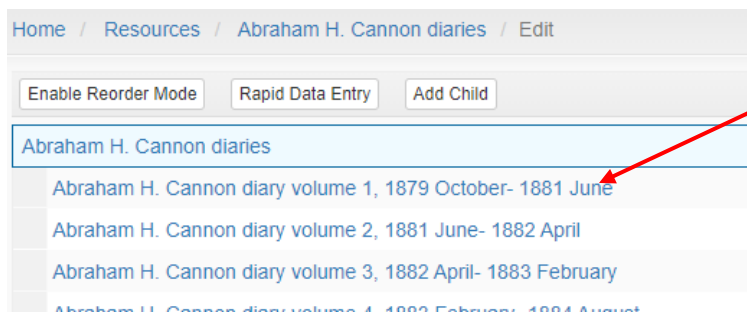
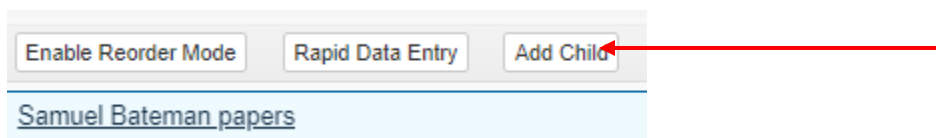


Archival object:

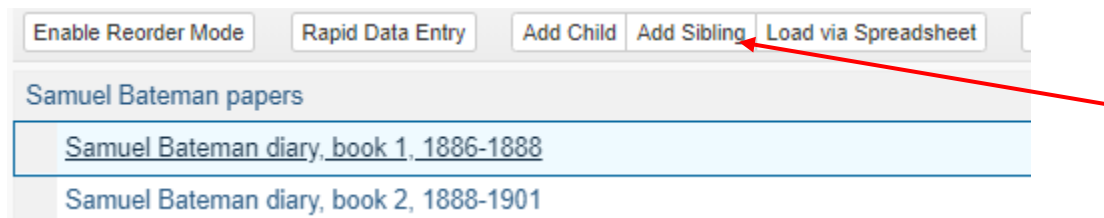
ArchivesSpace refers to the lines created in inventories as archival objects, so that is how they will be referred to from here on out.



Add an entry title by clicking “Add child” if you are the collection level:



Or “Add sibling” if you are working from within an existing inventory:



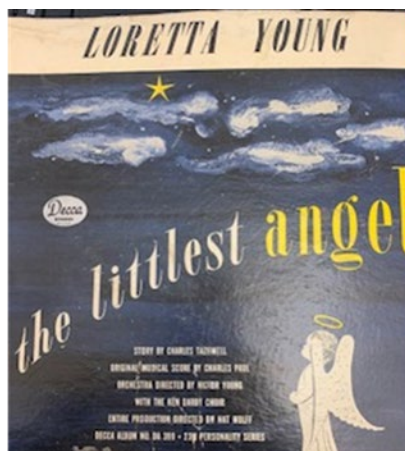
Titles:

Formal titles: Collection materials have formal titles on their title page, label, etc. In legacy finding aids, these titles are often set apart with capitalization, italics or quotes. Note where the title came from (if you know) in a **General Note**. (See the General Note section for directions on this). 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]

Example:

“Hearts and Flowers” by Helen Foster Snow

Should be: Hearts and flowers / by Helen Foster Snow



The littlest angel / Loretta Young.

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.

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.

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 (i.e. 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."

Devised titles: If there is no formal title on an item, you need to devise a title using the following pattern: [Creator] [format] [topic]. Often, the topic portion isn't needed or known. Sometimes the creator isn't known and therefore shouldn't be included or guessed. The format may need to be an aggregate term if there are more than three types of materials being listed in the description. We use "papers," "records," or "collection" as appropriate.

Similar to formal titles, follow the [Title Style Cheat Sheet](#) for guidelines on capitalization and punctuation.

Title examples:

James Stewart papers

Department of Art records

Collection on A. O. Smoot

Nibley family papers

Edgar Snow photograph of soldiers

Arnold Friberg paintings for Pride and prejudice

The creator's name in titles should be formatted as the preferred name used in the Library of Congress database (look up "Name Authority Heading" searching by last name first here: <https://authorities.loc.gov/webvoy.htm>) or if it's not in the database, whatever the most commonly used version of the name is in the materials. 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.

