

Guidebook for Archivists' Toolkit

San Diego History Center

**October 2012
Version 1.1**

Archivists' Toolkit

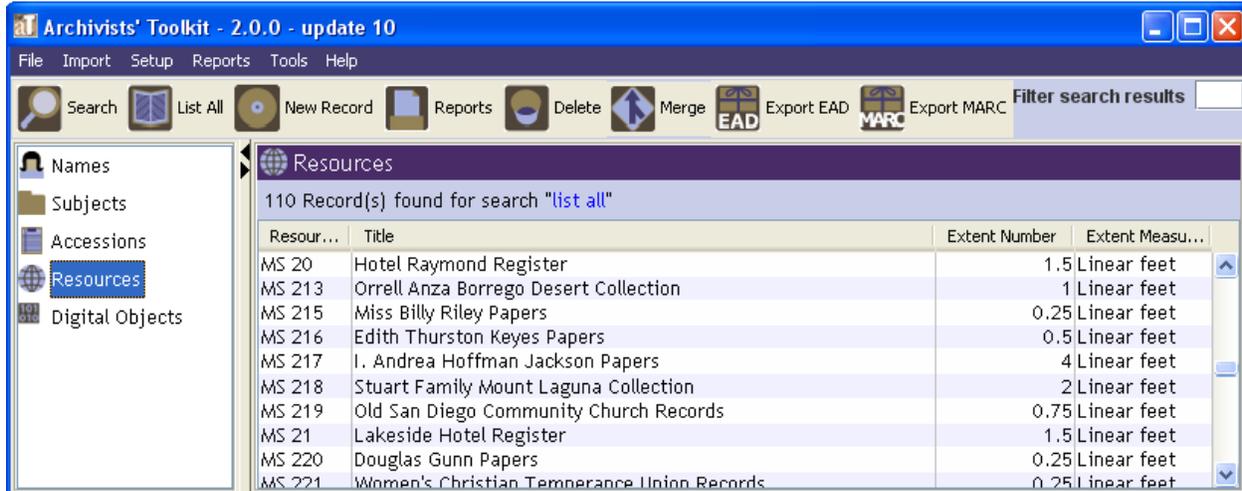
Guidelines for creating finding aids

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.

The screenshot shows the "Resources" pop-up screen. The title bar reads "Resources". The "Title:" field is empty. The screen is divided into several sections: "Basic Description", "Names & Subjects", "Notes Etc. & Deaccessions", and "Finding Aid Data". The "Basic Description" section includes fields for "Level", "Other Level", "Title", "Wrap in tag...", "Date Expression", "Inclusive Dates" (Begin, End), "Bulk Dates" (Begin, End), "Language", "Repository Processing Note", and "Repository SDHC Photo". The "Finding Aid Data" section includes "Resource Identifier" fields, "Accessions linked to this Resource ID:" (Accession Number, Accession Title), "Extent" (Extent Number, Container Summary), and "Instances" (Instance Type, Instance Label, Add Instance, Remove Instance). A "Restrictions Apply" checkbox is at the bottom. The bottom toolbar contains icons for "Add Child", "Add Sibling", "Rapid Data E...", "Delete Component", "Transfer", "Manage Locations", "Export EAD", "Export MARC", "Export Cont. Labels", "First", "Previous", "Next", "Last", "Reports", "Close", "Save", and "+ 1".

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”

The screenshot shows the 'Basic Description' tab selected. The 'Level' dropdown menu is open, displaying options: class, collection (highlighted in red), file, fonds, item, otherlevel, and recordgrp. Below the dropdown, the 'Wrap in tag...' dropdown is set to 'None'. The 'Date Expression' field is empty.

The screenshot shows the 'Basic Description' tab with 'Level' set to 'collection'. The 'Title' field contains 'Kate Sessions Collection'. Below the title, the 'Date Expression' field is set to '1876-1940'. Under 'Inclusive Dates', 'Begin' is '1876' and 'End' is '1940'. The 'Language' dropdown is set to 'English (eng)'. The 'Repository Processing Note' field is empty.

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)

The screenshot shows the 'Finding Aid Data' tab. The 'Resource Identifier' field contains 'MS 38'. Below it, there is a table for 'Accessions linked to this Resource ID:' with columns for 'Accession Number' and 'Accession Title'. The 'Extent' section shows 'Extent Number' set to '2' and 'Container Summary' set to '(3 boxes)'. The 'Instances' section is partially visible at the bottom.

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.

Basic Description				Names & Subjects				Notes Etc. & Deaccessions				Finding Aid Data			
Names															
Name	Name Link Function	Name Link Creator / Subject	Role												
Agassiz, Louis, 1807-1873	Subject														
American Forestry Association.	Source														
Arnold Arboretum.	Source														
Brandegee, Townshend Stith, 1843-1925	Subject														
Butterfield, H. M. (Harry Morton), b. ...	Subject														
California Academy of Sciences.	Source														
California School for the Blind.	Source														
California Theater.	Source														
Carroll, Alice C.	Subject														
				Edit Name Link				Add Name Link				Remove Name Link			
Subjects															
Subject															
Diaries															
Gardening															
Gibraltar, Strait of															
Gravetye Manor Gardens (England)															
Hawaii															
Horticulture															
Hudson River (N.Y. and N.J.)															
Lisbon (Portugal)															
London (England)															
				Add Subject Link				Remove Subject Link							

(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.

