

These page counts should reflect how the creator wrote on the folded sheet. If they wrote on both of the outside pages and treated each side of the inside of the folded sheet as its own page (see example below), record the extent as 1 folded sheet and (4 pages).



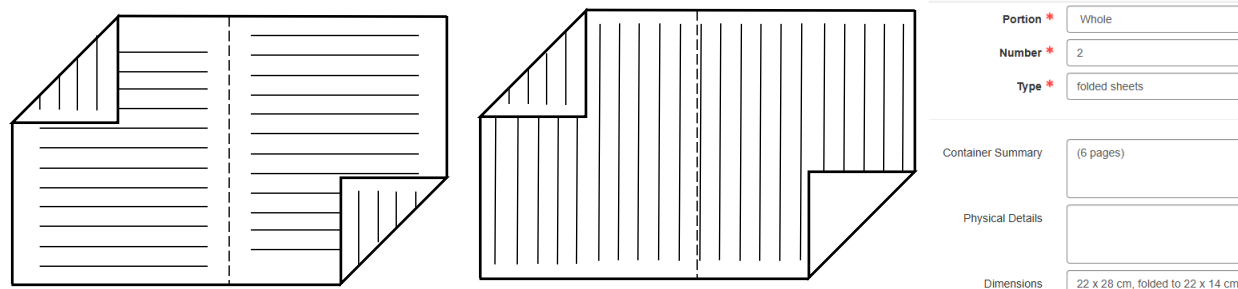
Portion *	Whole
Number *	1
Type *	folded sheet
Container Summary	(4 pages)
Physical Details	
Dimensions	22 x 28 cm, folded to 22 x 14 cm

If the creator wrote on both of the outside pages and treated the inside of the folded sheet as one page (see example below), record the extent as 1 folded sheet and (3 pages).



Portion *	Whole
Number *	1
Type *	folded sheet
Container Summary	(3 pages)
Physical Details	
Dimensions	22 x 28 cm, folded to 22 x 14 cm

For multiple folded sheets that comprise one item, count the total number of pages across all of the folded sheets and record them as one number in the Container Summary (see example below).

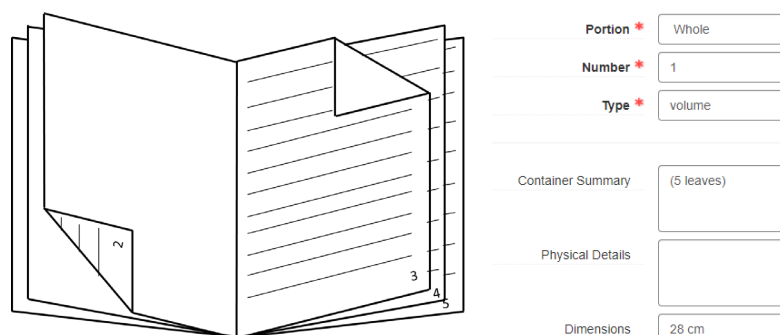


Record physical information on the base and applied materials of the item in the Physical Details field using terms from the [RDA Material Vocabulary](#), but only if unique (i.e., "paper, ink" is not necessary). The presence of illustrative matter may also be recorded using terms from the [RDA Illustrative Content Vocabulary](#) (e.g., "illustrations"). The Dimensions field should be recorded in the form of height x width (according to the item's orientation) in centimeters, rounded to the next full centimeter. For folded sheets, the dimensions of the sheet as well as its folded dimensions should be included, separated by a comma (i.e., "48 x 30 cm, folded to 24 x 15 cm").

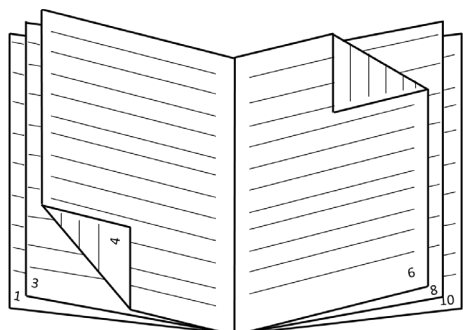
Volumes

If the item is composed of bound volume(s) (i.e., sheets bound or fastened together to form a single unit), record the extent in terms of volumes. Use judgement to determine whether a fastener is binding what is meant to be a volume or a cohesive work, such as a book, essay, or report, as opposed to a few letters or administrative documents. This doesn't just include traditional or professional binding, but also spiral binding and volumes housed in a three-ring binder. If the binding has been removed, whether as part of processing or prior to donation, make a general note indicating that, but still treat it as a volume for the extent.

If the volume includes content on one side of the page, record the sequence in terms of leaves in the Container Summary field within parentheses (e.g., 13 leaves).

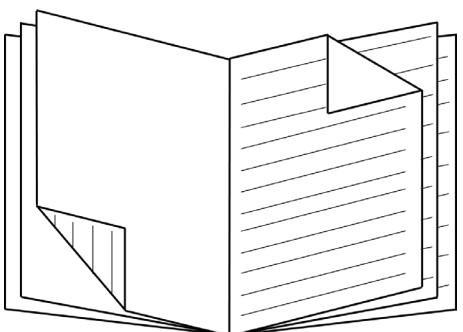


If there is content on both sides of the page, record the sequence in terms of pages in the Container Summary (i.e., 13 pages).

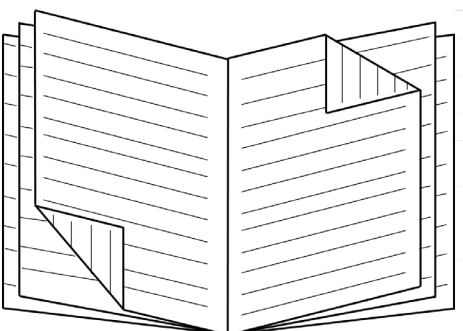


Portion *	Whole
Number *	1
Type *	volume
Container Summary	(10 pages)
Physical Details	
Dimensions	28 cm

If the volume does not include pagination, record (unnumbered leaves) or (unnumbered pages) in the Container Summary field, according to whether there is content on only one or both sides of each sheet. If the volume is really short, you can count the page numbers, but don't go to great lengths of counting, opting for (unnumbered leaves) or (unnumbered pages) instead. If the volume is unnumbered and a mix of pages and leaves, record (unnumbered pages).

