

## **CLIR Annual Report: Center for Jewish History**

Included in this PDF:

- 1) Collections list
- 2) Processing guide
- 3) Collection-related blog posts:
  - <http://16thstreet.tumblr.com/post/64961891338/out-of-the-archives-war-heroism-by-kevin>
  - <http://16thstreet.tumblr.com/post/63657058958/conservation-flattening-documents>
  - <http://16thstreet.tumblr.com/post/59788701057/out-of-the-archives-when-facebook-was-an-actual>
- 4) Center for Jewish History work-report form:
  - [https://docs.google.com/spreadsheet/viewform?usp=drive\\_web&formkey=dDFMS3IHY0x0NnRCUmtnaDdEb0pWUUE6MQ#gid=0](https://docs.google.com/spreadsheet/viewform?usp=drive_web&formkey=dDFMS3IHY0x0NnRCUmtnaDdEb0pWUUE6MQ#gid=0)

### **Contact:**

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## Collections Processed on "Illuminating Collections at the Center for Jewish History"

January 31, 2012-February 1, 2014

<b>Partner</b>	<b>Collection Title</b>	<b>Linear Feet</b>
AJHS	Chicago Action for Soviet Jewry Records	45
AJHS	Leo Hershkowitz Collection of Court Records	32
AJHS	Shirley T Joseph Papers	10.3
LBI	Alexander Turney Collection	0.5
LBI	Altschuler Family Collection	1
LBI	Annemarie and Ellen Walter Collection	0.25
LBI	Arthur Abelmann Collection	2.5
LBI	Arthur and Vally Feigl Collection	0.25
LBI	Arthur Lowy Family Collection	1
LBI	Arthur Prinz Dickinson College Collection	3
LBI	Bella and Ludwig Liebman Collection	0.25
LBI	C. Theo Marx Family Collection	5
LBI	Carol Kahn Strauss Family Collection	3
LBI	Caroline Klein Collection	0.5
LBI	Edward Littman Collection of Restitution Case Files	15
LBI	Eleanor Alexander Collection	1
LBI	Elizabeth S. Plaut Collection Addenda	1
LBI	Else Herz Correspondence	1
LBI	Emery I. Gondor Collection	4
LBI	Emil Schorsch Collection Addenda	13
LBI	Ernst and Ruth Lissner Collection	0.25
LBI	Ettinger Family Collection	1
LBI	Eva Schiffer Family Collection	1.5
LBI	Florence Mendheim Collection of Anti-Semitic Propaganda	12.49
LBI	Gerald Weiss Family Collection	1.25
LBI	Gerda Dittmann Collection	2.75
LBI	Gustav Beck Collection	7.5
LBI	Hans David Blum Research Collection	6
LBI	Harold W. Fox Collection	6
LBI	Helmuth (Harry) Kahn Collection	0.25
LBI	Hirschland Bank Collection	2
LBI	Igersheimer Family Collection	0.5
LBI	Jack Ruppel Collection	1
LBI	Jewish Agricultural Settlement Corporation Collection	2
LBI	John Peters (Pinkus) Family Papers	9
LBI	Karl Rubner Collection	0.25
LBI	Kindertransport Memorial Collection	0.25
LBI	Leo Baeck Institute London Collection	39
LBI	Lilian Singer Collection	2
LBI	Martha Kirchheimer Collection	1.5
LBI	Proelsdorfer and Ledermann Family Collection	0.5
LBI	Reis Rosenberg Family Collection	0.5
LBI	Richard Koch family Collection	11
LBI	Robitscher Family Collection Addenda	0.5
LBI	Ruth Karlsruher Eisenmann Family Collection	1
LBI	Siegbert J. Weinberger Collection	1.25
LBI	Stern and Fantl Families Collection	0.25
LBI	Steven M. Lowenstein Collection Addenda	7
LBI	Steven S. Schwarzschild Collection	35
LBI	Ursula Meseritz Elgart Family Collection	1