Resources		Name Lookup	
Filter: <input type="text"/>			
Sort Name	Name Type	Source	Rules
Abbey, Florence B.	Person	Local Sources	Describing Arch...
Adler, Sebastian	Person	Local Sources	Describing Arch...
Admiral Dewey (...)	Corporate Body	Local Sources	Describing Arch...
Admiral Farragu...	Corporate Body	Local Sources	Describing Arch...
Admiral Line.	Corporate Body	Local Sources	Describing Arch...
Admiral Peoples...	Corporate Body	Local Sources	Describing Arch...
Admiral Schley (...)	Corporate Body	Local Sources	Describing Arch...
Agassiz, Louis, ...	Person	NACO Authority ...	Describing Arch...
Aguirre family	Family	Local Sources	Describing Arch...
Double click on a Name to add it to the record. Or hit enter if a Term is highlighted.			
Function <input type="text"/>			
		Link	
		Create Name	
		Close Window	

Corporate Body	Local Sources	Describing
es ...	Corporate Body	Local Sources
/ (...)	Corporate Body	Local Sources
is ...	Corporate Body	Local Sources
ite	Corporate Body	Local Sources
el.	Corporate Body	Local Sources
F.	Corporate Body	Local Sources
ldred	Person	Local Sources
st V.	Person	Local Sources
on	Corporate Body	Local Sources

What type of name record would you like to create

Person

Person

Corporate Body

Family

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.

For “Rules,” select “Describing Archives: A Content Standard” in the drop-down menu.

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.

For “Rules,” select “Describing Archives: A Content Standard” in the drop-down menu.

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.

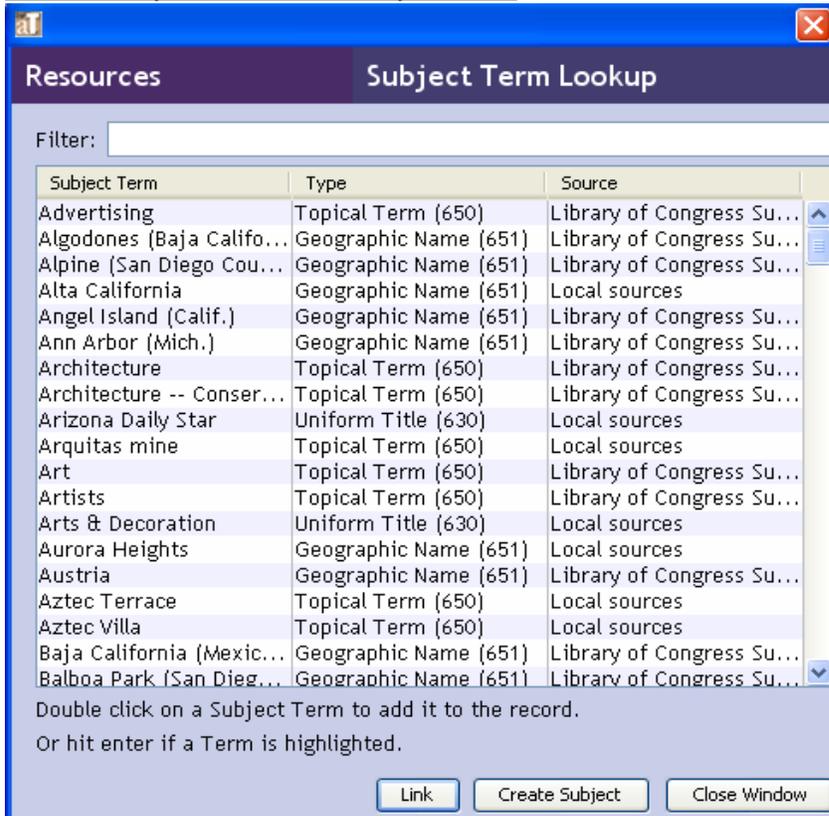
For “Rules,” select “Describing Archives: A Content Standard” in the drop-down menu.

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 “lcsch” 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

Type	Title	Content
Conditions Governing Access note	Conditions Governing Access	This collection is open for research.
Conditions Governing Use note	Conditions Governing Use	The San Diego History Center (SDHC)...
Immediate Source of Acquisition note	Immediate Source of Acquisition	Donations from multiple donors were ...
Preferred Citation note	Preferred Citation	Kate Sessions Collection, MS 38, San ...
Processing Information note	Processing Information	Collection processed by Katrina White...
Biographical/Historical note	Biographical / Historical Notes	Kate Olivia Sessions was born in San ...
Scope and Contents note	Scope and Content	This collection contains Kate Sessions...
Physical Characteristics and Technical...	Physical Characteristics and Technical...	Several pressed plant specimens have...
Arrangement note	Arrangement	The collection is arranged into five se...
Abstract		This collection focuses on the early lif...
General note	Comments	Detailed "entries of interest" have be...

Add note etc. Remove Note etc.

Deaccessions

Deaccession Date

Extent Measurement

Add Deaccession Remove Deaccession

** 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'

Resources Notes Record 10 of 11

Internal Only Persistent ID ref10

Type: Abstract

Note Label:

Note Content: This collection focuses on the early life and European travels of Kate Sessions, San Diego horticulturist and "Mother of Balboa Park." The collection contains personal diaries and correspondence, as well as scrapbooks, unpublished manuscripts and several articles on Sessions.

Wrap in tag...