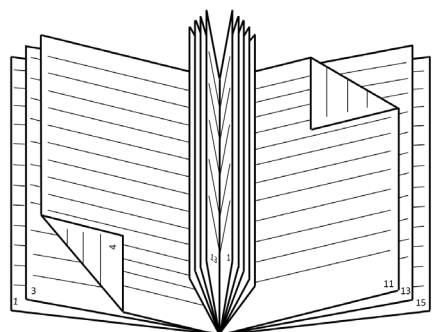


Portion *	Whole
Number *	1
Type *	volume
Container Summary	(unnumbered leaves)
Physical Details	
Dimensions	28 cm



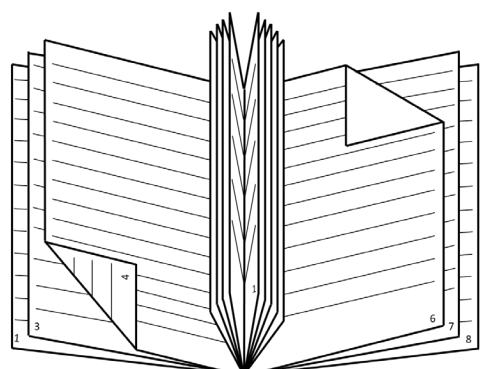
Portion *	Whole
Number *	1
Type *	volume
Container Summary	(unnumbered pages)
Physical Details	
Dimensions	28 cm

If there is more than one volume or two or more sets of pagination in one volume, the pages or leaves can be recorded separately with a comma (i.e., (237, 98 pages) or (237, 98 leaves)), or as one combined number (i.e., (335 pages)), or as (various pagings). If some sections are pages and some are leaves, record the values accordingly, i.e., (237 leaves, 98 pages). Record roman numerals as such and do not convert them to numbers (i.e., (iii pages)).



Portion *	Whole
Number *	1
Type *	volume
Container Summary	(13, 15 pages)
Physical Details	
Dimensions	28 cm

If there are numbered and unnumbered sequences of pages, the unnumbered sequences don't need to be accounted for unless they account for a significant portion of the volume. If the unnumbered pages are going to be accounted for, refer to them as unnumbered leaves or unnumbered pages, as appropriate. Alternatively, the unnumbered leaves or pages can be counted and recorded in square brackets, as in the following example.



Portion *	Whole
Number *	1
Type *	volume
Container Summary	(5 pages, [8] unnumbered pages, 8 leaves)
Physical Details	
Dimensions	28 cm

The Dimensions field should be recorded in the form of height (according to the item's orientation) in centimeters, rounded to the next full centimeter. If the volume is less than 10 cm in height, record the height in millimeters. Also, if the width is less than half the height, or it is greater than the height, record the dimensions in terms of height x width (i.e., 20 x 8 cm). If there are multiple volumes of different dimensions, record them together as a range of measurements like this: 24-28 cm, or 24-26 x 28-30 cm.

* Extents	
Portion *	Whole
Number *	4
Type *	volumes
Container Summary	(28, 137, 79, 99 pages)
Physical Details	
Dimensions	18-25 cm

* Extents	
Portion *	Whole
Number *	3
Type *	volumes
Container Summary	(201, 156, unnumbered pages)
Physical Details	
Dimensions	28 cm

Record physical information on the base and applied materials of the item in the Physical Details field using terms from the [RDA Material Vocabulary](#), but only if unique (i.e., "paper, ink" is not necessary). The presence of illustrative matter may also be recorded using terms from the [RDA Illustrative Content Vocabulary](#) (e.g., "illustrations").

Albums and Scrapbooks

For albums composed solely of photographs, record the extent in terms of albums. For scrapbooks—albums with mixed materials, including newspaper clippings, ephemera, artifacts, and/or photographs—record the extent in terms of scrapbooks.

Record the number of leaves or pages in the album or scrapbook in the Container Summary field. Follow the guidelines in the [Volumes section](#), above.

Record physical information on the base and applied materials of the item in the Physical Details field using terms from the [RDA Material Vocabulary](#), but only if unique (i.e., "paper, ink" is not necessary). The presence of illustrative matter may also be recorded using terms from the [RDA Illustrative Content Vocabulary](#) (e.g., "illustrations").

The Dimensions field should be recorded in the form of height (according to the item's orientation) in centimeters, rounded to the next full centimeter. If the volume is less than 10 cm in height, record the height in millimeters. Also, if the width is less than half the height, or it is greater than the height, record the dimensions in terms of height x width (i.e., 20 x 8 cm). If there are multiple volumes of different dimensions, record them together as a range of measurements like this: 24-28 cm, or 24-26 x 28-30 cm.

* Extents	
Portion *	Whole
Number *	1
Type *	album
Container Summary	(unnumbered pages)
Physical Details	black and white, photographs
Dimensions	17 x 25 cm

* Extents	
Portion *	Whole
Number *	1
Type *	scrapbook
Container Summary	(32 pages)
Physical Details	black and white, photographs
Dimensions	40 cm

For more specific information about processing photographic materials, refer to the [Photograph Processing Guide](#).

Still Images

If the item is a still image, record the pictorial area extent in terms of the image format (i.e., diagram, drawing, mock-up, painting, photograph, picture, postcard, poster, print, stereographic card, stereographic disc, study print, technical drawing, or wall chart). Record the color content of the image in the Physical Details field, selecting from the terms "color" or "black and white." If the image is a negative, also record the term "negative." Record the Dimensions of the pictorial area of the image in the form of height x width in centimeters, rounded to the next full centimeter. If there is additional information on the sheet, or the image is on less than half of a sheet, or on a sheet (or card) with a significant border, also record the dimensions of the sheet (e.g., "11 x 11 cm, on sheet 28 x 22 cm"). If the image is inside a folded cover, combine the dimensions (e.g., 14 x 9 cm, on sheet 28 x 36 cm folded to 28 x 18 cm). If the image is a different shape, note that after the dimensions (e.g., 9 x 4 cm oval). For slides, record the dimensions as the height x width of the slide. For negatives produced on film rolls, record the width of the film stock (i.e., "film width 35 mm").

For more specific information about processing photographic materials, refer to the [Photograph Processing Guide](#).

