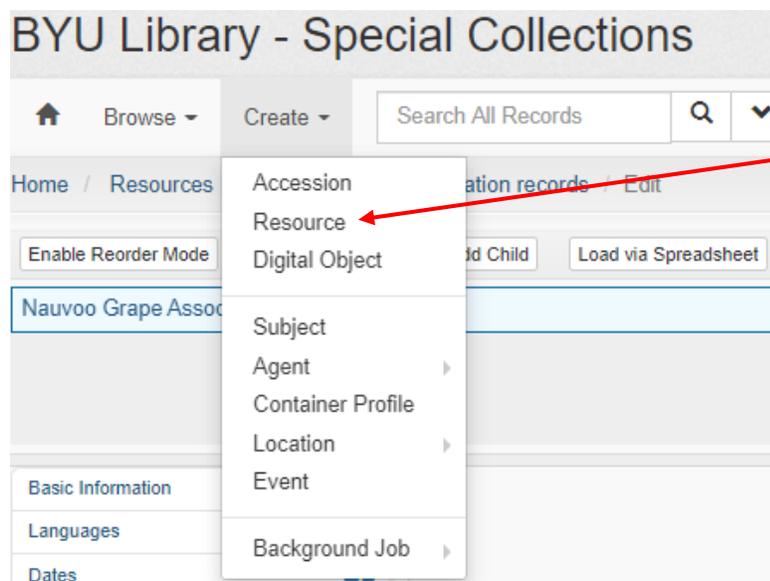


Collection-level Description

Creating a resource record:



In ArchivesSpace, click create, then select resource to create a new resource record.

Title: Enter the title supplied by the curator in the processing plan into the Basic Information Title field:

Basic Information

Title *

Titles are recorded in sentence case.

Identifier: Record the call number supplied by the curator in the processing plan in the first box on the right:

Identifier *

Level of Description: Select the level of description for the finding aid. If you are describing only at the collection or series level, select Collection. If you have a collection with only one file or one item, select File or Item.

Level of Description *

Resource Type: Select Collection for artificial aggregations, Papers for aggregations produced by individuals or families, or Records for aggregations produced by corporate bodies.

Resource Type

Do NOT click the publish box. This will be done by the cataloger after the finding aid has been reviewed.

Publish?

Languages: Select the language found in the collection, as well as the script of that language. This will most often be English and Latin. When describing a non-textual item (e.g., photograph, artifact), record the term "No linguistic content." If there is more than one language, click "Add Language" to add multiple languages. If you have multiple languages in a collection, you will need to add each of the languages separately, then add a Language Note to describe the language distribution in the collection:

• Languages

Language *	English
Script	Latin

Language of Materials Note

Persistent ID

Label

Publish?

Content *

Mixed Content Enabled -- Type << for elements or highlight text to wrap

Make sure to click the Publish box.

Do not record languages if they aren't significantly represented in the collection.

Examples of language notes include:

Materials are in English and Spanish.

Materials in English with some correspondence in Welsh, with a translation in English.

Dates: The label drop-down in the date field is almost always "Creation," reflecting when the collection material was originally created (do not include reproduction dates). The expression field box will reflect the full date range or single date of the collection materials, stated from broad to narrow (year followed by month followed by day) in DACS format (e.g. 1925-1964 or 1955 December 3). In cases where the earliest and latest dates are within the same year but are in different months, the year will be included followed by the first month separated from the last month by a hyphen (e.g., 1973 March-June). If the earliest and latest dates are within the same month, the year and month will be listed with the days separated by a hyphen (e.g., 1985 September 9-14). If the recorded dates are uncertain, the word "approximately" should be prepended to the date expression. Other phrases, such as "before" or "between" may be used, as well as references to decades or centuries. Date qualifying phrases should always be recorded in lower-case. Examples of date expressions:

Examples of date expressions include:

1875-1975

1973 March-June

1985 September 9-14

approximately 1901-1903

before 1964

between 1910 and 1919 *Use instead of 1910s

1971 or 1972

* Dates	
Label *	Creation
Expression *	1960

The type of date (i.e., "Single" or "Range") should also be selected from the drop-down list, and the beginning and end dates of a span recorded in ISO 8601 format: xxxx, xxxx-xx or xxxx-xx-xx. Do not forget leading zeros on the months or days. If the dates recorded are uncertain, this should be indicated in the Certainty field with the appropriate type. The calendar and era drop-down (usually ce and Gregorian) should be record as well.