First Previous Next Last Cancel OK

Created: Jul 15, 2011 by smirkin | Modified: Jul 18, 2011 by smirkin | Record Number: 290005

Biography/History → use
'Biographical/Historical note'

Resources Notes Record 6 of 11

Internal Only Multi-part Persistent ID ref6

Type Biographical/Historical note

Note Label Biographical / Historical Notes

Note Content Kate Olivia Sessions was born in San Francisco on November 8, 1857. In 1868, her family moved to a ranch in East Oakland where she grew up surrounded by nature, often riding her pony through the countryside and helping her mother in the family garden. She graduated from Oakland High School in 1875. Sessions traveled to Hawaii in 1876 to better her health and entered a San Francisco business college upon her return. In 1877, she entered the University of California at Berkeley, where she studied chemistry and also completed courses on botany, horticulture, and agriculture. Her thesis was entitled "Rock Soap: Chemical Composition,

Wrap in tag... ▾

First Previous Next Last Cancel OK

Resources Notes Record 7 of 11

Internal Only Multi-part Persistent ID ref7

Type Scope and Contents note

Note Label Scope and Content

Note Content This collection contains Kate Sessions' personal diaries and correspondence, including four diaries from her college years in San Francisco, dated 1876-1879, and several volumes of travel journals from her 1925 trip to Europe. The earlier diaries chronicle her life after graduating high school and during the first two years of college at UC Berkeley. The correspondence consists primarily of letters written during Sessions' 1925 Europe trip addressed to her close friends Mrs. Miles (first name unknown) and Alice Rainford, as well as other miscellaneous correspondence written during that period. The rest of Sessions' personal correspondence are letters written during her time in San Diego, many

Wrap in tag... ▾

First Previous Next Last Cancel OK

Scope and Content → use 'Scope and Contents note'

Arrangement → use 'Arrangement'

Resources Notes Record 9 of 11

Internal Only Multi-part Persistent ID ref8

Type Arrangement note

Note Label Arrangement

Note Content The collection is arranged into five series:

- Series I: Personal Diaries
- Series II: Correspondence
- Series III: Scrapbooks
- Series IV: Manuscripts and Articles
- Series V: Miscellanea

Wrap in tag... ▾

First Previous Next Last Cancel OK

Resources Notes Record 8 of 11

Internal Only Multi-part Persistent ID ref9

Type **Physical Characteristics and Technical Requirements note**

Note Label Physical Characteristics and Technical Requirements

Note Content Several pressed plant specimens have been separated from Sessions' diaries and individually encapsulated. The back cover to the book titled "Flowering Plants and Ferns: Cambridge Biological Series" is partly detached. The book titled "Dollikin Dutch" is very fragile. (July 11, 2011)

Wrap in tag...

First Previous Next Last Cancel OK

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.

Resources Notes Record 4 of 11

Internal Only Multi-part Persistent ID ref4

Type **Preferred Citation note**

Note Label Preferred Citation

Note Content Kate Sessions Collection, MS 38, San Diego History Center Document Collection, San Diego, CA.

Wrap in tag...

First Previous Next Last Cancel OK

Resources Notes Record 1 of 11

Internal Only Multi-part Persistent ID ref1

Type **Conditions Governing Access note**

Note Label Conditions Governing Access

Note Content This collection is open for research.

Wrap in tag...

First Previous Next Last Cancel OK

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.

The screenshot shows the 'Notes' form for 'Conditions Governing Use note'. The form is titled 'Resources Notes' and is 'Record 2 of 11'. It has a 'Persistent ID' of 'ref2'. There are two checkboxes: 'Internal Only' and 'Multi-part', both of which are unchecked. The 'Type' is set to 'Conditions Governing Use note'. The 'Note Label' is 'Conditions Governing Use'. The 'Note Content' is 'The San Diego History Center (SDHC) holds the copyright to any unpublished materials. SDHC Library regulations do apply.' There is a 'Wrap in tag...' dropdown menu. At the bottom, there are navigation buttons: 'First', 'Previous', 'Next', 'Last', 'Cancel', and 'OK'.

The screenshot shows the 'Notes' form for 'Processing Information note'. The form is titled 'Resources Notes' and is 'Record 5 of 11'. It has a 'Persistent ID' of 'ref5'. There are two checkboxes: 'Internal Only' and 'Multi-part', both of which are unchecked. The 'Type' is set to 'Processing Information note'. The 'Note Label' is 'Processing Information'. The 'Note Content' is 'Collection processed by Katrina White on July 11, 2011. Collection processed as part of grant project supported by the Council on Library and Information Resources (CLIR) with generous funding from The Andrew Mellon Foundation.' There is a 'Wrap in tag...' dropdown menu. At the bottom, there are navigation buttons: 'First', 'Previous', 'Next', 'Last', 'Cancel', and 'OK'.

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.

The screenshot shows the 'Notes' form for 'Language of Materials note'. The form is titled 'Resources Notes' and is 'Record 7 of 11'. It has a 'Persistent ID' of 'ref76'. There is one checkbox: 'Internal Only', which is unchecked. The 'Type' is set to 'Language of Materials note'. The 'Note Label' is 'Language of Materials'. The 'Note Content' is 'Collection materials are in English and Spanish.' There is a 'Wrap in tag...' dropdown menu. At the bottom, there are navigation buttons: 'First', 'Previous', 'Next', 'Last', 'Cancel', and 'OK'.

The screenshot shows the 'Notes' dialog box with the following fields and options:

- Resources** / **Notes** (Record 11 of 11)
- Internal Only Multi-part
- Persistent ID: ref77
- Type: Separated Materials note
- Note Label: Separated Materials
- Note Content: Original photographs have been separated to the Photograph Collection.
- Wrap in tag... (dropdown)
- Navigation buttons: First, Previous, Next, Last, Cancel, OK

Separated materials → use 'Separated Materials note'

Comments → use 'General Note' and type "Comments" into the Note Label box.