LBI	Weinstein Karliner Collection	0.5
LBI	Werner Frank Genealogical Research Collection	21.5
LBI	Werner Warmbrunn Collection	4
LBI	Wilhelm Eckstein Collection	0.5
YIVO	Adler's Young Men Independent Association	1.04
YIVO	Al Glaser Recording Orchestra	0.5
YIVO	American Association for Jewish Education Records	2.5
YIVO	American Jewish Public Relations Society Records	0.83
YIVO	Association of Ekaterinoslav	1.5
YIVO	Balbireshker Brotherhood Benevolent Association	0.83
YIVO	Board of Higher Education of the City of New York Records	2.5
YIVO	Bronx Bakers Mutual Aid Association Records	4.04
YIVO	Chevra Bnei Rabbi Menachem Mendel Anshei Dubrowa	0.63
YIVO	Chevra Linas Azedek Anshei Yelineve	0.83
YIVO	Chevra Mogen David Anshei Brok (Brock)	0.83
YIVO	Chevra Sheares Israel Buhushe Stefanisher Klaus	0.83
YIVO	Chevra Tiferes Israel Anshei Krasilov	1.67
YIVO	Community Sons of Israel	1.5
YIVO	Congregation Beth Sholom Tomchei Harav	0.83
YIVO	Congregation Bnai Peiser Records	1.71
YIVO	Congregation Bnei Isaac Narajow	0.83
YIVO	Congregation Mogen David Anshei Chorostz	0.67
YIVO	Czernowitz Bukowinaer Lodge	0.63
YIVO	Czortkower Rabbi J. M. Schapiro Society	0.83
YIVO	Derechiner Benevolent Association	1.04
YIVO	Dzalishitzer Benevolent Association	1.77
YIVO	Ershte Novo-Ushitser Benevolent Society	0.83
YIVO	Erste Romaner KUV	1.04
YIVO	Erste Uscie Biskupiler Unt. Verein	1.29
YIVO	Erste Zabner Congregation Bnei Shulem David	0.83
YIVO	Eternal Benevolent Society	1.96
YIVO	Family Mutual Aid Society	0.42
YIVO	Finah Benevolent Association	0.63
YIVO	First Belechower Sick Benevolent Association	1.67
YIVO	First Buzeur Benevolent Association	0.83
YIVO	First Hrubishower Sick and Benevolent Society	4.08
YIVO	First Independent Weislitzer Young Mens' Sick and Benevolent Society	0.63
YIVO	First Jefferson Benevolent Society	2.75
YIVO	First Mihowa Berhometh Bucowiner K. U. V.	1.04
YIVO	First Ostrowzer Young Men's Benevolent Society	0.83
YIVO	First Pilzner Benevolent Society	0.5
YIVO	First Poltaver Brotherhood Aid Association	0.63
YIVO	First Radymnoer Congregation Bnai Mordcha Menachem	1.25
YIVO	First Roznow Galician Sick and Benevolent Society	0.83
YIVO	First Stanislauer Young Men's Benevolent Association	0.83
YIVO	First Turover Aid Society	1.25
YIVO	First Wasilkover Brotherly Aid Society	0.83
YIVO	First Wielkie Oczer Sick and Benevolent Society	1.88
YIVO	First Zaslawer Benevolent Association	0.83
YIVO	Glogower Society	0.83
YIVO	Homler Young Men's Society	0.83
YIVO	Independent Bialystoker Brotherly Love Association No. 1	0.83
YIVO	Independent Brotherhood of Yonkers	0.83

YIVO	Independent Rabbi Meyer Przemyslaner Sick and Benevolent Association	2.29
YIVO	Independent Sokolower Young Men's Benevolent Society	0.83
YIVO	Independent Webster Ladies Benevolent Society	0.83
YIVO	Irving Vigdor Lodge 502 Brith Sholom	1.25
YIVO	Isachar Widows and Orphans Benevolent Society	3.17
YIVO	Jewish American Workingmen Benevolent Society	1.04
YIVO	Jewish People's Philharmonic Chorus of Los Angeles Records	1.75
YIVO	Kalinkowitzer Progressive Aid Society	1.5
YIVO	Kittiver Sick & Benevolent Society	0.42
YIVO	Knightly Friends Association	1.33
YIVO	Koniner Young Men's Benevolent Association	2.29
YIVO	Krynicaer Young Men's Benevolent Society	3.33
YIVO	Kultchiner Independent KUV	0.83
YIVO	Lieder Brothers Benevolent Association	1.25
YIVO	Lodz Ghetto Documents	1.75
YIVO	Lodzer True Brothers Benevolent Society	0.88
YIVO	Markarover Benevolent Association	0.83
YIVO	Milgrim Fraternal Association	0.83
YIVO	National Welfare Association	0.42
YIVO	Pioneer Progressive Society	1.46
YIVO	Piotrkov Trybunalski Relief Association	1.96
YIVO	Present Tense Records	8.75
YIVO	Progressive Welfare Society AKA Progress Lodge #38 Brith Abraham	1.46
YIVO	Radautz Roumanian Benevolent Society	1.46
YIVO	Reziner Indepenent Progressive Society	1.46
YIVO	Roumanian Gomle Chesed Verein	1.88
YIVO	Sanders Association	1.29
YIVO	Societe Israelite Francaise	1.04
YIVO	Society of the Sons of the Land of Israel	0.83
YIVO	Spanish Civil War Collection	7
YIVO	Strykower Benevolent Assocation Records	0.83
YIVO	Tashrak Papers	1.08
YIVO	The Society of 1867 (Sons of Wreschen)	1.04
YIVO	True Fellowship Society	0.42
YIVO	United Friends Mutual Aid Association	2.5
YIVO	United Lutzker Men and Womens' Benevolent Society	0.83
YIVO	West End Society	1.25
YIVO	Yidisher Teater Gezelshaft in Detroit Records	0.83
YIVO	Young Friends Assocation	4.83
YIVO	Young Friends Pleasure and Benefit Society	2.92
YIVO	Young Men's Aid Society of Harlem	0.83
YIVO	Zukunft Records	8.33
YIVO	Zwanitzer Podolier Sick and Benevolent Society	1.25
	<b>Total linear feet:</b>	<b>462.21</b>