Type *	Single
Begin	1960 <small>e.g. YYYY, YYYY-MM, or YYYY-MM-DD</small>
Certainty	
Era	ce
Calendar	Gregorian

At least one date must be recorded for each Resource. Add a new date entry for bulk dates, or if a significant gap is present in the date span.

Extent: Record the extent of the collection in terms of container numbers and types in the drop-down selections of "Portion," "Number," and "Type." If only one container type is used to house the collection, the Portion field should be set to "Whole". If multiple types of containers are used to house the collection (e.g., boxes, cartons, oversized folders), a separate extent subrecord should be recorded for each container type. Each subrecord should have a Portion field value of "Part".

* Extents		* Extents	
Portion *	Whole	Portion *	Part
Number *	1	Number *	1
Type *	carton	Type *	carton

For top-level Resource entries, each container-based extent statement should also include a parallel statement of extent in linear feet in the Container Summary field of the extent subrecord. Standardized linear footages for many containers may be found [here](#). For some containers with variable widths, such as folders to be placed in a shared box, the linear footage should be measured using a tape measure. For

standard boxes or cartons, divide the length measurement by 12 to get the linear feet value (e.g., folders measuring 4 inches (the length they will take up in a box facing outward on the shelf) would be recorded as 0.33 linear feet). For oversize folders, calculate linear footage by determining the percentage of the box that the oversize folders will fill and multiply that by the overall linear footage of the oversize box. Parallel statements of extent should be recorded within parentheses. Decimal values should use a leading zero, if less than 1, and be rounded to the nearest hundredth. The words "foot" or "feet" should be abbreviated as "ft."

Portion *	Part	Portion *	Whole
Number *	1	Number *	5
Type *	carton	Type *	folders
Container Summary	(1 linear ft.)	Container Summary	(0.05 linear ft.)

EAD ID: Record the EAD ID value for the resource record in this format: UPB_MSS1187 or UPB_UA1197

EAD ID	UPB_MSS9426
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Finding Aid Title: Finding aid titles are recorded by prepending the phrase "Register of" to the Title field value (e.g., Register of Office of the President records).

Finding Aid Title	Register of Nauvoo Grape Association records
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Finding Aid Filing Title: Filing titles are inverted forms of the resource record title intended to facilitate browsing by title. For Resources where the Title field value includes only one personal name, the filing title should begin with that person's last name with their first name, additional names, or initials (depending on how the name is displayed in the title) following in parentheses:

-Snow (Helen Foster) papers

-Smoot (A. O.) papers)

If the Title field entry includes the names of two or more individuals with the same surname, the filing title should begin with that last name with the first name(s) and/or initials in parentheses:

-Harris (Franklin S. and Estelle) papers

If more than one individual's name is included in the Title field value, but they do not share a surname, each name should be inverted separately:

-Westwood (P. Bradford) and Daines (J. Gordon) collection on Brigham Young University

Titles for collections where the creator is a family or corporate body, as well as formal titles and devised titles without a name of creator segment, should not be inverted:

-Cordon family papers or Department of History records

Finding Aid Date: Record this in DACS format. Never update this field if you are editing an existing resource record.

Finding Aid Date

2021 February 3

Finding Aid Author: Record your name in natural order here, and separate multiple authors with a comma.

Finding Aid Author

Karen Glenn, Cory Nimer

Description Rules: Always select “Describing Archives: A Content Standard.”

Language of Description: Record the language in which you are writing the resource record. In most cases you will select “English.”

Script of Description: Record the script of the language you are writing the resource record in. For English, this is “Latin.”

Description Rules

Describing Archives: A Content Standard

Language of Description *

English

Script of Description *

Latin

Language of Description Note: Record a sentence describing the language and script the finding aid is in. This will most of often be “Finding aid written in English in Latin script.”

Finding Aid Status: This should always be selected as “In Progress,” whether you are editing an existing resource record or adding a new one.