The screenshot shows the 'Notes' dialog box with the following fields and options:

- Resources** / **Notes** (Record 11 of 11)
- Internal Only Multi-part
- Persistent ID: ref75
- Type: General note
- Note Label: Comments
- Note Content: Detailed "entries of interest" have been included in collection inventory because no preservation copy of the diaries is available. It is hoped that these detailed notes will assist with easier access to the diaries and thus reduce the need for excess handling.
- Wrap in tag... (dropdown)
- Navigation buttons: First, Previous, Next, Last, Cancel, OK

The screenshot shows the 'Notes' dialog box with the following fields and options:

- Resources** / **Notes** (Record 3 of 11)
- Internal Only Multi-part
- Persistent ID: ref3
- Type: Immediate Source of Acquisition note
- Note Label: Immediate Source of Acquisition
- Note Content: Accession numbers 761217 and 830105A.
- Wrap in tag... (dropdown)
- Navigation buttons: First, Previous, Next, Last, Cancel, OK

Provenance/Accession → use 'Immediate Source of Acquisition note.'

(4) 'Finding Aid Data' tab

The screenshot shows the 'Finding Aid Data' tab in the Archival Toolkit. The interface includes a left-hand navigation pane with a tree view of collections, a main data entry area with multiple tabs (Basic Description, Names & Subjects, Notes Etc. & Deaccessions, Finding Aid Data), and a bottom toolbar with various actions like 'Add Child', 'Add Sibling', 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD', 'Export MARC', and 'Export Cont. Labels'. The 'Finding Aid Data' tab is active, showing fields for EAD FA Unique Identifier (ms38.xml), EAD FA Location, Finding Aid Title (Guide to the Kate Sessions Collection), Finding Aid Subtitle, Finding Aid Filing Title (Sessions (Kate) Collection), Finding Aid Date (July 11, 2011), Author (Katrina White), Description Rules (Describing Archives: ...ard (dacs)), Language of Finding Aid (Finding aid is in English.), Sponsor Note (Collection processed as part of grant project supported by the Council on Library and Information Resources (CLIR) with generous funding from The Andrew Mellon), Edition Statement, Series, Revision Date, Revision Description, Finding Aid Status (Completed), and Finding Aid Note.

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 processing/finding 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):

Resources Rapid Data Entry

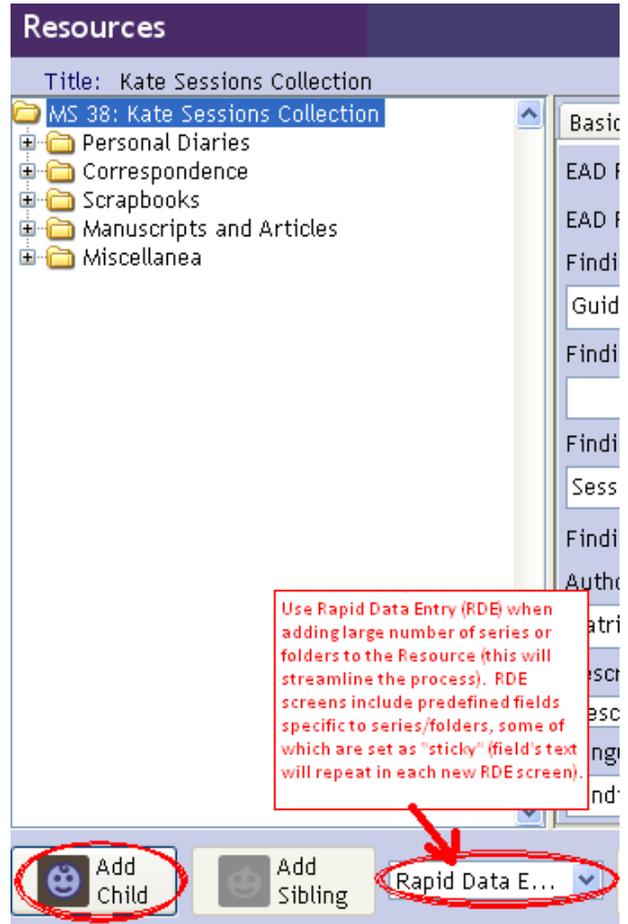
Control-click on a label to make it sticky or unsticky. Sticky fields will appear in red

Level series

Component Unique Identifier

Title

Cancel OK + 1



Resources

Title: Kate Sessions Collection

- MS 38: Kate Sessions Collection
 - Personal Diaries
 - Correspondence
 - Scrapbooks
 - Manuscripts and Articles
 - Miscellanea

Use Rapid Data Entry (RDE) when adding large number of series or folders to the Resource (this will streamline the process). RDE screens include predefined fields specific to series/folders, some of which are set as "sticky" (field's text will repeat in each new RDE screen).

Add Child Add Sibling Rapid Data E...