* Extents	
Portion *	Whole
Number *	1
Type *	postcard
Container Summary	
Physical Details	black and white
Dimensions	15 x 12 cm

* Extents	
Portion *	Whole
Number *	1
Type *	slide
Container Summary	
Physical Details	color
Dimensions	5 x 5 cm

* Extents	
Portion *	Whole
Number *	1
Type *	photograph
Container Summary	
Physical Details	black and white, cyanotype
Dimensions	21 x 26 cm

Extents	
Portion *	Whole
Number *	1
Type *	photograph
Container Summary	
Physical Details	black and white, silver gelatin
Dimensions	18 x 8 cm

Extents	
Portion *	Whole
Number *	1
Type *	photograph
Container Summary	
Physical Details	black and white, negative
Dimensions	4 x 7 cm

Sound Media

If the item is a piece of sound media, record the extent in terms of the media format (i.e., audiocassette(s), audiotape reel(s), audio disc(s) (for phonograph records)). The playing time of the media item should be recorded as a parallel statement of extent in the Container Summary field. Parallel statements of extent should be recorded within parentheses as "hr." "min." and "sec." separated by commas. Record the type of recording (i.e., analog or digital) in the Physical Details field. The playback characteristics should also be recorded (i.e., mono, quadrasonic, stereo, or surround), if important. For phonograph records, the rpm (i.e., 33.3 rpm) should also be recorded. The Dimensions recorded for sound media vary by format. For cartridges and cassettes, record the length x height of the face of the media in inches, then the width of the tape in inches. For discs, record the diameter (straight across) of the disc in inches. For reels, record the diameter of the reel in inches, then the width of the tape in inches. Record fractional dimensions as fractions, not as decimals.

Refer to the [AV Cheat Sheet](#) for a quick reference on the extent of various sound media formats.

Examples:

* Extents	
Portion *	Whole
Number *	1
Type *	audiotape reel
Container Summary	(13 min., 7 sec.)
Physical Details	analog, mono
Dimensions	6 in., 1/4 in. tape

Digitized sound media will also need an extent statement for the digital file. Refer to the section for [Born-digital and digitized media](#) (below) for guidance on these extent statements. If we are keeping the sound media carrier and the digitized file, both extent statements should be recorded, with the portion set to "Part." If we are discarding the sound media carriers (and preserving only the digitized files), there should only be an extent statement for the digitized file and the portion should be set to "Whole."

Video Media

If the item is a piece of video media, record the extent in terms of the media format (i.e., film reel, filmstrip, videocassette, videodisc (includes DVDs), or videotape reel) The playing time of the media item should be recorded as a parallel statement of extent in the Container Summary field. Parallel statements of extent should be recorded within parentheses as "hr." "min." and "sec." separated by commas (i.e., 1 hr., 1 min., 44 sec.). Record the type of recording (i.e., analog or digital) in the Physical Details field, if important. The color content of the item should also be recorded by selecting from the terms "black and white" or "color." If the image is a negative, also record the term "negative." The playback characteristics of sound content should also be recorded (i.e., mono, quadraphonic, stereo, or surround), if important. If there is no sound content, record "silent." The Dimensions recorded for video media vary by format. For cartridges or cassettes, record the gauge of the film in inches (except in the case of 8 mm film). For discs, record the diameter of the disc in inches. For filmstrips or rolls, record the gauge of the film in millimeters. For reels, record the diameter of the reel in inches, then the width of the tape or film in millimeters. For rolls, record the width of the film in millimeters. For all formats, descriptions of 8 mm film should also note if the gauge is single, standard, super, or Maurer. Record fractional dimensions as fractions, not as decimals.

Refer to the [AV Cheat Sheet](#) for a quick reference on the extent of various video media formats.

* Extents	
Portion *	Whole
Number *	1
Type *	film reel
Container Summary	(43 min., 54 sec.)
Physical Details	analog, color, mono
Dimensions	8 in., 8 mm single

Digitized video media will also need an extent statement for the digital file. Refer to the section for [Born-digital and digitized media](#) (below) for guidance on these extent statements. If we are keeping the video media carrier and the digitized file, both extent statements should be recorded, with the portion set to "Part." If we are discarding the video media carriers (and preserving only the digitized files), there should only be an extent statement for the digitized file and the portion should be set to "Whole."

Notated Music

If the item is notated music, record the extent as "score" (or "scores"). The number of volumes, or pages and leaves, should be recorded in a parallel statement of extent in the Container Summary field, following the rules in the section for unbound sheets or volumes, as applicable, above. Parallel statements of extent should be recorded within parentheses. If important, record physical information on the base and applied materials of the item in the Physical Details field using terms from the [RDA Material Vocabulary](#), but only if unique (i.e., "paper, ink" is not necessary). The presence of illustrative matter may also be recorded using terms from the [RDA Illustrative Content Vocabulary](#) (e.g., "illustrations"). The Dimensions recorded for notated music vary by format. If the item is on [unbound sheets](#), the dimensions should be recorded in the form of height x width in centimeters, rounded to the next full centimeter. For [folded sheets](#), the dimensions of the sheet as well as its folded dimensions should be included (e.g., "48 x 30 cm, folded to 24 x 15 cm"). If the item is a [bound volume](#), the dimensions should generally record only the height in centimeters, rounded to the next full centimeter. If the volume is less than 10 cm in height, record the height in millimeters. Also, if the width is less than half the height, or it is greater than the height, record the dimensions in terms of height x width.

Example:

- 1
score
(35 leaves)
28 cm

Maps

If the item is a cartographic resource, record the extent in terms of the cartographic format (e.g., drawing, map, model). For globes, use "object" or "objects" and follow the instructions for [Three-dimensional forms](#) (below). If the maps are part of an atlas, record the extent in terms of volumes and follow the guidelines for [Volumes](#) (above), and record that the item is an atlas in the genre/form terms and scope and content note. Record the color content of the image in the Physical Details field, selecting from the terms "black and white" or "color." The dimensions recorded for cartographic materials vary by format. For diagrams, maps, and two-dimensional models, the dimensions of the face of the map should be recorded in terms of height x width, like you would record the dimensions of a [still image](#). If it is difficult to measure the map face, record the dimensions of the sheet in terms of height x width (e.g., "sheet 22 x 28 cm"). For atlases, record the dimensions as you would for other [volumes](#), generally recording only the height in centimeters, rounded to the next full centimeter. If the volume is less than 10 cm in height, record the height in millimeters. Also, if the width is less than half the height, or it is greater than the height, record the dimensions in terms of height x width. For globes and three-dimensional models, follow the guidelines for [Three-dimensional forms](#) (below), generally recording dimensions in terms of height x width x depth, in centimeters. For globes, record the diameter in centimeters, noting that it is the diameter (e.g., "12 cm in diameter").