Notes: *Always check all “Publish” boxes when adding notes.

Arrangement Note: If series are present in the collection, record an arrangement note in this format:

Arranged in four series: 1. Jack Hale personal papers, 1920-1965. 2. Jack Hale business correspondence, 1930-1956. 3. Jack Hale papers on the Kiwanis Club, 1933-1965. 4. Jack Hale diaries, 1920-1965.

If series are not present in the collection, record an arrangement note if it is applicable. Examples:

Retained in original order.

Arranged alphabetically.

Biographical/Historical Note: This is the one note that requires a label. If it’s biographical (for a person or family), write “Biographical History” in the label. If it’s Administrative (for a corporate body), write “Administrative History” in the label. Then record the note in the content field according to the directions found [here](#).

Conditions Governing Access Note: There are three common types of access notes you will use.

For most collections: “Open for public research.”

For University Archives collections: “Restricted. Closed for 50 years from the date of creation of the records, and thereafter open to the public in accordance with the L. Tom Perry Special Collections Restriction Policy. Requests to access restricted materials in the University Archives should be submitted to the University Archivist.”

For any collection with photographs and negatives you know will be stored in the freezer or the Cold Vault: “Condition restricted. Items kept in cold storage; access requires 24 hours advance notice.”

If restrictions are more complex and are noted as such on the processing plan, leave this note for your supervisor to edit.

Conditions Governing Use Note: Always use this template: “It is the responsibility of the researcher to obtain any necessary copyright clearances. Permission to use material from this collection must be obtained from Reference Services at specialcollections@byu.edu.”

Existence and Location of Copies: If you have a collection that includes copies of its own material, record the type of copy (e.g., transcriptions, photocopies, microfilm, etc.) and state where those copies are located. This note only appears at the collection level if the collection is being described at the collection level only, or if the copies span multiple series, files, and items in the inventory below.

Example: Photocopies of correspondence available in box 1 folder 2.

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 (if available).

Processing Information: Record a standardized, formatted note indicating when the materials were processed and by whom. The template for this note is below:

[Action]; [Action agent]; [Date of action]. [Note].

The recorded action should always be "Processed," and the name of processor given in natural order. The date of processing should be recorded in Turabian style (e.g. December 20, 2020). A note describing processing actions should be recorded in narrative fashion. If the materials have been processed multiple times, each action should be recorded in a separate processing information note. This note should also include information about how and to what extent the collection was processed, including the origin of description.

Examples of processing notes:

Processed; Jacob Smith; 2014. The original arrangement and folder titles were retained in most cases. Exceptions include legal-sized material, which was rehoused into appropriate containers.

Processed; Thomas Jones; 2017. Materials in addendum were rehoused and original folder titles retained, then arranged into series matching the existing collection. Materials were retained in boxes at the end of the collection and not interfiled with previous installments.

Scope and Contents Note: This note will summarize the nature and subject focus of the content found in the collection. Try to include the following:

- Function(s), activity(ies), transaction(s), and process(es) that generated the materials being described;
- Documentary form(s) or intellectual characteristics of the records being described;
- Content dates;
- Geographic area(s) and places related to the content or production of the materials;
- Subject matter present in the materials, such as topics, events, people, and organizations;
- Gaps in the collection contents.

Subjects, formats, or other components of the note should have significant representation in the materials being described (i.e., at least 20 percent of the content). Scope and Content notes should not exceed one paragraph in length. Other Turabian and local guidelines are as follows:

