CREATING A NEW RESOURCE RECORD (Finding Aid)

Open Archivists’ Toolkit (AT)
Logon
Select ‘Resources’ from left menu bar

Select ‘List All’ from top icon menu bar, to view all previously created Resources
To create a new resource record, select ‘New Record’ from top icon menu bar
Pop-up screen for a new resource record will appear – follow directions below.
ENTERING COLLECTION-LEVEL INFORMATION. Four tabs at top of Resource screen include space to enter information from the finding aid at the collection level – (1) ‘Basic Description;’ (2) ‘Names & Subjects;’ (3) ‘Notes Etc. & Deaccessions;’ and (4) ‘Finding Aid Data.’

(1) ‘Basic Description’ tab

Select ‘Level’ as “collection”

Collection title ⇒ ‘Title’

Dates ⇒ ‘Date expression’ (enter complete date range of collection in “year month day” format)

Dates ⇒ ‘Inclusive dates’ (start and end years only, do not use if collection ‘undated’)

Language of collection materials ⇒ select from ‘Language’ drop-down menu (default is English)

Collection number (MS #) ⇒ ‘Resource Identifier’ (single space between “MS” and “#”)

Linear feet (size of collection) ⇒ ‘Extent Number’ (default is “Linear feet” in the drop-down menu)

# of boxes in collection ⇒ ‘Container summary’ (format as “(# boxes)” with the number of boxes in parentheses, example on the left)
(2) ‘Names & Subjects’ tab

Include “Indexing terms” (Names (2a) and Subjects (2b)) under this tab.

### Names

<table>
<thead>
<tr>
<th>Name</th>
<th>Name Link Function</th>
<th>Name Link Creator / Subject: Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agassiz, Louis (1807-1873)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>American Forestry Association.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arnold Arboretum.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brandegee, Townsend 5th, 1843-1925</td>
<td>Subject</td>
<td></td>
</tr>
<tr>
<td>Buttefield, H. M. (Harry Morton) b.</td>
<td>Subject</td>
<td></td>
</tr>
<tr>
<td>California Academy of Sciences.</td>
<td>Source</td>
<td></td>
</tr>
<tr>
<td>California School for the Blind.</td>
<td>Source</td>
<td></td>
</tr>
<tr>
<td>California Theater.</td>
<td>Source</td>
<td></td>
</tr>
<tr>
<td>Carroll, Alice C.</td>
<td>Subject</td>
<td></td>
</tr>
</tbody>
</table>

### Subjects

<table>
<thead>
<tr>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diaries</td>
</tr>
<tr>
<td>Gardening</td>
</tr>
<tr>
<td>Gibraltar, Strait of</td>
</tr>
<tr>
<td>Graveyard Manor Gardens [England]</td>
</tr>
<tr>
<td>Hawaii</td>
</tr>
<tr>
<td>Horticulture</td>
</tr>
<tr>
<td>Hudson River [N.Y. and N.J.]</td>
</tr>
<tr>
<td>Lisbon [Portugal]</td>
</tr>
<tr>
<td>London [England]</td>
</tr>
</tbody>
</table>

(2a) NAMES

To add a person (MARC 100), family (MARC 100), or corporate name (MARC 110), select “Add Name Link.”

In pop-up menu, search for name you’d like to add.

If listed, (1) select (highlight) name; (2) select “Subject” or “Creator” in the ‘Function’ drop-down menu; and (3) select “Link” to add the subject/creator to your record. Each collection is required to have at least one “Creator.”

If not listed, select “Create Name” or to create a new name.

To create new name (see left): select “Create Name” then select “Person” (2a.i); “Corporate Body” (2a.ii); or “Family Name” (2a.iii)
(2a.i) If “Person” selected:

Enter last name as “Primary Name,” and then the first name and any other portion of name as “Rest of Name.” Fill in the remaining boxes up to “Fuller Form,” as applicable.

For “Source,” select in the drop-down menu either “local source” (if name is only found locally, not in Library of Congress) or “NACO Authority File” (if located as “Authorized Heading” in Library of Congress: http://authorities.loc.gov). A person name is identified as MARC 100 in Library of Congress.


Select “OK.”

Once appropriate name selected (highlighted), select “Subject” or “Creator” from the drop-down menu for “Function” and select “Link.”
(2a.ii) If “Corporate Body” selected:

Enter name of corporation, organization, club, etc. as “Primary Name.” Fill in the remaining boxes up to “Qualifier,” as applicable.