Correspondence: We follow this structure to make sure correspondence is described consistently: [sender], [location], letter to [recipient], [location]. If you don't have a piece of that information, leave out that portion and follow the rest of the template. 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, Provo, Utah, letter to Angus M. Cannon, Salt Lake City, Utah

Karl G. Maeser letter to Angus M. Cannon (no locations)

Karl G. Maeser letter (no recipient determined)

Karl G. Maeser letter to friend

Letter to Angus M. Cannon (no sender determined)

If you have multiple letters going back and forth between multiple recipients, just say "letters" and do your best to describe the letters as a whole. A check of the physical materials may yield better titles later.

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 directions)

Processor/creator-assigned titles: 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. A general note should indicate where the title came from. It is possible that you may standardize a devised title from a legacy finding aid only to have to fix it when you physically review a collection and the curator asks to have the original folder titles preserved instead, or the physical materials do not match that original inventory.

Component unique identifier: Series and subseries are simply numbered in order using this field. For items and files, this field will contain a unique number for that archival object 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. These two objects listed first under a subseries would both have a unique identifier of 1, since one is a file and the other is an item:

Songs and poems about shoreline towns in Connecticut, 1994-1995	File
The founders of Saybrook Colony and their descendants : 1635-1985, 1985	Item

See **Level of Description** below for determining whether the archival object is a file or an item.

Component unique identifier exceptions: Photographs in a collection are numbered straight through every level of description, 1 to 10,000 etc. to make it easier to tie them back to negatives. Also, 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, 1952-J, etc.)

Level of description:

Below the collection, series and sub-series levels, you are choosing either file or item level description for each archival object:

Level of Description *	
Language	Class
Publish?	Collection
Restrictions Apply?	File
	Fonds
	Item
	Other Level

File-level:

File-level is referring to an organizational structure and has nothing to do with a folder. File-level means the archival object is encompassing different pieces of information i.e. collective description. 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, so if 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
--	------

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, or 1 artifact. Often, item-level description 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 something is stored in a folder with a photocopy or other type of reproduction of that item, code it as an item, as the description is still referring to a singular intellectual unit.

Language:

If an archival object 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 you’re editing this drop-down to say “Multiple languages,” a **Language of Materials note** will also need to be added. Sadly, if a Language of Materials note and

Language drop-down selection at the level indicate multiple languages are in that series, subseries, etc. *every single* item and file will need a drop-down selection to specify which language they are.

Language	
Publish?	Afar
Restrictions Apply?	Abkhazian
	Achinese

The note format looks like this: Materials in <language langcode="language code">language</language> and <language langcode="language code">language</language>. Language codes can be looked up here: https://www.loc.gov/marc/languages/language_name.html

Notes Ad

Single Part Note

Persistent ID: a36a02a15a590c2cd6c9dc45f39763af

Label:

Type *: Language of Materials

Publish?

Content *

```
Materials are in <language langcode="eng">English</language>, <language langcode="ger">German</language>, and <language langcode="fre">French</language>.
```

Restrictions apply?

This box should be checked if there are any restrictions for the archival object that is different than what was selected at a level above it. In other words, if the whole collection or series is restricted, that is addressed at that level instead. During migration, the legacy finding may state that the item or file is restricted, or you may think it should be restricted as the processor. Ask your supervisor if you think it should be restricted. (Examples of restrictions: Material contains social security numbers, medical information, college transcripts, etc.) If this is checked, details about access restrictions should be recorded in a **Conditions Governing Access note**. See that section for more directions.

Restrictions Apply? ←

Dates:

The date label in ArchiveSpace is usually selected as "Creation." Every once in awhile, we may use "Record Keeping" to specify a photocopied date, but it's a case-by-case basis. We follow DACS for dates, so the date expression should go from general to specific (i.e. 1948 October 13). If the dates are a span of years, you don't record months or days in that span (i.e. 1948 October 13-1950 December 3 is wrong, it is simply 1948-1950). If the date is a span of months or days inside of a specific year, you do record

those (i.e. 1948 October-November or 1990 September 1-15). This date expression in ArchivesSpace is the free form field:

The screenshot shows the 'Dates' form in ArchivesSpace. The 'Label' field is set to 'Creation' and the 'Expression' field is set to 'between 1898 and 1908'. Red arrows indicate the mapping between the field labels and their values.

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

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

Unless otherwise directed, 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.

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

The 'Type' dropdown menu is shown with 'Single' selected.

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

The screenshot shows the 'Dates' form with a calendar overlay for May 1905. The date 1905-05-13 is selected in the calendar, and the 'Begin' field contains the normalized date '1905-05-13'. 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.