Examples:

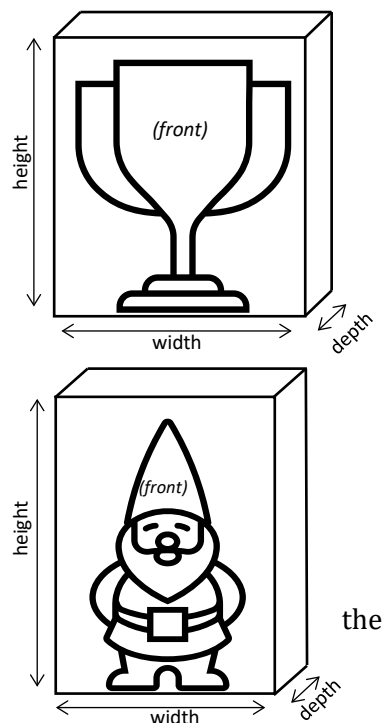
- 3
maps
color
25-32 x 46-48 cm
- 1
map
black and white
27 x 42 cm, on sheet 49 x 76 cm
- 1
volume
56 cm
Accompanying genre/form term: atlases
- 1
object
color
12 cm in diameter
Accompanying genre/form term: Globes
- 1
model
hardboard, paper, plastic
24 x 36 x 12 cm

Microform

If the item is a microform, record the extent in terms of the microform format (i.e., microfiche, microfilm reel). Record the color content of the image in the Physical Details field, selecting from the terms "black and white" or "color." If the image is a negative, also record the term "negative." The Dimensions recorded for microforms vary by format. For microfiche, record the height x width in centimeters. For reels, record the diameter of the reel itself (regardless of the amount of actual film on it) in centimeters, then the width of the film in millimeters.

Three-dimensional Form

If the item is a three-dimensional form, record the extent as "object." When necessary, the number and type of component parts may be recorded as a parallel statement of extent, in parentheses. Artifacts are rare at the item level and description will likely be enhanced by describing the base material, so record information on the base and applied materials of the item in the Physical Details field using terms from [RDA guidance for material of a manifestation](#) or the [RDA Material Vocabulary](#), (e.g., wood, metal, black enamel, paper). The Dimensions of the item should be recorded in terms of height x width x depth. If the item is in a case, the dimensions of the case may also be recorded in terms of height x width x depth (e.g., "9 x 3 x 3 cm, case 12 x 6 x 6 cm"). Record the instance for a stand-alone object as "Realia" for the type. If the object has been housed in an archival box (not just the original case), record "Box" or "oversize" (as applicable) for the top container. If the object (including an object in its original case) is being placed directly on shelf, record "Object" for the top container (i.e., Object 1).



Examples:

- 1
object
brass, wood
23 x 6 x 6 cm
- 1
object
(1 board, 8 pieces, 75 cards, 100 bills, 1 die)
cardboard, paper, plastic
6 x 41 x 27 cm

Computer Media

If the item is computer media, record the extent in terms of the media format (i.e., computer optical disc, computer disk, hard drive, USB flash drive, Zip drive, Zip disk, etc.) The Dimensions recorded for computer media vary by format. For cards, record the height x width in centimeters. For cartridges, record the length of the side of the cartridge that is inserted into the machine in centimeters. For cassettes, record the length x height in centimeters. and microfilm cassettes, record the width of the film in millimeters. For discs and disks, record the diameter of the disc in inches. For reels, record the diameter of the reel itself (regardless of the amount of actual film on it)

in centimeters, then the width of the film in millimeters. Record partial measurements in fractions, not decimals.

Additional format details that don't fit in any of these fields may also be recorded in a [Scope and Contents note](#).

Digital file(s) extracted from computer media will also need an extent statement. Refer to the section for [Born-digital and digitized media](#) (below) for guidance on these extent statements. If we are keeping the computer media carrier and the digitized file(s), both extent statements should be recorded, with the portion set to "Part." If we are discarding the computer media carriers (and preserving only the digitized files), there should only be an extent statement for the digitized file and the portion should be set to "Whole."

Born Digital and Digitized Media

For digital files, record the extent in terms of the number and type of digital files. Refer to the [Digital metadata spreadsheet](#) for information on which term to use. For image, text, data, presentation, and program files, the file size should be recorded as a parallel statement of extent in the Container Summary field (e.g., 663 MB, 1.4 GB, 1.2 TB). For audio and video files, the playing time should be recorded as a parallel statement of extent in the Container Summary field. Parallel statements of extent should be recorded as "hr." "min." and "sec." separated by commas (i.e., 1 hr., 1 min., 44 sec.). Parallel statements of extent should be recorded within parentheses. For audio files, record the playback characteristics (i.e., mono, quadrasonic, stereo, or surround), in the Physical Details field. For video files, record the color content of the item in the Physical Details field by selecting from the terms "black and white" or "color." If the image is a negative, also record the term "negative." The playback characteristics of sound content should also be recorded (i.e., mono, quadrasonic, stereo, or surround), if important. If there is no sound content, record "silent." For both audio and video files, this mirrors the information recorded in the Physical Details field, apart from recording the type of recording (i.e., analog or digital). For image files, record the color content of the item in the Physical Details field by selecting from the terms "black and white" or "color." For document files, the presence of illustrative matter may also be recorded using terms from the [RDA Illustrative Content Vocabulary](#) (e.g., "illustrations"). Do not record anything in the Dimensions field.

If there are multiple file types making up a single item, record a separate extent statement for each file type (e.g., 1 text file and 3 image files).

If we are discarding the carrier (whether sound, video, or computer), there should only be an extent statement for the digital file and the Portion should be set to "Whole" (unless there are multiple types of digital files, in which case the Portion should be set to "Part" for each). If we are keeping the carrier, a corresponding extent statement should also be recorded (refer to the [Sound media](#), [Video media](#), or [Computer media](#) sections, above), with the portion set to "Part." Only record dimension for carriers that are being retained.

Examples:

- 1
video file
(16 min., 3 sec.)
color, mono

- 1
text file
(3 GB)
- 1
audio file
(52 min., 18 sec.)
stereo

Other

For other item formats, consult with the Technical Services Archivist for instructions. Additional format details may also be recorded in a [General note](#).

Agent Links

No need to add agent links—either creators or subjects—at the file and item level. Agents are sparingly used for oral histories. However, if you see them there and have not been instructed to delete them, leave them there.

Subjects

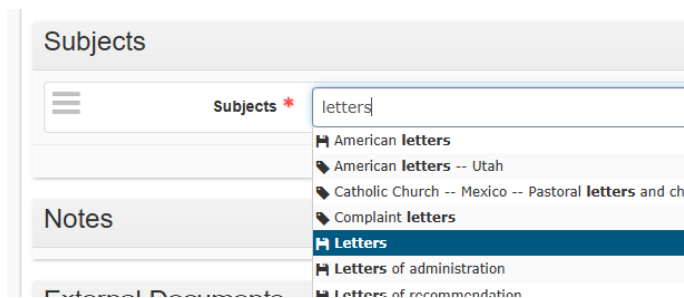
If you are doing file and item level description, genre headings must be added, unless the collection, series, subseries, etc. level you are working within contains all the same genre, and that heading has been added at the level above. But in order to inherit the genre/form terms of the level above, the file or item needs to have the exact same terms as the level above. For example, if a subseries has "letters," "postcards," and "photocopies" linked as genre/form headings and a file under that subseries is comprised only of letters, you will need to link "letters" at the file level, since the file doesn't include letters, postcards, AND photocopies.