For “Source,” select in the drop-down menu either “local source” (if name is only found locally, not in Library of Congress) or “NACO Authority File” (if located as “Authorized Heading” in Library of Congress: http://authorities.loc.gov). A corporate body is identified as MARC 110 in Library of Congress.


Select “OK.”

Once appropriate name selected (highlighted), select “Subject” or “Creator” from the drop-down menu for “Function” and select “Link.”
(2a.iii) If “Family Name” selected:

Enter family name (e.g. Aguirre family) as “Family Name.” Only capitalize the first letter of the family name – do not capitalize “family.”

For “Source,” select in the drop-down menu either “local source” (if name is only found locally, not in Library of Congress) or “NACO Authority File” (if located as an “Authorized Heading” in Library of Congress: http://authorities.loc.gov). A family name is identified as MARC 100 in Library of Congress.


Select “OK.”

Once appropriate name selected (highlighted), select “Subject” or “Creator” from the drop-down menu for “Function” and select “Link.”
(2b) **SUBJECTS**

To add a subject, select “Add Subject Link.”

In pop-up menu, search for subject you’d like to add.
If listed, select (highlight) name and select “Link.”
If not listed, select “Create Subject” to create a new subject.

*** See Appendix B for extended information on searching for and validating subject terms in Library of Congress.
To create new subject, select “Create Subject.”

Enter subject into “Subject Term.”

For “Type,” select in the drop-down menu. See descriptions of each “Type” option below under “Subject Types.”

For “Source,” select in the drop-down menu. Select “lcsh” if found on Library of Congress Authority Headings site. If not found there, select “local.”

Select “OK.”

**The newly created subject term will automatically be linked to resource; no other action required.**
(3) ‘Notes Etc. & Deaccessions’ tab

** In the drop-down menu visualized above, select appropriate note (e.g. ‘Biographical/Historical note’) to be added. Notes listed below are in order of finding aid template components.

**Note:** When adding a note as shown below, the “Note Label” box may or may not include default text. This box allows you to change the default “Type” text with a new title. This is exemplified in the “Comments” note example below where the ‘General Note’ is used for adding “Comments” and the text “Comments” is added into the “Note Label” box, overriding the default, ‘General Note,’ text.

Abstract ➔ use ‘Abstract’
Biography/History → use 'Biographical/Historical note'

Scope and Content → use 'Scope and Contents note'

Arrangement → use 'Arrangement'
**Condition and Preservation** → use ‘Physical Characteristics and Technical Requirements note’

**Citation** → use ‘Preferred Citation note.’ Fill in collection specific title and MS# into the default text provided in the note.

**Collection Access Restrictions** → use ‘Conditions Governing Access.’ Default text is provided: “This collection is open for research.” Add additional access restrictions text as needed.
**Collection Use Restrictions** → use ‘Conditions Governing Use note.’ Default text is provided: “The San Diego History Center (SDHC) holds the copyright to any unpublished materials. SDHC Library regulations do apply.” Add additional use restrictions text as needed.

**Processing Information** → use ‘Processing Information note.’ Fill in the processor name and date processed into the default text provided in the note.

**Language of materials** → use ‘Language of Materials note.’ Add this note only if language(s) other than English are present.
Separated materials ➔ use ‘Separated Materials note’

Comments ➔ use ‘General Note’ and type “Comments” into the Note Label box.

Provenance/Accession ➔ use ‘Immediate Source of Acquisition note’.
(4) ‘Finding Aid Data’ tab

Planned file name for XML/EAD file → ‘EAD Finding Aid Unique Identifier’ (e.g., “ms38.xml” for collection MS 38)

Title page title for collection → ‘Finding Aid Title’ (Add “Guide to the” to the beginning of collection title) (e.g., “Guide to the Kate Sessions Collection”)

Collection title for alphabetical filing (as prescribed by Online Archive of California (OAC) rules) → ‘Finding Aid Filing Title’ (e.g., “Sessions (Kate) Collection” or “Allied Craftsmen of San Diego Records”). When applicable, list last name first followed by first name in parentheses (e.g., “Sessions (Kate) Collection”).

Date finding aid completed and entered into Archivists’ Toolkit → ‘Finding Aid Date’

Name of person who authored finding aid → ‘Author’

Select “Description Archives: A Content Standard” → ‘Description Rules’

Default text of “Finding aid is in English.” → ‘Language of Finding Aid’

Add text remarking on funding for processingfinding aid creation, if applicable → ‘Sponsor Note’
CONTAINER LIST

To begin a container list select ‘Add Child’ in lower left of Resource record screen (see image to right). Follow hierarchy of container list when adding additional “children” or “siblings” (e.g. add a “child” when adding a new folder to a collection or series, or add a “sibling” when adding another series after a series or another folder after a folder).