# CJH Processing Guide

## Introduction

This guide to archival processing at the Center for Jewish History describes our common practice. It is not a prescriptive manual. The materials we process belong to the partner organizations. Their opinion is final, and close communication with the partners as we process is absolutely vital.

This guide is also not intended to serve as a general introduction to archival processing. Key references that provide an introduction include Kathleen Roe's *Arranging and Describing Archives and Manuscripts*, Gregory Hunter's *Developing and Maintaining Practical Archives*, James O'Toole and Richard Cox's *Understanding Archives and Manuscripts*, and DACS. These are available in the processing lab or with the CJH archivists at YIVO. For general terminology reference, see SAA's Glossary of Archival and Records Terminology:

<http://www.archivists.org/glossary/>

The bulk of this guide pertains to processing AJHS, ASF and LBI collections (see also LBI's 2009 processing guide:

<http://digilab.cjfh.net/metadata/manual/templates/LBI-processing-guide-07-2009.doc> ), and to a lesser extent, YIVO collections. Much of YIVO processing is highly contingent on the individual collection and conversations with YIVO archivists. ASF processing has unique procedures regarding duplicates and the rehousing of material. YUM collections are not addressed in this guide.

The guide breaks down into the following ten sections:

- [1. Starting a Collection](#)
- [2. Survey and Arrangement Draft](#)
- [3. Processing](#)
  - [Software Tools](#)
  - [Preservation](#)
  - [Folders](#)
  - [Folder Titles](#)
  - [Dates](#)
  - [Formats](#)
  - [Deaccessioning and Weeding](#)
  - [Separating Materials](#)
- [4. Writing the finding aid](#)
  - [Descriptive Summary](#)
  - [Translating and Translitterating](#)

[Linear Footage Calculations](#)

[Oversized Materials](#)

[5. Encoding](#)

[6. Partner Approval](#)

[7. EAD Ingest and Records Creation](#)

[Ingesting the EAD File to DigiTool](#)

[Records Creation](#)

[8. Administrative Details](#)

[9. Completion Checklist](#)

[10. Revisions](#)

# 1. Starting a Collection

Consult with partner archivist as to which collection from the pertinent grant's collections list she or he would like you to work on. Once the partner has made a decision, enter the collection information and start date of your work into the processing work log:

<https://docs.google.com/spreadsheet/ccc?key=0AmFdXgcBJCfqdGRWOFhOb01INEdtZUw1eG40ajN3U3c#gid=0>

Examine the catalog record(s), any legacy finding aids and the partner's files on the collection (aka dossier, donor file, accession file, collection register, etc). Check the back-end of ALEPH to find suppressed records for unprocessed LBI and AJHS collections.

When removing an AJHS collection from the stacks to your desk, leave a note on the shelf indicating where the material will be (see/use the template "change of location form" in Y:\CJH\Partners\AJHS folder). When removing a YIVO collection, fill out the appropriate form.