A form heading describes what something IS, not what it is about. It means format or purpose, such as a letter or financial records. 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.

For file level description, 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 printed ephemera). For item level description, you will add the genre heading that reflects that item.

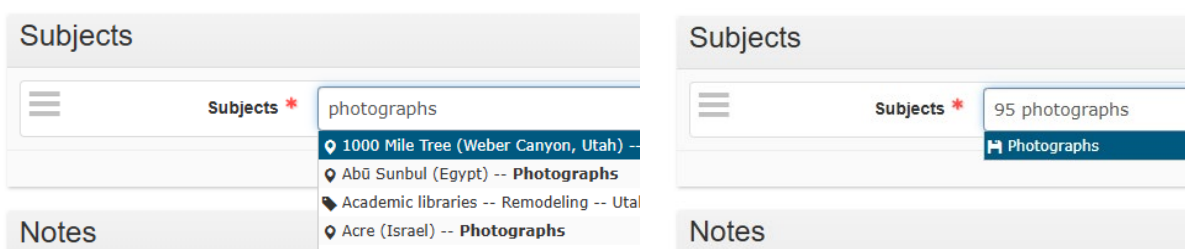
When audiovisual materials have been digitized, be sure to include genre/form terms reflecting the digital files. Reference the [Digital metadata spreadsheet](#) for information on which term(s) to use. For components with retained carriers, include a term(s) for both the carrier and the digital file(s).

Start typing in what you think might be the correct term and see if it can be easily selected from the drop-down menu:

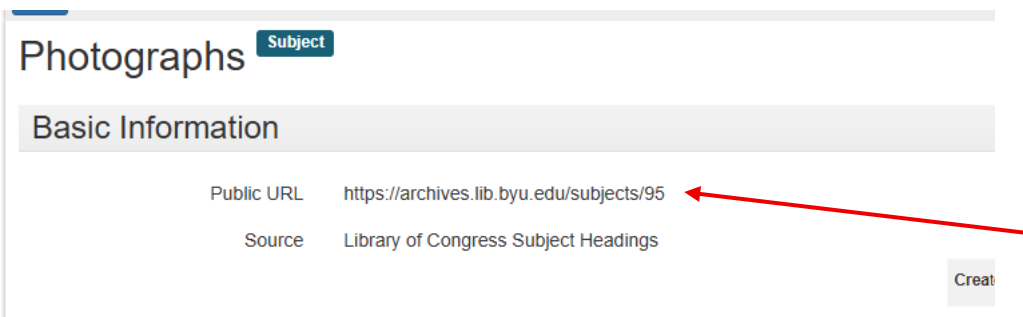


Genre/form terms can be differentiated from other subject types by the icons on the left—genre/form terms have the floppy disk-shaped icon.

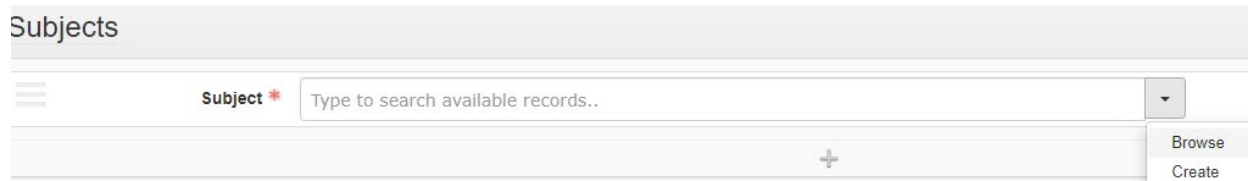
If the term you're looking for doesn't come up in the drop-down menu, you can try adding the ArchivesSpace code for that subject at the beginning of the term.



This code can be found by looking at the record for the subject term. The code is the number at the end of the Public URL. Some popular terms and their codes have been compiled in a list of [Common genre headings](#).



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."



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

Term Type (First)

- Topical 49
- Genre / Form 11
- Geographic 8

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

« 1 2 »

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

Subjects *

- Photocopies
- Letters

Genre headings that do not comprise 20% of the file or item can be mentioned in a scope note if the processor thinks providing a longer list of formats provides more helpful representation of the contents.

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 a genre needs to be added to the ArchiveSpace heading list, let your supervisor know. The processor should utilize the [Library of Congress Genre Form database](#), or the [ClassWeb system](#) to research new subject headings. The [Art & Architecture Thesaurus](#) can be utilized for genre/form terms not found in LCGF.

Common Genre Headings

Some commonly used genre/form headings for file- and item-level description. For terms with parentheticals, skip the parentheses when searching for the term (e.g., for "Research (Documents)," type "research documents" in the search box). The ArchivesSpace code is included in square brackets. The full list of genre/form terms and their codes can be seen in the [ASpace genreform terms spreadsheet](#) used for spreadsheet uploads.

- "Agendas" [1067]
- "Articles" for articles from journals or unspecified sources [137]
- "Audiocassettes" [218]
- "Carbon copies" [17899] and "Photocopies" [651] for common reproductions
- "Clippings (books, newspapers, etc.)" for pieces of newspapers, magazines, etc. [96]
- "Compact discs" [1074]
- "Financial records" [1032]
- "Legal instruments" used for legal documents [320]
- "Letters" for handwritten correspondence [94]
- "Lists" [1034]
- "Manuscripts" [98]
- "Minutes (records)" [215]
- "Motion pictures" for film [6377]
- "Negatives" [702]
- "Notebooks" [286]
- "Notes" [103]
- "Photographs" [95]
- "Portraits" [736]
- "Postcards" [422]
- "Receipts (Financial records)" [17906]
- "Reports" [136]
- "Research (Documents)" [1070]
- "Slides (Photography)" [657]
- "Transcriptions (Documents)" for less formal written copies of oral or written language, either in longhand or on a machine. For more formal copying, use "transcripts." [17923]
- "Transcriptions (Music)" for transcribed copies of music. [16692]
- "Transcripts" for formal, extremely accurate written, printed, or typed copies of an original text or words originally spoken. For less formal copying, use "transcriptions (documents)." [669]
- "Videocassettes" [163]

Notes

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

file or item includes information applicable to every item and file below it, you do not need to repeat notes.