***

Another option for starting a container list is using Rapid Data Entry (RDE) (option to the right of “Add Child” and “Add Sibling”). RDE allows you to quickly add multiple series or folders to the Resource record without having to individually add them via “Add Child” or “Add Sibling.”

SERIES: RDE screen for adding series (see below):

FOLDERS: RDE screen for adding folders (see below):

RDE Sticky fields: Those fields that are highlighted in red are known as “sticky fields” which means that the text types in those fields will “stick” when you add another RDE (by selecting the “+ 1” icon in the bottom right of the pop-up screen. Using the “+ 1” icon is the quickest way to continually add additional series or folders, one right after the other.
(1) ‘Basic Description’ tab (after selecting “child” to start adding container list – see previous page)

(1a) **Adding Series**
Select ‘Level’ as “series”
- Series identifier (e.g., “Series I:” or “Series II:” or etc.) → ‘Component Unique Identifier’
- Series title → ‘Title’ (only capitalize first letter of first word, unless proper name, as applicable)
- Series dates → ‘Date expression’ (enter in ‘year month day” format and/or undated, as applicable)
- Series dates → ‘Inclusive dates’ (include start and end years only; do not use if ‘undated’)

(1b) **Adding Folders (“file”)**
Select ‘Level’ as “file”
- Folder title → ‘Title’ (only capitalize first letter of first word, unless proper name, as applicable)
- Folder dates → ‘Date expression’ (enter in ‘year month day” format and/or undated, as applicable)
- Folder dates → ‘Inclusive dates’ (include start and end years only; do not use if ‘undated’)

(1c) **Adding Items**
Select ‘Level’ as “item”
- Item title → ‘Title’ (only capitalize first letter of first word, unless proper name, as applicable)
- Item dates → ‘Date expression’ (enter in ‘year month day” format and/or undated, as applicable)
- Item dates → ‘Inclusive dates’ (include start and end years only; do not use if ‘undated’)
(1b, 1c) Adding physical location of folders and items (e.g., Box #, folder #)

1) Select “Add Instance”

2) Select “Text”

3) Choose “Container 1 Type”
   Select “Box-folder” (as appropriate). Other options are available in the “Type” drop-down menu such as “Box,” etc., but most cases will be “Box-folder.”

4) Type in the “Container 1 Indicator”
   Enter “1:1” for a location of Box 1 folder 1 or “1:1-2” for Box 1 folders 1-2, etc.
   Select “OK”

For folders where all contents are located in an Oversize Collections drawer, type “Oversize Collections D#” (specifying drawer number (D#) with D1, D2, or D3, etc.) as the location in the “Container 1 Indicator” box.

5) Once added, the newly created “instance” will be listed in the ‘Instances’ box (see example to left).
(2) ‘Notes Etc.’ tab (for folder or item level)

Above displays a collection ("resource record") with five series. The fourth series, “Manuscripts and Articles,” contains three folders of which the third is highlighted in the left navigation bar. The body of the record displays the ‘Notes Etc.’ tab for the folder where additional information can be included with the folder’s record to further explain the contents of the folder.

Below are instructions on how to add an “includes:” or “scope and content” note to further explain the contents of the folder. The same can also be done for items.

1) Select ‘Scope and Contents note’ from drop-down menu.

2) Type “Includes:” in the ‘Note Label’ box (this will override “Scope and Contents note” as the note’s title). Other options are to type “Entries of interest:” or “Scope and Content,” etc. Include description of folder contents or item in ‘Note Content’ (see example to right). Include note “(in Oversize Collections D#)” for specific items listed that are located in an Oversize Collections drawer (specifying drawer number (D#) with D1, D2, or D3, etc.)
Creating PDF, HTML and EAD/XML files

PDF and HTML versions
1) Select ‘Reports’
2) Select “Finding Aid” from drop-down menu for ‘Select Report.’
3) Select either “PDF File” or “HTML File” from ‘Select Output’ drop-down menu.
4) Select “Save”
5) Save file using the following file name formatting:
   - ms#.pdf (e.g., ms38.pdf for PDF file of MS 38)
   - ms#.html (e.g., ms38.html for HTML file of MS38)

EAD/XML version
1) Select ‘Export EAD’
2) Select check-box next to “Number component level?” This is a required element for Online Archive of California (OAC).
3) Save file using the following file name formatting:
   - ms#ead.xml (e.g., ms38ead.xml for EAD file of MS 38). File will later be renamed to ms#.xml after further detailed edits (see Appendix C).