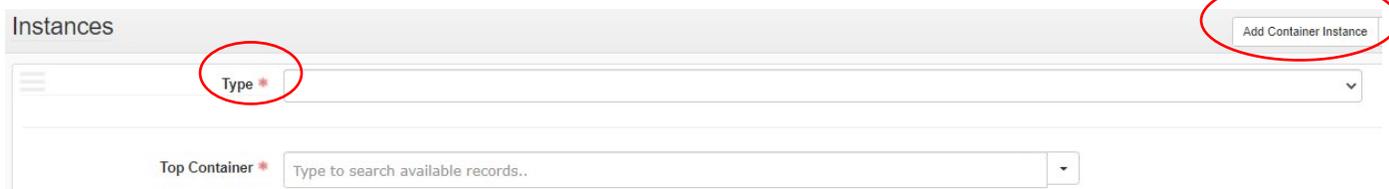
- If professional titles precede a personal name, they are capitalized.
- Capitalize full names of legislative, administrative, and judicial bodies, major wars, and official course names.
- Do not capitalize academic disciplines and academic designations (e.g., "master's degree"), and omit periods from academic degree abbreviations (PhD, DDS)
- Spell out whole numbers from one to hundred, round numbers, and any number beginning a sentence
- Use numerals for units of measure, percentages, dates, and exact times (e.g., 5:36 p.m.; October 19, 1978)
- Numbers in their plural form are spelled out. Numerals form their plural by adding s with no apostrophe (i.e. thirties, 1950s)
- Do not use a dash if the word from or between is placed between the first of the two numbers; use through or to instead (e.g., from 1980 to 1995)
- *United States* used as a noun should be spelled out. Used as an adjective, it should be U.S.

- Acronyms should be used sparingly, but when used should appear in full capitals without punctuation. For clarity, spell out the acronym the first time you refer to it in the note (e.g., National Aeronautics and Space Administration, or NASA).
- Place periods and commas inside quotation marks
- Always spell out the full name of the Church of Jesus Christ of Latter-day Saints.
- Follow headline-style capitalization rules, including capitalizing all major words, including “a” “an” or “the” if it is the first word in the title. When listing periodicals, do not capitalize the leading “the” (i.e. the New York Times)
- Quotations around different types of titles are approved. In-line formatting in italics is too difficult to maintain in ArchivesSpace, so Turabian’s rule of italics for book, journal, and newspaper titles and quotations for articles is not used. Do not copy straight from a Word document unless you have [disabled smart quotes in Microsoft Word](#).

General Note: This note is used to record information that does not fit in other notes. If you have a collection with only one item or folder in it, this note might be more common at the collection level. See the General Note section of the [Item and File Level Description](#) documentation for more examples of General Notes.

Instances: Only link top-container instances to the resource record if there are no series, files, or items laid out in an inventory. The only exception is if you are reflecting a folder or box of *copies* of material whose content spans several files, series, or items below.

Click “Add Container Instance,” and select the Type:



The screenshot shows the 'Instances' section of the ArchivesSpace interface. At the top right, there is a button labeled 'Add Container Instance' which is circled in red. Below this button is a dropdown menu labeled 'Type' with a red circle around it. Underneath the 'Type' dropdown is a search field labeled 'Top Container' with a red asterisk and the placeholder text 'Type to search available records..'. The search field has a dropdown arrow on its right side.

Type describes the type of materials within the container you are about to link, such as Maps, Microform, Books, Notated Music, Graphic Materials for photographs and illustrations, Realia for artifacts, Audio for tapes and phonograph records, Moving Images for film or videocassettes, Text for written or printed words, and Computer Disks for floppy disks and other computer media. Use Mixed Materials if the container has multiple types of material.

Typing a number into the Top Container field will pull up any associated containers already attached to the record with that number. Then it can simply be selected.

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

Container Profile

→ Container Type

→ Indicator *

Once the top container is added, add the Child Type (if applicable) from the drop-down menu, which will be the secondary container type, and the Child Indicator number.

Instances

Type *	Text
Top Container *	Box 1: Series 1
Child Type	Folder
Child Indicator	1

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.

Updating an existing resource record:

If you are only editing an existing Resource record, review all content for current standards compliance. If you've added an accession to the collection, update the record to reflect the new accession (such as the scope and contents note, the date ranges, instances, etc.)

Whether you are adding an accession or making other significant edits, make sure to add another processing note to reflect when and what was done to the collection, and in addition, you'll add a Revision Statement. Revision Statements are underneath the Finding Aid Data section. Click "Add Revision Statement." Add the Revision Date in DACS form, and the Revision Description, which will contain a statement of what was done, followed by a semicolon, then the author's name. Do NOT click the publish button.

Revision Statements

	Revision Date *	19 March 2020
	Revision Description *	Added 4 cartons to the collection. Finding aid updated to reflect addition; Peter Hoyt
	Publish?	<input type="checkbox"/>