Notes do not need labels, so leave that field blank.

The following notes are the most likely to be utilized at the file and item levels.

Style Guidelines

Notes follow Turabian style guidelines:

- 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"). You may use a hyphen to represent date ranges if those prepositions have not been used (e.g., "Materials dated 1985-1986.")
- *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
- 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)
- Use quotations around titles. 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](#).

All references to the Church should be compliant with the current version of the Church's style guide. Notable elements of this style are provided below:

- In the first reference in notes, the full name of the Church should be used: "The Church of Jesus Christ of Latter-day Saints"
- Following references within the same note may use the shortened form of "the Church"
- Notes may use the term "Mormon" as an adjective as necessary, or when referring to proper nouns (such as Mormon Trail) but should not refer to members of the Church as "Mormons"
- Splinter groups practicing polygamy should be referred to by the name of their church, and should not be referred to as "Mormons"

Conditions Governing Access

Record a Conditions Governing Access note if there are different restrictions governing the file or item than the subseries, series, or collection immediately above. If the same restrictions apply, the file or item can inherit the note from the level above.

If restrictions are present, 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 be Reference Services (specialcollections@byu.edu).

If the materials have restriction dates, the beginning and end dates of the restriction period should be recorded in ISO 8601 format. A year is not sufficient, it must be a complete date, otherwise ArchivesSpace will not save it. The type of restriction (e.g., donor/university imposed, repository imposed, or fragile) should also be selected from the option list. Restrictions must have beginning and end dates, and curators must provide the end date for restriction (or a restriction period, which the processor can use to calculate the restriction end date from the date of materials). The exceptions to this are materials that are restricted because the materials are fragile or because they're stored in the cold storage or freezer. Materials that are simply stored in the vault due to their high value aren't restricted.

Examples:

- Donor restricted until 2015. Permission to use materials must be obtained from Reference Services at specialcollections@byu.edu.
Restriction begin: 1998-01-01
Restriction end: 2015-01-01
Restriction type: 1 – Donor/university imposed access restriction
- 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.
Restriction begin: 2011-01-01
Restriction end: 2036-01-01
Restriction type: 1 – Donor/university imposed access restrictions

On rare occasions, and only as specified by the curator, some materials will be restricted permanently. A reason for the restriction can be stated if the curator has requested this information be published.

Examples:

- Restricted permanently.
Restriction begin: [leave blank]
Restriction end: [leave blank]
Restriction type: 2 – Repository imposed access restriction
Conditions Governing Access note for an item that is permanently restricted. The item record is unpublished, so patrons aren't aware the item exists.
- Restricted. Requests to access restricted materials in the L. Tom Perry Special Collections should be submitted to Reference Services at specialcollections@byu.edu.
Restriction begin: [leave blank]
Restriction end: [leave blank]
Restriction type: 2 – Repository imposed access restriction
Conditions Governing Access note for an item that is permanently restricted. The item record is published, so patrons are aware of the item's existence and there is a method for patrons to request access to the item.

In some cases where the curator doesn't want the restriction reason published for the patron to see, it may be helpful for Reference Services to know details about why materials are restricted. For instance, if materials are restricted for the presence of social security numbers, they may be able to ask the curator to redact the materials and then provide the patron access to the redacted copy. In this case, and at the request of the curator, an additional unpublished internal access note can be recorded.

Example:

- Restricted. Requests to access restricted materials in the L. Tom Perry Special Collections should be submitted to Reference Services at specialcollections@byu.edu .
Restriction begin: 2008-01-01
Restriction end: 2042-01-01
Restriction type: 1 – Donor/university imposed access restriction
Published? Yes
-and-
INTERNAL NOTE: Restricted for social security numbers.
Restriction begin: 2008-01-01
Restriction end: 2042-01-01
Restriction type: 1 – Donor/university imposed access restriction
Published? No

For photographs and negatives, the Conditions Governing Access Note is used to indicate a delayed access to the materials due to their cold storage. Since it still allows for access after a waiting period, dates are not required for this version of the note. See the [Photograph Processing Guide](#) for more information on the access notes for photo materials.

- Open for public research. Items kept in cold storage; access requires 24 hours advance notice.
Restriction begin: [leave blank]
Restriction end: [leave blank]
Restriction type: 3 – Restricted fragile

For audiovisual recordings or digital files that have been digitized, the Conditions Governing Access Note is used to point out the limited or unique/extra access to these materials. For further guidance and examples of Access notes, refer to the [Collection-level Description](#) training document.

- Open for public research. Digitized audiovisual recordings available for use through Reference Services.
Restriction begin: [leave blank]
Restriction end: [leave blank]
Restriction type: [do not select any]

For materials that have been digitized and where the digital copy is available online, the Conditions Governing Access Note is used to point out the extra access to these materials.

- Open for public research. Item is digitized. Links available in finding aid.
Restriction begin: [leave blank]
Restriction end: [leave blank]
Restriction type: [do not select any]
- Original condition restricted. Digitized copies are for patron use. Links available in finding aid.
Restriction begin: [leave blank]
Restriction end: [leave blank]
Restriction type: 3 – Restricted fragile

Files and items may have multiple restrictions if the materials are stored across multiple locations (regular stacks, cold storage, freezer), if only some materials are fragile or otherwise condition-restricted, and/or if different materials have different donor- or repository-imposed restriction periods. When there are multiple restriction statements that apply to the materials being described, the statements should be combined in one note, with each statement on its own line. Each line should include a label specifying what types of materials are restricted (e.g., photographs, negatives, slides, letters) and the top container(s) where those materials are stored followed by a colon and then the restriction statement. As applicable, these notes can be followed with, on another line, "All other materials are open for public research."

Examples:

- Photograph in Box 1: Open for public research. Items kept in cold storage; access requires 24 hours advance notice.
Negative in Box 17: Open for public research. Items kept in cold storage; access requires 72 hours advance notice.
Restriction begin: [leave blank]
Restriction end: [leave blank]
Restriction type: 3 – Restricted fragile
Conditions Governing Access note for an item composed of a corresponding photograph and negative.
- Photographs in Box 4: Open for public research. Items kept in cold storage; access requires 24 hours advance notice.
All other materials open for public research.
Restriction begin: [leave blank]

Restriction end: [leave blank]

Restriction type: 3 – Restricted fragile

Conditions Governing Access note for a file where the photographs have been separated for cold storage.