*** See Appendix C for details on additional edits to HTML and EAD/XML files for compatibility with website needs and Online Archive of California requirements, respectively.
APPENDIX A  
Basic Tactics for and Hints when using Archivists’ Toolkit (AT)

1. Remember to constantly SAVE your work. AT does crash/freeze at times and information can be lost.

2. To start a new line/paragraph, leave a double space between the paragraphs, otherwise the sentences will continue to run on the same line.

3. When adding a “Scope and Content” note to a folder or item in the ‘Notes Etc.’ you can include more than one “Scope and Content” note. This will be helpful when entering information for a diary where you will have a note for the scope and content of the diary as well as a note for the entries of interest from the diary. For the latter, you can type “Entries of interest:” into the ‘Note Label’ box to override default ‘Type.’
APPENDIX B

Subject types
To determine the “type” of the subject term, you can first check for the term in the Library of Congress Authority Headings search engine (http://authorities.loc.gov) – this site will provide you with the information necessary to select the “type” should the term be listed on this site. If not, follow the directions below for pointers on identifying the correct type. Instructions for using the Library of Congress Authority Headings site (2) are listed following the pointers (1) below.

(1) Here are some pointers for determining which “Type” to select for each “Subject Indexed”

<table>
<thead>
<tr>
<th>Type</th>
<th>Source</th>
<th>Scope Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Function (657)</td>
<td>Function (657)</td>
<td>Geographic Name (651)</td>
</tr>
<tr>
<td>Genre/Form (655)</td>
<td>Genre/Form (655)</td>
<td>Geographic Name (651)</td>
</tr>
<tr>
<td>Geographic Name (651)</td>
<td>Geographic Name (651)</td>
<td>Geographic Name (651)</td>
</tr>
<tr>
<td>Occupation (656)</td>
<td>Occupation (656)</td>
<td>Geographic Name (651)</td>
</tr>
<tr>
<td>Topical Term (650)</td>
<td>Topical Term (650)</td>
<td>Geographic Name (651)</td>
</tr>
<tr>
<td>Uniform Title (630)</td>
<td>Uniform Title (630)</td>
<td>Geographic Name (651)</td>
</tr>
</tbody>
</table>

Function (657) – activity or function that generated collection materials
Genre/Form (655) – genre or format of item, medium in which presented (e.g. “diaries”)
Geographic Name (651) – place, location (e.g. “San Diego (Calif.)” which is validated in Library of Congress)
Occupation (656) – name of occupation, job (in most cases, though, this will be a Topical Term 650)
Topical Term (650) – describing content or topic of collection materials (used for most subject terms)
Uniform Title (630) – e.g. title of magazine, newspaper

(2) Using the Library of Congress Authority Headings site (http://authorities.loc.gov)

Visit http://authorities.loc.gov (see left) and select “Search Authorities.” On the next screen, type in the subject term to be searched (e.g. “families in example below) and select “Begin Search.”
The results page will look like the example below.

If the term is found in the results list (as above), look for the “Authorized” or “Authorized Heading” button to the left of the term – this button identifies terms that are “authorized” as an authority heading by the Library of Congress. If the term is found in this manner, it’s ‘Source’ will be identified as “lcsh” (see page 9 for ‘Source’ instructions specific to Subjects).

If the term is not found in the results list, use pointers listed above for determining the term’s ‘Type.’

If the term is found, select the “Authorized” or “Authorized Headings” button and follow the screens by selecting either “Authority Record” or the correct term until you reach the official authority record for the term you searched.

LC control no.: sh 85047089
LCCN permalink: http://lccn.loc.gov/sh85047089
HEADING: Families
000 01 555 a a00004939 458
In the record, the ‘Type’ can be found by locating the “1XX” number (e.g. 157, 155, 151, 156, 150, or 130) – these numbers translate to the “6XX” numbers listed above for the different types (e.g., 151 is 651, 130 is 630, etc.).

Find “Families” in the example to the left. The term is located next to “150” which identifies its ‘Type’ as “Topical Term (650).”