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

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

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

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

Undated materials: 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. Obviously, that makes the finding aid incomplete, but the work it will take to communicate that there is no date on the materials is a waste, because it needs to be approximated instead. If the legacy data specifically says the material has no date on it, add a **General Note** that says "Material is undated" or if the material has some dated and some undated material, "Also contains undated material."

Extents:

File level:

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, oversized folders, or boxes. Nothing needs to be recorded in Container Summary, Physical Details, or Dimensions.

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. One example is when a letter is being described, but it has an accompanying envelope. So 1 envelope and 3 sheets might be recorded in two separate extent entries as parts.

If the item is composed of unbound sheets, record the extent in terms of sheets only if it is one sheet. But if it was one sheet and written on both sides, you would have 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)

But for unbound sheets that have pagination, record the extent in pages:

Portion *	Whole
Number *	136
Type *	pages

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. 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 (i.e. "48 x 30 cm folded to 24 x 15 cm").

If the item is composed of bound volume(s), record the extent in terms of volumes. If the volume includes pagination, record the sequence in terms of pages in the Container Summary field within parentheses. If there are more than one volumes the pages can be recorded separately with a comma (i.e. 237, 98 pages) or as one combined number. If the volume does not include pagination, record “(unpaged)” in the Container Summary field. If the volume is really short, you can count the page numbers, but don’t go to great lengths of counting, opting for “unpaged” instead. 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		* Extents	
Portion *	Whole	Portion *	Whole
Number *	4	Number *	3
Type *	folded sheets	Type *	Volumes
Container Summary	(2 pages)	Container Summary	(201, 156 pages)
Physical Details		Physical Details	
Dimensions	28 x 22 cm folded to 22 x 14 cm	Dimensions	28 cm

If the item is a still image, record the extent type in terms of the image format (i.e., diagram, drawing, mock-up, painting, photograph, picture, postcard, poster, print, etc.) If the item is a scrapbook or photograph album, record the extent in terms of the album. 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.” If important, the production method of the image may be recorded. Record the Dimensions of the pictorial area of sheets 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, also record the dimensions of the sheet (e.g., “11 x 11 cm, on sheet 28 x 22 cm”). 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”).

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, 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

If the item is a piece of sound media, record the extent in terms of the media format (i.e., sound cassette (for audiocassettes), sound tape reel, sound disc (for phonograph records)). The playing time of the media item may be recorded as a parallel statement of extent in minutes in the Container Summary field, if readily available. Parallel statements of extent should be recorded within parentheses as “hr.” “min.” and “sec.” separated by commas or separated by colons if three units of time are supplied (i.e. 1:01:44). 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, quadraphonic, stereo, or surround), if important. 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 centimeters, then the width of the tape in inches.

Extents	
Portion *	Whole
Number *	1
Type *	sound tape reel
Container Summary	(3 min., 50 sec.)
Physical Details	analog, mono
Dimensions	15 cm, 0.25 in.

If the item is a piece of video media, record the extent in terms of the media format (i.e., film reel, filmstrip, overhead transparency, slide, videocassette, videodisc, or videoreel) The playing time of the media item may be recorded as a parallel statement of extent in minutes in the Container Summary field, if readily available. Parallel statements of extent should be recorded within parentheses as “hr.” “min.” and “sec.” separated by commas or separated by colons if three units of time are supplied (i.e. 1:01:44). 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. 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 centimeters, 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.

Extents	
Portion *	Whole
Number *	1
Type *	film reel
Container Summary	
Physical Details	analog, mono
Dimensions	28 cm, 16 mm

Extents	
Portion *	Whole
Number *	1
Type *	film reel
Container Summary	(14 min., 2 sec.)
Physical Details	black and white silent
Dimensions	12.5 cm, 8 mm

Extents	
Portion *	Whole
Number *	2
Type *	videodiscs
Container Summary	(8 min., 37 sec.)
Physical Details	black and white, silent
Dimensions	4.5 in.

If the item is a three-dimensional form, record the extent in terms of the object's format (e.g., coin, diorama, game, jigsaw puzzle, model, sculpture, specimen, toy). When necessary, the number and type of component parts may be recorded in the Container Summary. Record information on the base and applied materials of the item in the Physical Details field using terms from RDA 3.6.1.3, if important. 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").

If the item is computer media, record the extent in terms of the media format (i.e., computer optical disc, computer disk, etc.) The Dimensions recorded for computer media vary by format. For discs and disks, record the diameter of the disc in inches.