- Photograph in Box 1: Open for public research.
Glass plate negative in Box 6: Condition restricted. Contact Reference Services at specialcollections@byu.edu.
Restriction begin: [leave blank]
Restriction end: [leave blank]
Restriction type: 3 – Restricted fragile
Conditions Governing Access note for an item composed of a glass plate negative and a corresponding photograph, where the photograph is a modern print created by Special Collections and therefore doesn't need to be stored in cold storage. Refer to the [Photograph Processing Guide](#) for more information on storage conditions of photographic materials.

At the item level, this may happen most often if a corresponding photographic print and negative are being described as one item and are stored in different locations. However, if the collection, series, subseries, or file above the item has the same restrictions, just for a wider range of top containers, the Access note can inherit. For example, if you are working on an item composed of a photograph (in Box 1) and a corresponding negative (in Box 5), and the series above the item has the following access note, the item can inherit the Access note:

- Photographs in Boxes 1-4: Open for public research. Items kept in cold storage; access requires 24 hours advance notice.
Negatives in Boxes 5-6: Open for public research. Items kept in cold storage; access requires 72 hours advance notice.

If a file has been arranged and described below the file level and any (or all) of those subdivisions have different access restrictions than the file, an access note will need to be added to each file or item.

Always check the [Restrictions Apply? box](#) if you are adding a Conditions Governing Access Note (unless the note is "Open for public research."). Also check the Restrictions Apply? box at every level above a restricted file or item.

Flagged Materials in University Archives (Staff Only)

Materials in University Archives collections that have been flagged for restriction by Records Analytics must have a Conditions Governing Access note. This note will specify when the restriction period ends and the reason for restriction. Do not publish the note. Refer to the [University Archives Processing Workflow](#), [University Archives Flag Processing Workflow](#), and [Flag Processing example](#) documents for more information.

Existence and Location of Copies

Record the location of copies or other reproductions of manuscript materials (e.g., transcriptions, microfilm, digital copies, etc.), if requested in the processing plan.

Copies held by another repository should be recorded with the name of the collection (or portion of the collection), the name of the holding repository or individual, and their address or link (if available).

- Transcript of diary available in the Americana Collection.
If the analog copy is available in other BYU Library collections.

If you have copies of materials, such as photocopies, transcriptions, digital scans, etc. in the same collection, their presence should be noted in an Existence and Location of Copies note, and NOT as their own separate file or item. 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 or applicable level above, and not within an inventory. Alternatively, instances for copies can be linked to the same file or item record. This decision for where to link copies of materials depends on the context of the materials, how they're being described, and how they're housed. Talk to your supervisor if you need more guidance.

Examples:

- Typescript of journal located in Box 5, folders 2-3.
- Photocopies of photograph located in Folder 6.

If the collection is being digitized, the curator may request that the copy also be digitized. In this case, do not include an Existence and Location of Copies note and include the item in an appropriate inventory. If the titles of the corresponding items don't indicate that one is the original and the other is a copy, this may be indicated in the scope and contents notes.

Existence and Location of Originals

Every once in a while, you will use this note if the item being described has an original located elsewhere, usually at another institution. Record the location of original materials, if the materials being described are reproductions (e.g., photocopies, digital scans, microfilm) and the note is requested in the processing plan. Notes should state the name of the collection (or portion of the collection), the name of the holding repository or individual, and the address or link of the holding repository or individual (if available). This note is optional and should only be recorded if requested in the processing plan.

An example of an existence of originals note:

- Original letterpress copybooks: Church History Library; 15 East North Temple Street; Salt Lake City, Utah 84150.

Scope and Contents

The Scope and Contents note is optional at the file and item level. The note is used when there is context to be included about the item, including dates (or lack of dates), page numbers, location of publication or letter origin, authors of materials, recipients of letters, subjects of materials, format of materials, processes that contributed to the materials' creation, and any other helpful context, such as gaps in the material's contents or narrative about alternative titles. This note can be used when you feel the need to restate the entire description in order for the patron to fully understand what the object is and which the title parameters did not allow you to do.

DACS outlines scope notes in [six bullets](#). We require collection and series notes to contain all six of these bullets (if applicable), but scope notes at the item and file level are allowed to include only aspects of these requirements. Genre headings that do not comprise 20% of the file or item and are not represented in the genre headings can be mentioned in a scope note if the processor thinks providing a longer list of formats provides more helpful representation of the contents.

Sometimes, legacy finding aids will have extra information in inventories for which you need to cut and paste to leave a title and remove the extra information to a Scope and Contents Note. For example: "The Land Beyond the Kuttawoo: The Madison Story, 1974. Dramatic production on the history of Madison, Connecticut," should have the formal title in the title field, the date in its field, and the information about the production cut and pasted into a Scope and Contents note. If the extra information you are cutting and pasting in needs some editing (such as spelling out abbreviations of months, etc.) please edit it. Do not record transcriptions of notes from the item itself in this field, as these types of specific statements are coded in a separate MARC field, and therefore go in General Notes.

For digitized audiovisual material, add a Scope and Content note, if applicable, detailing any relevant information from the Manuscript Digital Access (MDA) regarding the state of recordings such as abrupt endings or starts, static, distortions, or playback channel changes.

Examples of Scope and Content notes:

- Photocopy of handwritten narrative titled "Descriptive," dated between 1898 through 1908. The narrative describes the campus of Old Fort Cameron, in Beaver, Utah, including building functions, locations, and surrounding landscaping. The narrative is similar but not identical to the "History and Location" sections found in the Beaver Branch annuals. A handwritten note on the document states that the author is unknown, but it may have been written by Ernest Partridge, first principal of the Beaver Branch.
- Three drafts, one incomplete.
- Recording ends abruptly.
- Title is: Inglewood Ward program [this is a formal title found on the item]
Scope and Contents Note: Recording of members of the Inglewood Ward (likely California) expressing gratitude and greetings to Earl (likely Earl Swingle who died of cancer in 1957).
- 3 items, 5 pages. (If the materials are contained in a folder, the folder goes in the extent and any further info about the extent of the items inside goes in a Scope and Contents note).
- Also contains undated material.
- Spiral-bound copy with appendices.
- Article is about Salem landmarks.
- Signed "A.J.A.R."
- Ends abruptly. Static throughout.
- 1 original, 2 photocopies, and 1 transcript.
- 2 copies.

Language of Materials

If "Multiple Languages" has been entered in the [Language](#) field drop-downs (accompanied by drop-downs for the specific languages), you must record a Language of Materials note. Information about additional languages should only be recorded if there is significant representation in the materials being described. Notes will generally follow the format of:

- Materials in [language] and [language].