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

Resources Rapid Data Entry

Control-click on a label to make it sticky or unsticky. Sticky fields will appear in red

Level file

Date Expression

Inclusive Dates Begin End

Title

Instance Type

Container 1 Type Container 1 Indicator

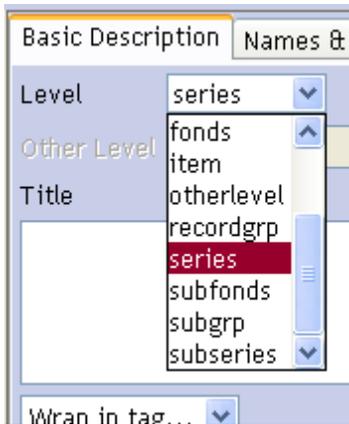
Container 2 Type Container 2 Indicator

Container 3 Type Container 3 Indicator

Container Barcode

Cancel OK + 1

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**

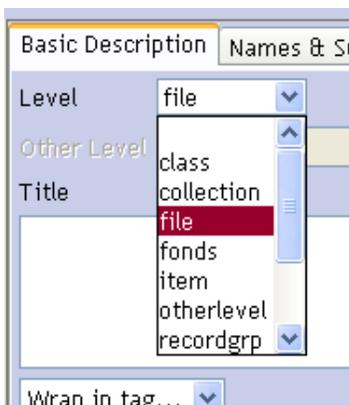
Select 'Level' as "series"

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"

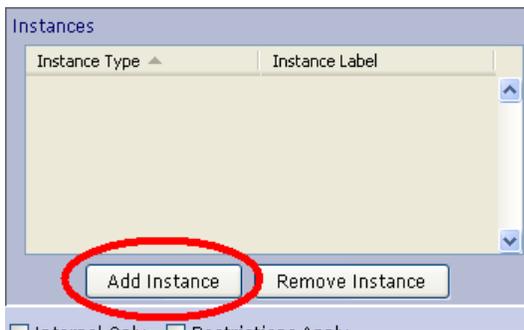
Item title → 'Title' (only capitalize first letter of first word, unless proper name, as applicable)

Item dates → 'Date expression' (enter in 'year month day' format and/or undated, as applicable)

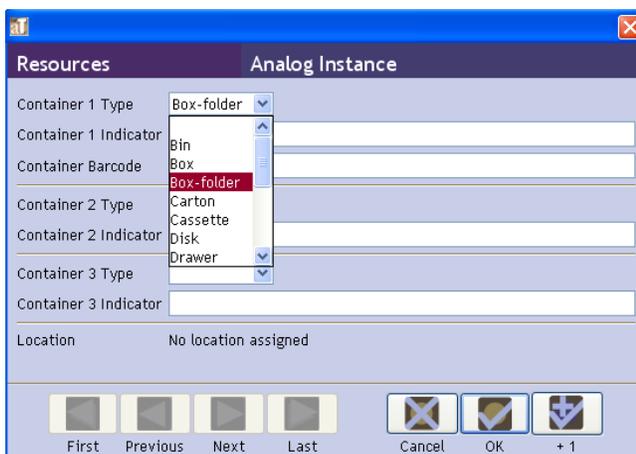
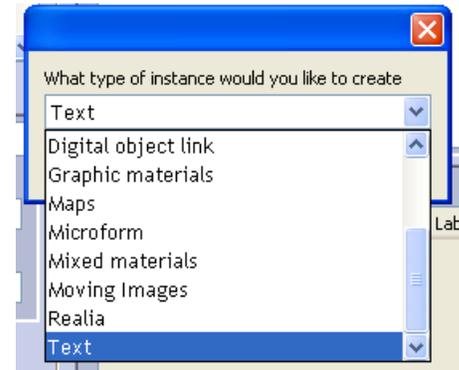
Item dates → 'Inclusive dates' (include start and end years only; do not use if 'undated')

(1b, 1c) Adding physical location of folders and items (e.g., Box #, folder #)

1) Select “Add Instance”



2) Select “Text”



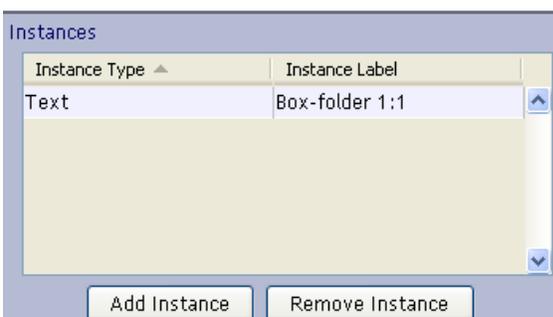
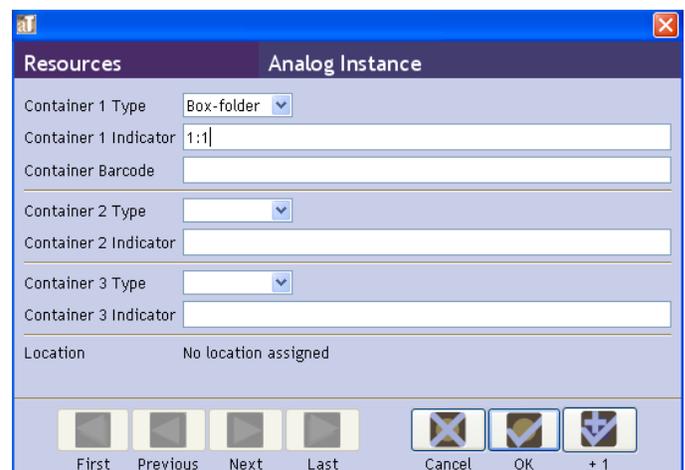
3) Choose “Container 1 Type”

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”