Additional format details that don't fit in any of these fields may also be recorded in a **General Note**.

Agent Links:

No need to add agent links at the file and item level. 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 series, subseries, etc. level you are working within contains all the same genre, and that heading has been added at the level above. A form heading describes what something IS, not what it is about. Its format or purpose. A genre is more like a category of a type of something, like westerns or thrillers. However, Library of Congress frequently combines the two definitions. For instance, “poetry” is what you use for poems as a format or a genre.

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 ephemera). For item level description, you will add the genre heading that reflects that item. Start typing in what you think might be the correct term and see if it can be easily selected from the drop-down menu:

The screenshot shows a search interface with a header labeled "Subjects". Below it is a search bar with a hamburger menu icon on the left and a red asterisk next to the label "Subject". The search bar contains the text "tax re". A dropdown menu is open below the search bar, displaying two results: "Tax returns" (highlighted in blue) and "Tax records".

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

The screenshot shows a search interface with a header labeled "Subjects". Below it is a search bar with a hamburger menu icon on the left and a red asterisk next to the label "Subject". The search bar contains the placeholder text "Type to search available records..". To the right of the search bar is a dropdown arrow. Below the search bar is a plus sign icon and a dropdown menu with two options: "Browse" and "Create".

Browse Subjects

Filtered By

- Text: poetry [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				

[Link to Subjects](#)

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

Subjects

Subject * Photocopies

Subjects * Letters

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

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

Notes:

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

- If professional titles precede a personal name, they are capitalized.
 - Capitalize full names of legislative, administrative, and judicial bodies, major wars, and official course names.
 - Do not capitalize academic disciplines and academic designations (e.g., "master's degree"), and omit periods from academic degree abbreviations (PhD, DDS)
 - Spell out whole numbers from one to hundred, round numbers, and any number beginning a sentence
 - Use numerals for units of measure, percentages, dates, and exact times (e.g., 5:36 p.m.; October 19, 1978)
 - Numbers in their plural form are spelled out. Numerals form their plural by adding s with no apostrophe (i.e. thirties, 1950s)
 - Do not use a dash if the word from or between is placed between the first of the two numbers; use through or to instead (e.g., from 1980 to 1995)
 - United States used as a noun should be spelled out. Used as an adjective, it should be U.S.
 - Acronyms should be used sparingly, but when used should appear in full capitals without punctuation. For clarity, spell out the acronym the first time you refer to it in the note (e.g., National Aeronautics and Space Administration, or NASA).
- Local exceptions to Turabian guidelines include:
- Use capitalization for titles and quotes for articles and episodes. Please note that copying and pasting from a Word document pastes a different font for quotes and apostrophes. If you do this you have to re-type them in ArchivesSpace. Other in-line formatting, such as italics, should not be used.

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 indicated information applicable to every item and file below it, you do not need to repeat notes. Notes usually used at the file and item level do not need labels, so leave that field blank. The following notes are the most likely to be utilized at the file and item levels:

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

Examples:

Donor restricted until 2015. Permission to use materials must be obtained from the Supervisor of Reference Services.

Restricted due to presence of social security numbers and medical records. Permission to use materials must be obtained from the Supervisor of Reference Services.

Existence and Location of Copies: If you have copies of materials, such as photocopies, transcriptions, digital scans, etc. their presence should be noted in an Existence and Location of Copies note, and NOT

as their own separate archival object. Place this note at the level where the original is, and indicate what box and folder the copy is located in. This may mean containers that contain only copies within them are attached in an instance at the collection level, and not within the inventory below.

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

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

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

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 the item, use the phrase "Title from recto." If it is from the back, say "Title from verso." Otherwise, state the location the title was taken from, i.e., "Title from second page." "Title from original inventory." "Title from folder."

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.

The General Note can also fill in for the Method of Reproduction note (a cataloging note type). If the material is a reproduction, the date of the original material is used in the date field, and the date and place the reproduction was created is recorded in a General Note. Example: Microfilm. Provo, UT : Brigham Young University, 1983.

Examples of general notes:

Also contains undated material.

Notebook is undated.

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 General note).

Spiral-bound copy with appendices.

Article is about Salem landmarks.

Annotation on verso in unknown hand: "Women's Congress at Vienna. Lady Tata will represent the National Council of Women of India."

Signed "A.J.A.R."

See Series 5 Subseries 3 for more information on this publication.