Conduct any background research you feel is necessary to get some context for the collection. In addition to consulting the partner library and archival resources and the genealogical resources in the Genealogy Institute, this research may also include:

- ProQuest Obituaries: <http://obituaries.proquest.com/obitsweb/obits/do/home> (access CJH's subscription by going to <http://www.cjh.org/p/131>, clicking on the "Available On-Site Only" tab and then scrolling down to ProQuest Obituaries) or in the case of local personalities, the NY Times obituaries. UPDATE (11/9/12): If the previous method does not work, you can access all on-site databases by going to [http://search.cjh.org/primo\\_library/libweb/action/search.do?vid=beta](http://search.cjh.org/primo_library/libweb/action/search.do?vid=beta), clicking on "Find databases" in the top right corner, and searching or browsing to find your desired database.
- The *American Jewish Yearbook*, especially the Necrologies: <http://www.ajcarchives.org/ajcarchive/DigitalArchive.aspx>
- For biographical information on German Jews of the first and second post-war generations, search this database: <http://www.calzareth.com/aufbau/search.html>. LBI has digitized the full run of Aufbau and made it available on the Internet Archive. Also, the AJR Journal (published by the UK-based Association for Jewish Refugees) dating back to the first edition in January 1946, is digitized and full-text searchable. <http://www.ajr.org.uk/pdfjournals>
- Searching [www.archivegrid.org](http://www.archivegrid.org) to find out if other institutions hold related materials or records by the same collection creators.
- Social Security Death Index: <http://ssdi.rootsweb.ancestry.com/>
- *YIVO Encyclopedia of Jews in Eastern Europe*: <http://www.yivoencyclopedia.org/>
- *Leksikon fun der Nayer Yidisher Literatur* (Biographical Dictionary of Modern Yiddish

Literature)

- *Encyclopedia Judaica*: <http://www.jewishencyclopedia.com> [NB the 1906 version is free online, the second edition is available electronically on-site]
- Looking into how the collection has been cited (if it has been) via searches in journal databases (CJH has access to JSTOR and others through the “Available On-Site Only” tab here: <http://www.cjh.org/p/131> ), Google Scholar and Google Books. This is especially important to consider if you are potentially rearranging a cited collection.
- For help with any mysterious acronyms for Jewish organizations, check out Seymour Pomrenze’s guide to Jewish organizations’ acronyms, courtesy of Kevin. It can be found on the Center’s wiki <[http://tiki.cjh.org/tiki-download\\_file.php?fileId=243](http://tiki.cjh.org/tiki-download_file.php?fileId=243)>

### *AJHS*

In addition to the accession/donor files, consult the AJHS accession register (Tanya Elder has the latest version, and Rachel Miller has a copy of the register for all donations prior to June 2011) and check for any legacy paper finding aids which are not on-line in the blue binders between Tanya and the photocopier.

### *LBI*

Search the backend of Aleph for the MARC record of the collection. Often the 5XX fields have information about previous processing, provenance, extent, addenda, and many other interesting and relevant pieces of information.

Legacy finding aids for older LBI collections (those with AR numbers lower than 25000), if they exist, may be found in boxes in the second row of the archival stacks (ask LBI) or in the old index card file (scanned and OCRred, found on the LBI shared drive at \DigiBaeck\card\_catalog).

Hermann maintains a document called “Finding Aids Check Sheet” on the LBI shared drive at \Finding Aids\EAD\_Finding Aids. Check to see if your collection is entered, and if not enter it.

### *YIVO*

Legacy finding aids for YIVO collections can be found on the shelves behind the circulation desk in the reading room in binders or manuscript boxes. Back-ups of many of these finding aids, as well as some that are not in the reading room, can be found in the stacks off of the YIVO Archives room on 3S. Accession files are in the YIVO Archives office on the bookshelves between Gunnar Berg’s and Leo Greenbaum’s offices. Leo has the donor books in his office and he should be consulted before using them. When taking boxes from the YIVO stacks, fill out a YIVO removal notice and leave it on the shelf to indicate which boxes you have taken and where you have taken them, either to 3S or to the processing lab. A member of the YIVO Archives staff should be consulted before using any archival materials.



## 2. Survey and Arrangement Draft

The initial survey provides a basic overview of the collection. In your survey, note the type of records, prominent or frequent references to people, places, organizations (and administrative bodies therein) or topics, and the condition of records. The size and condition of the collection, as well as personal preference, will determine how long this may take, but estimate somewhere between a couple of hours and a couple of days. This survey is the beginning of an iterative process.

On the foundation of this rudimentary knowledge of the collection, a basic arrangement schema should emerge. Keeping in mind the archival principles of provenance and original order, sketch out the proposed arrangement to the series and subseries level. Use subgroups and sub-subseries sparingly. The intellectual arrangement does not have to necessarily mirror the physical arrangement.