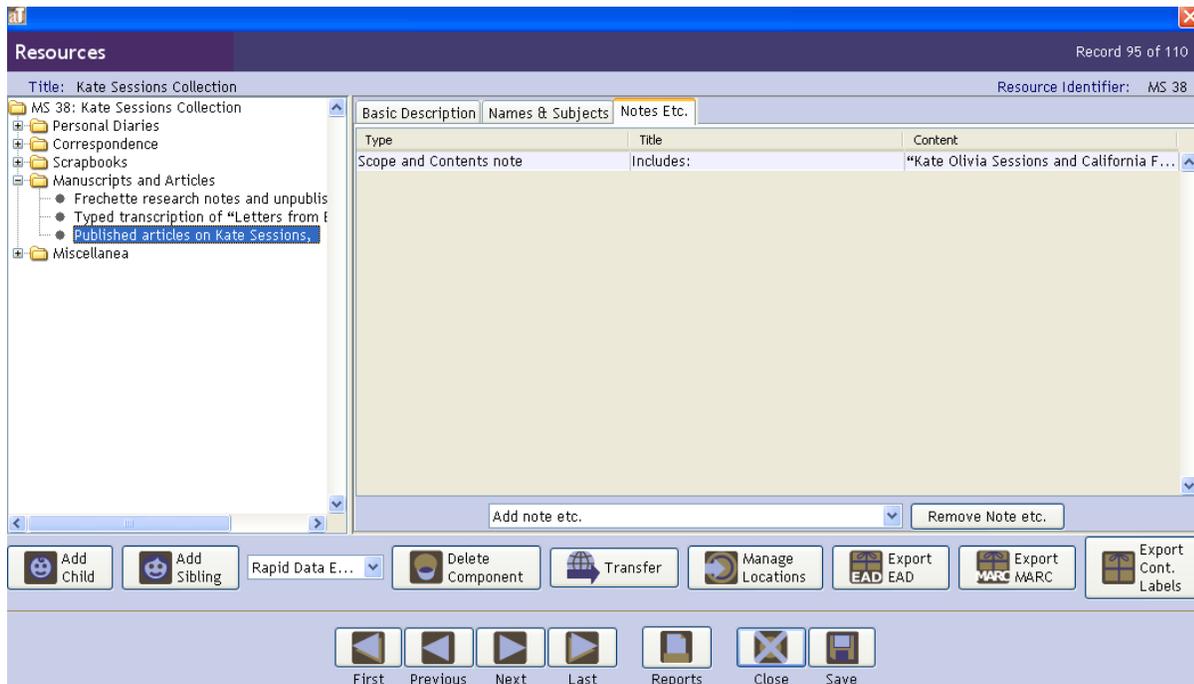
Enter “1:1” for a location of Box 1 folder 1 or “1:1-2” for Box 1 folders 1-2, etc. Select “OK”

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.



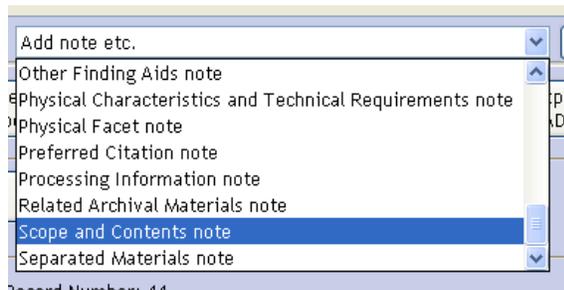
5) Once added, the newly created “instance” will be listed in the ‘Instances’ box (see example to left).

(2) 'Notes Etc.' tab (for folder or item level)



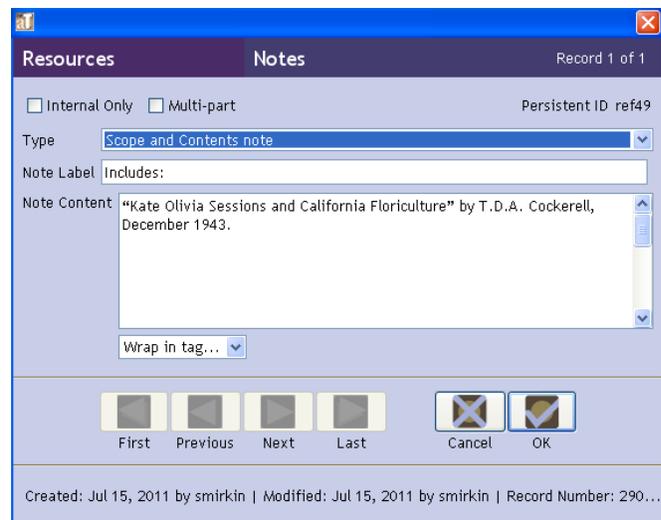
Above displays a collection (“resource record”) with five series. The fourth series, “Manuscripts and Articles,” contains three folders of which the third is highlighted in the left navigation bar. The body of the record displays the ‘Notes Etc.’ tab for the folder where additional information can be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

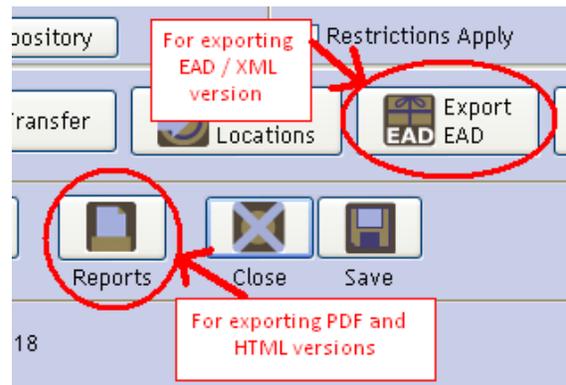


1) Select ‘Scope and Contents note’ from drop-down menu.

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.)