Should you find the term’s ‘Type’ following these instructions, the term’s ‘Source’ will be listed as “Library of Congress Subject Headings (lcsh)” (see “Source”).
APPENDIX C

Guidelines for exporting and posting finding aids online

Finding Aid Output

1. **PDF** – Create and print PDF version for inclusion in the finding aid folder at the beginning of the physical collection.

2. **HTML** – Create html version for posting to the SDHC website.
   a. **Open saved html file in ‘Notepad’ application** (do not double-click file, instead right-click and select “open with” to select application)
   b. **Add code to embed a link for the SDHC icon image.**
      i. Scroll down past the header and css coding to <body>.
      ii. Find the code for the image: <img src="http://www.sandiegohistory.org/sites/default/files/sdhs_logo.jpg" />
      iii. Add bold text to the image code:
         <a href="http://www.sandiegohistory.org/enhancingaccess">
            <img src="http://www.sandiegohistory.org/sites/default/files/sdhs_logo.jpg" />
         </a>
      iv. The altered code for the image will include a link in the SDHC logo icon that will appear in the upper right of the html file screen.
      v. The URL in the bold code above can be altered to instead read http://www.sandiegohistory.org should you simply desire linking to the SDHC homepage.
   c. **Connect to SDHC’s FTP server to upload html files for SDHC website** (request SDHC FTP login/password from Jessica). You can use the free program FileZilla to connect to FTP servers/sites (FileZilla downloadable from http://filezilla-project.org/).
      i. Once connected to the FTP server, connect to the remote site at /www/sandiegohistory.org/findaid. That is the location of the folder on the FTP server where all the finding aids are housed. Upload finding aid html files from your local site to that location on the server. You can simply drag and drop files from the local to the remote site.
   d. When editing SDHC webpage, add link to finding aid html file with the following hyperlink: /findaid/ms#.html (replace "#" with the appropriate MS # for the collection). This will connect to the location of the finding aid on the FTP server discussed in previous step.

3. **EAD** – Export EAD version, this will be saved as an xml file.
   b. **To covert file for upload to OAC:**
      i. Select ‘XML’ from top menu bar
      ii. Select ‘XSL Transform’
      iii. Choose the file ‘at2oac.xsl’ (free download at https://bitbucket.org/btingle/at2oac/src)
      iv. Select ok for a new file to appear, successfully converted
      v. Add scriptencoding="iso15924" within <eadheader> (line 3)
      vi. Remove lines 15-17 which should include the following text:
         1. <p> <extref type="simple" actuate="onload" show="embed" href="http://www.sandiegohistory.org/sites/default/files/sdhs_logo.jpg" /> </p>
c. **For any collection with Series headings:**
   i. For proper placement of the “Series #:” text in the container list when listing a Series title, the `<unittid>` and `<unittitle>` lines need to be switched in the EAD before submitting to OAC. The resulting Series title line in the container list will read correctly as “Series #: Title” (instead of “Title Series #:”).

**Altering AT Stylesheets to Include ‘Uniform Title’ Subjects**

AT stylesheets lack the coding to include subject terms in the category ‘uniform titles’ when creating a PDF or HTML report. In order to include any uniform title subjects, linked to a Resource, in your PDF or HTML reports, follow these instructions:

1. Locate the stylesheets in the following folder: `C:\Program Files\Archivists Toolkit 2.0\reports\Resources`
2. The PDF stylesheet is “at_eadToPDF”
3. The HTML stylesheet is “at_eadToHTML”
4. Open each stylesheet in XML Copy Editor to edit the XML codes.
5. To edit the PDF stylesheet:
   a. After block of code for `<xsl:if test="ead:subject">`, add the following lines of code:
      
      ```xml
      <xsl:if test="ead:title">
        <fo:block font-size="12pt" space-before="18pt" space-after="18pt" font-variant="small-caps" font-weight="bold" color="#111" padding-after="8pt" padding-before="8pt">Subject Uniform Title(s)</fo:block>
        <fo:list-block margin-bottom="8pt" margin-left="8pt">
          <xsl:for-each select="ead:title">
            <li>&#8226;</li>
          </xsl:for-each>
        </fo:list-block>
      </xsl:if>
      
      ```

6. To edit the HTML stylesheet:
   a. After block of code for `<xsl:if test="ead:subject">`, add the following lines of code:
      
      ```xml
      <xsl:if test="ead:title">
        <h4>Subject Uniform Title(s)</h4>
        <ul>
          <xsl:for-each select="ead:title">
            <li><xsl:apply-templates/></li>
          </xsl:for-each>
        </ul>
      </xsl:if>
      
      ```