The punctuation and style for Language of Materials Notes should follow the [Turabian style guide](#).

Examples of language notes include:

- Materials are in English and Spanish.
- Materials in English with some correspondence in Welsh, with a translation in English.

General

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

Sometimes, extra information needs to be split in separate general notes because of the way it gets cataloged later.

In many legacy finding aids, it's stated whether something is holograph or typescript, typescript photocopy, holograph photocopy, typescript carbon copy, etc. These need to be stated in separated general notes in this format: Typescript; Holograph; Typescript (carbon copy); Holograph (photocopy) etc. If there is no statement of typescript or holograph, then do NOT go out of your way to identify this. If there is no statement of typescript or holograph, you do not state that it is a photocopy in the general note, you leave that to the genre heading you will be adding regardless to reflect its photocopy (or mimeograph copy, carbon copy, etc.) format.

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 a single sheet, such as a broadside, or poster, use the phrase "Title from recto." If it is from the back, say "Title from verso." If it is a bound volume and has a cover from which the title is taken, use the phrase, "Title from cover"; "Title from spine" could also be used. Otherwise, state the location the title was taken from, i.e., "Title from second page." "Title from original inventory." "Title from folder." "Title from label." "Title from inventory." "Title from folder." If there is no obvious title page, as often occurs with promotional material, use the phrase, "Title from big text." If you are changing a formal title but an original title exists in an inventory, folder, or other location, state: "Alternative title from inventory: [insert original title]."

Audiovisual items, objects, and other non-textual items should not employ the phrases "recto" or "verso" because these terms refer to textual items and do not provide enough information as to the location of the formal title.

The General Note is also used to record captions and other information written on items. Use the same description rules as the titles above to indicate where the information came from, i.e., "Note on verso: Officers quarters, faculty row." If a caption or other information written on the item is illegible or missing, you can write what you can see and use [...] to indicate the illegible portion. Then add a SECOND general note to indicate why that caption was illegible.

See [Reparative Language](#) for more information on how this note is used to state presence of harmful, offensive, or outdated language.

For digitized audiovisual materials and born-digital files whose carriers will *not* be retained, add a general note describing the source of the digital content. Use the following template to compose this note:

- Digital content sourced from: [# of carriers] [extent term] ; [dimensions of carrier], [AV type, if applicable].

There should always be a space on either side of the semicolon (;). The statement is a narrative and should therefore always end with a period. If there are multiple of the same carrier and their dimensions vary, record their dimensions as a range, similar to a file with sheets of varying sizes. Reference the [AV Cheat Sheet](#) and/or the [Electronic Media Guide](#) for detailed information on carriers and which terms to use in this statement. These references are also helpful for determining the AV type for instances or reading the AV Format code from the MDA.

If there are multiple AV items within a file, list the numbers in a General note, separated by a comma.

General notes do not currently inherit to lower levels.

Examples of General notes:

- Annotation on verso in unknown hand: "Women's Congress at Vienna. Lady Tata will represent the National Council of Women of India."
Inscription note
- See Series 5 Subseries 3 Item 2 for more information on this publication.
- Helen Foster Snow with Ts[...] at Tiananmen Square.
Inscription note
- Handwriting illegible.
- Title from cover.
Title source note
- Title from first page.
Title source note
- Alternative title from inventory: Financial letters.
Alternative title note
- Finding aid contains descriptive language provided by the creator that may be harmful and/or outdated. This includes original titles. Materials may contain harmful language or depictions reflecting biases of creator and/or the time period.
Reparative language note
- Digital content sourced from: 1 video cassette ; 1/2 in. VHS.
Digital source note
- Digital content sourced from: 5 audio discs ; 12 in. 33.3 rpm record.
Digital source note
- Digital content sourced from: 1 audiotape reel ; 1/4 in. tape.
Digital source note

- Digital content sourced from: 1 audio disc ; 5 in. compact disc.
Digital source note
- Digital content sourced from: 2 film reels ; 3-4 in., 16 mm. tape.
Digital source note
- U-matic.
Video format note
- NTSC.
Broadcast standard note

Title source notes and Digital source notes are required General notes if they're applicable to the materials being described. For all other General note types, use your best judgment to decide what should be included as a General note.

Biographical/Historical

Biographical and administrative histories are not generally attached to file and item records because there aren't usually agents listed as "Creators" at the file or item level. If there is an agent linked as a Creator at the file or item level (usually in the case of oral histories or to preserve significant legacy metadata), include a biographical or administrative history note. For instructions on writing biographical and administrative histories, refer to the [Biographical /Historical Notes and Agent Records](#) document.

Instances

If there are already containers attached to a record (for instance, at another file or item or to a separate series or subseries), add the container number by selecting the Type and then the Top Container. Select the Type "Text" for written/typed materials (including books) inside a box, "Graphic Materials" for photographs or other visual materials, "Audio" and "Moving Images" for audiovisual materials, "Computer Disks" for computer media, "Books" for stand-alone volumes not in a box, "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 web form titled "Instances". It has two main input fields. The first field is labeled "Type" with a red asterisk and contains the text "Text". The second field is labeled "Top Container" with a red asterisk and contains a blue dropdown menu. The dropdown menu is open, showing "Box 1: [31197231044469]" as the selected option. There is a small "x" icon and a dropdown arrow on the right side of the menu.

If you need to add a Top Container that is not already 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, which is selected from a drop-down menu (i.e., box, carton, etc.), and the Indicator, which will be the container number. Top container numbers should be unique throughout a collection—numbering shouldn't restart for different container types. If there's confusion about what term to use for "Container type," refer to the [Container sizes spreadsheet](#) to find the correct term for the top container being described.

Create Top Container

After linking/creating the top container, add a Child Type (if the materials being described make up only part of the top container) from the drop-down menu, and the Child Indicator, such as Folder and 1. A range of Child Indicators may be included (e.g., Folder; 4-9). Child Indicator numbering restarts at 1 in each top container.

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

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

If you are using an [Existence and Location of Copies note](#) to state the location of a copy of something, including microfilm, instances for that box or folder where the copy is stored can be attached with that file or item or at a higher level, depending on the context.

If a file or item comprises physical materials stored on shelves, and if there is not a narrower level of description, the file or item must have at least one instance linked. If the file or item is comprised solely of digital materials, the digital object instances will be created and linked to the finding aid after digitization by the Digital Metadata Librarian.

Description Scenarios

- Cased images

Physical Processing

Refer to the [Housing](#) and physical processing document for information on physically arranging and housing materials and for information on housing specific material types.