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

Helen Foster Snow with Ts[...] at Tiananmen Square.

Handwriting illegible.

Scope and Contents: The scope note is used when there is context to be included about the item, including dates, 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. This note is often used when you feel the need to restate the entire archival object description in order for the patron to fully understand what the object is and which the title parameters did not allow you to do.

Example:

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.

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. 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 General 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**.

Example:

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).

Instances:

If there are already containers attached to a record, add the container number by selecting the Type and then the Top Container. Select the Type "Text" for written/typed materials, "Graphic Materials" for photographs or other visual materials, "Audio" and "Moving Images" for audiovisual materials,

“Computer Disks” for computer media, “Realia” for any kind of artifact, and “Mixed Materials” if you need to express a type that is more than one of these.

The screenshot shows the 'Instances' section of a software interface. It features a 'Type' field with the value 'Text' and a 'Top Container' field with a dropdown menu showing 'Box 1: [31197231044469]'.

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

Create Top Container

The screenshot shows the 'Create Top Container' form. It includes a 'Container Profile' field with a search prompt, a 'Container Type' dropdown menu, and an 'Indicator *' text input field. Red arrows point to the 'Container Type' and 'Indicator *' fields.

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

The screenshot shows the 'Child Type' field set to 'Folder' and the 'Child Indicator' field set to '1'.

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

The screenshot shows the 'Add Container Instance' form. It includes fields for 'Child Type' (Folder), 'Child Indicator' (1), 'Grandchild Type', and 'Grandchild Indicator'. A red arrow points to the 'Add Container Instance' button.

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

Child Type	Folder
Child Indicator	1-5

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

If you are using an Existence and Location of Copies note to state the location of a copy of something, instances for that box or folder where the copy is stored is not attached with that archival object. It is attached at the collection level instead.

Physical processing:

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

Call Number	File [#] (if applicable)	Title, date	Box	Folder
-------------	--------------------------	-------------	-----	--------

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

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

Numbering: Folders and physical items need to be numbered in pencil according to their component unique ID, combined with the series and subseries, and if applicable, file numbers they belong to in a decimal format.

Folders:

A folder that represents a file level description assigned the number 1 under subseries 1 and series 1 should have "File 1.1.1" written on the folder as shown in the template below.

MSS 2219	File 1.1.1	Helen Foster Snow letters	Box 1	Folder 1
----------	------------	---------------------------	-------	----------

If it's just File 1 listed under the collection level, that's all that gets recorded.

MSS 2219	File 1	Helen Foster Snow letters	Box 1	Folder 15
----------	--------	---------------------------	-------	-----------

Items:

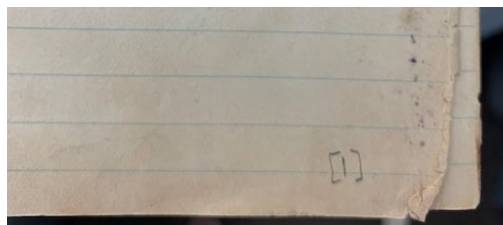
Numbering of items takes place on the item itself, lightly, in pencil. Write the number in decimal composite form as well on the lower-right back corner of paper-based documents. Place it in brackets.

Examples: Item 1 under series and subseries 1 will be [1.1.1]. The folder looks like this if there's no file level description in the finding aid above that item:

MSS 2219	Helen Foster Snow letter to Edgar Snow	Box 1	Folder 15
----------	--	-------	-----------

But the letter itself is marked [1.1.1]

If it's just Item 1 under the collection level, just write [1].



Photographs: Sleeve photographs in as few sleeves as possible, using the multiple pocket pages to combine them together. Unless otherwise directed, photographs being separated out to the vault and large collections of photographs should be placed in letter size folders and letter-size boxes to minimize the movement of the material. Photographs are also numbered (sequentially throughout the collection) and the number is written in pencil on the back of the photograph in brackets, or on the plastic sleeve in pen. The corresponding negative will receive the same number with an “N” prepended to it. If negatives or photographs are being stored in buffered and unbuffered sleeves, the numbers may be written in pencil on those instead, depending on what the curator wants. Buffered envelopes are for any kind of film material (such as negatives), and unbuffered are for prints.

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

The template spreadsheet for audiovisual material being sent to the lab to be digitized is found on the Central Processing Unit team board in Basecamp: <https://3.basecamp.com/4193180/buckets/11418965/vaults/1674553508> Once this is filled out, it is uploaded to the relevant project in Basecamp.

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