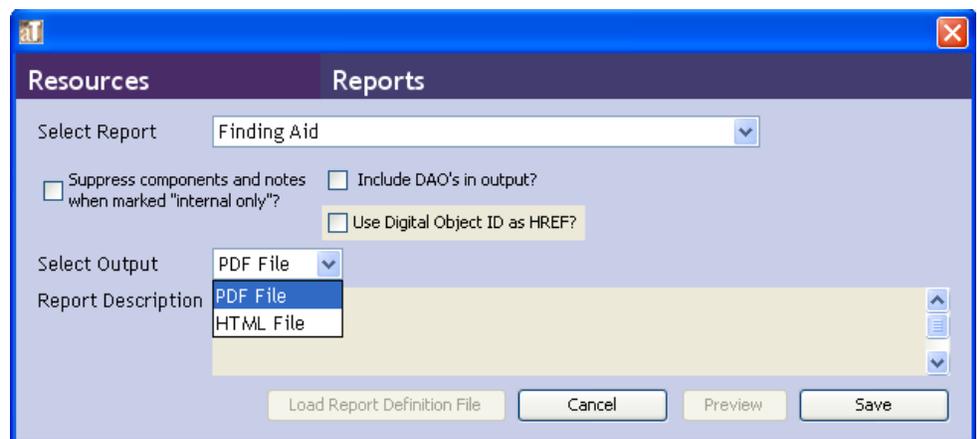
Creating PDF, HTML and EAD/XML files



PDF and HTML versions

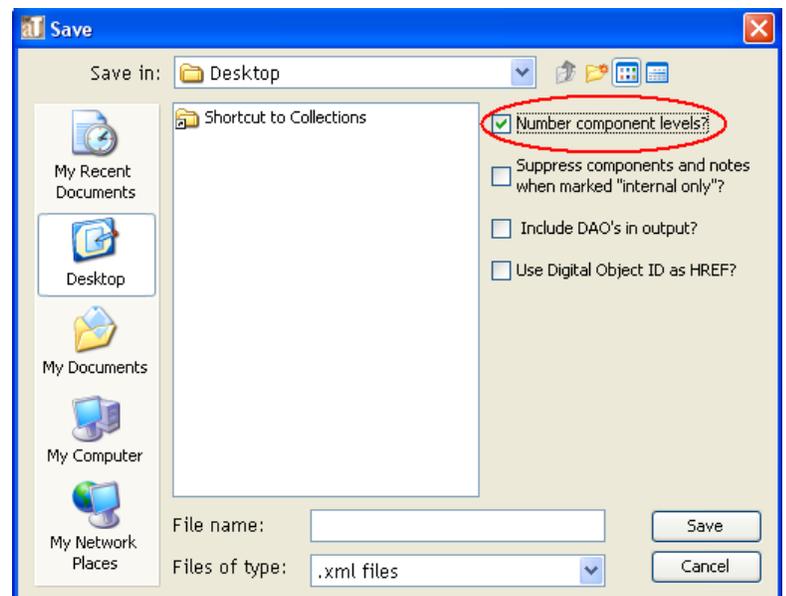
- 1) Select 'Reports'
- 2) Select "Finding Aid" from drop-down menu for 'Select Report.'
- 3) Select either "PDF File" or "HTML File" from 'Select Output' drop-down menu.
- 4) Select "Save"
- 5) Save file using the following file name formatting:

- 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”

Type	
Source	
Scope Note	Function (657) Genre / Form (655) Geographic Name (651) Occupation (656) Topical Term (650)
Accessions	Uniform Title (630)
Accession Number	

Function (657) – activity or function that generated collection materials

Genre/Form (655) – genre or format of item, medium in which presented (e.g. “diaries”)

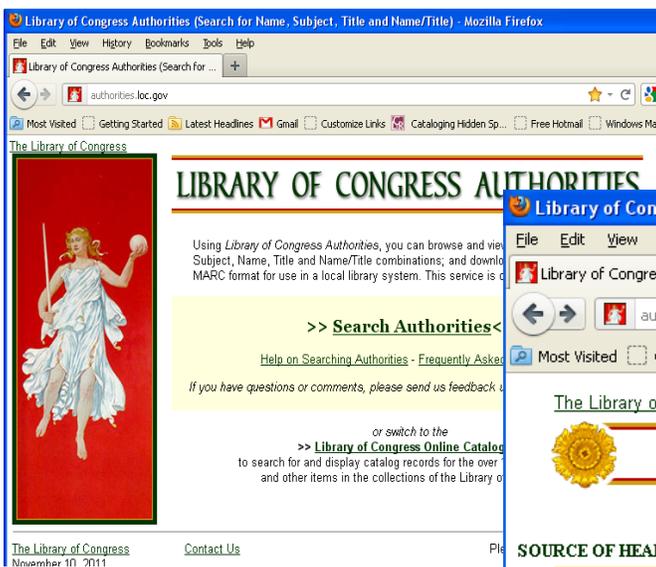
Geographic Name (651) – place, location (e.g. “San Diego (Calif.)” which is validated in Library of Congress)

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.

The Library of Congress [Library of Congress Online Catalog](#)

LIBRARY OF CONGRESS AUTHORITIES

[Help](#) [New Search](#) [Search History](#) [Headings List](#) [Start Over](#)

SOURCE OF HEADINGS: Library of Congress Online Catalog
 YOU SEARCHED: Subject Authority Headings = families
 SEARCH RESULTS: Displaying 1 through 100 of 100.

◀ Previous Next ▶

#	Bib Records	<i>select icon in first column to... View Authority Headings/References</i>	Type of Heading
1	3153	Families.	LC subject headings

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 “lcsch” (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.

Authorized Heading, References and Notes (Library of Congress Authorities) - Mozilla Firefox

Authorized Heading, References and Notes (Library of Congress Authorities) - Mozilla Firefox

Authorized Heading, References and Notes (Library of Congress Authorities) - Mozilla Firefox

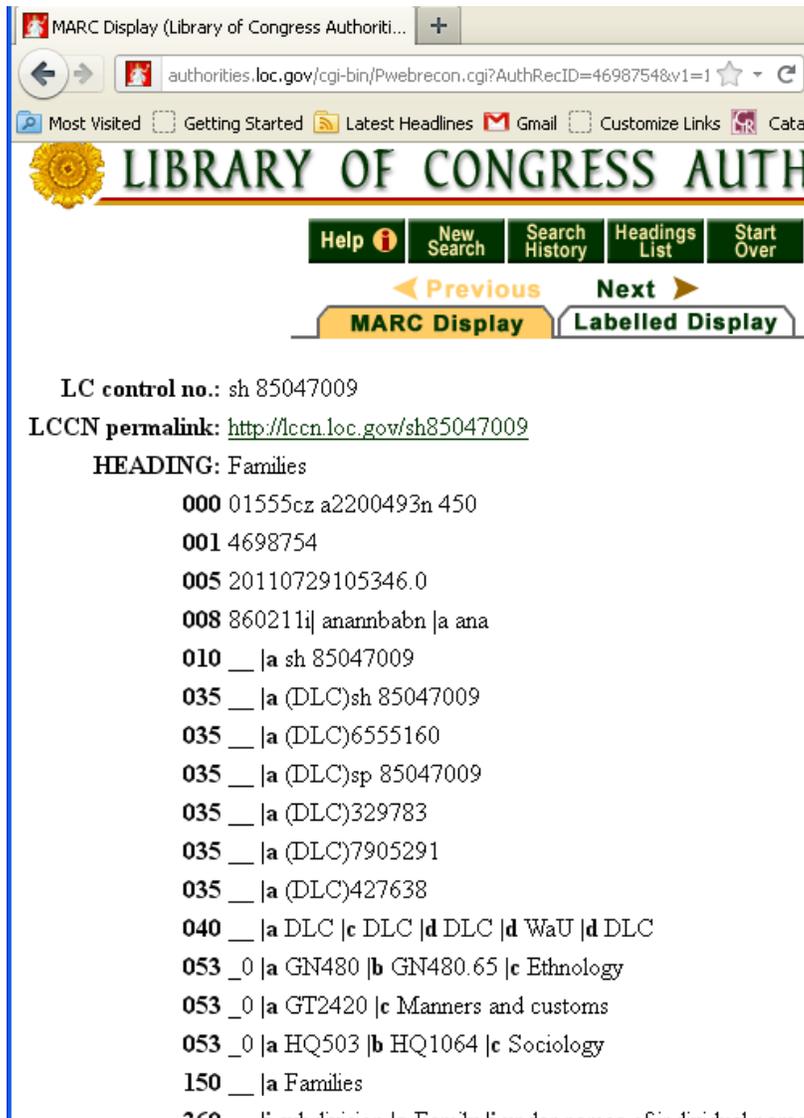
MARC Display (Library of Congress Authorities) - Mozilla Firefox

MARC Display (Library of Congress Authorities) - Mozilla Firefox

MARC Display (Library of Congress Authorities) - Mozilla Firefox

LC control no.: sh 85047009
 LCCN permalink: <http://lccn.loc.gov/sh85047009>
 HEADING: Families
 000 01555cz a2200493n 450

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.).



The screenshot shows a web browser window displaying the MARC record for the term 'Families'. The browser address bar shows the URL: authorities.loc.gov/cgi-bin/Pwebrecon.cgi?AuthRecID=4698754&v1=1. The page features the Library of Congress logo and navigation buttons for 'Help', 'New Search', 'Search History', 'Headings List', and 'Start Over'. Below these are 'Previous' and 'Next' buttons, with 'MARC Display' and 'Labelled Display' options. The main content area displays the following MARC fields:

LC control no.: sh 85047009
 LCCN permalink: <http://lccn.loc.gov/sh85047009>
 HEADING: Families
 000 01555cz a2200493n 450
 001 4698754
 005 20110729105346.0
 008 860211i| ananbabn |a ana
 010 __ |a sh 85047009
 035 __ |a (DLC)sh 85047009
 035 __ |a (DLC)6555160
 035 __ |a (DLC)sp 85047009
 035 __ |a (DLC)329783
 035 __ |a (DLC)7905291
 035 __ |a (DLC)427638
 040 __ |a DLC |c DLC |d DLC |d WaU |d DLC
 053 _0 |a GN480 |b GN480.65 |c Ethnology
 053 _0 |a GT2420 |c Manners and customs
 053 _0 |a HQ503 |b HQ1064 |c Sociology
 150 __ |a Families
 260

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 (lcs)" (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:
 - iii. Add bold text to the image code:

 - 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.
 - a. **Open saved file in XML Copy Editor** (free program available from http://xml-copy-editor.sourceforge.net/).
 - 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 **<unitid>** 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:


```
<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">
<fo:list-item>
<fo:list-item-label end-indent="24pt">
<fo:block>&#8226;</fo:block>
</fo:list-item-label>
<fo:list-item-body start-indent="24pt">
<fo:block>
<xsl:apply-templates/>
</fo:block>
</fo:list-item-body>
</fo:list-item>
</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:


```
<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>
```