Once you feel comfortable with your survey and arrangement draft, approach your corresponding partner archivist to discuss your findings and settle on an initial arrangement. Most of us run the arrangement drafts past the partner for every collection before we proceed with arranging and describing. Until you have processed a few collections and developed a rapport with the partner archivist, you must talk to the partner before proceeding.

The collection's final arrangement might differ substantially from your preliminary one, but it helps to have an initial drafted framework to build on and work from. As you process, certain factors important to the arrangement -- such as new insights into provenance, into the relationships between a creator's professional roles or into the administrative structure of an organization -- will become more apparent and may cause you to refine or rethink your initial conclusions.

### *AJHS / ASF*

If the collection already has a box list, has been used by researchers, and has been cited in publications, try not to physically shift the material and instead rely on intellectual arrangement if any rearrangement is necessary.

### *LBI*

If the collection has been microfilmed, the materials may not be physically rearranged.

Intellectual re-arrangement may be accomplished in the finding aid.

If a box list or prior finding aid exists, consult with LBI whether materials may be rearranged.

Collections from LBI are often personal papers, where an original order may not exist. A very common series division for these sort of collection is personal and professional.

Try to preserve the original order as much as possible.

Keep in mind that every collection will be microfilmed and digitized. Try to make the arrangement convenient for a researcher accessing these surrogates.

#### *YIVO*

All arrangement is usually based on the former arrangements of archivists and is only adjusted via close consultation with YIVO archivists.

#### ***Institutional Records vs. Personal Papers***

In the case of institutional records, determine the organizational structure as best you can, as that will inform your arrangement scheme. Often the institutional records manager, or secretary, will have created a filing arrangement already. Even if the containers are out of order, once you determine the filing arrangement you have an original order and thus a rough arrangement. An organizational structure can provide higher-level categories. When the collection is without a clear order, knowing the organization and, for example, researching minutes is vital to developing the arrangement. If the organization is still active, this is also important for processing future accruals; however keep in mind that organizations change over time and the current organizational schema might not represent how things were organized in the past and that how an organization was ordered in the past might not be how it will be organized in the future. Knowing the what, when, why, and how the organization has changed informs how you may organize these records. So remain nimble in your arrangement and be able to provide notes regarding changes.

Personal papers often arrive without an original order. In that case, consider whether the materials can be arranged by format (e.g., correspondence, vital records, photographs, etc), or by topic (Personal and Professional is a common division).

### 3. Processing

We are working on the collections very loosely following the philosophy of the basic processing approach, also known as the Greene-Meissner method or “More Product, Less Process” (MPLP) method (see the original paper that formally spawned this approach here: <http://ahc.uwyo.edu/documents/faculty/greene/papers/Greene-Meissner.pdf> ). However, many of Greene and Meissner’s recommendations apply best to 20th century institutional papers and do not always work with our collections.

As per our grant guidelines, each full-time archivist processes 2-3 linear feet per week and each part-time (20 hours/week) archivist processes at an average rate of 1-1.5 linear feet per week. We usually process at the folder-level. All partners have different processing standards and traditions. Therefore we tailor our basic processing to their specific needs, as well as to the individual collection.

As you process, take notes on significant finds which will be of potential use for your scope and content notes and historical/biographical notes later: names, places, dates, topics, languages in folders. Keep in mind that what may or may not be significant is subjective and this is where familiarity with the collections subject matter is essential; your preliminary research will help here.

This Processing section breaks down into the following:

- Software Tools
- Preservation
- Folders
- Folder Titles
- Dates
- Formats
- Deaccessioning and Weeding
- Separating Materials

#### Software Tools

Some archivists find it useful to work on the texts of their finding aids in Microsoft Word and to work on the folder lists in Excel. Some archivists who feel comfortable with manipulating tables in Word use those for the folder lists. Some archivists write everything straight into the XML editor.

Using Word for description, notes, and folder lists allows for one-stop searching and global replacements. Transferring folder lists that are in Word tables into Excel is also fairly easy.

Those archivists that choose to use Excel enjoy similar search and replacement features as well as the flexibility that spreadsheets offer. Some begin the process by creating a list of the folders found in the collection. Calling individual columns Box, Folder, Title, and Dates (fields required for the finding aid) makes this data easy to cut and paste into Oxygen in a single step. [NB YIVO does not always use box numbers, often only folder numbers that generally run through the collection.] See the Encoding section for Excel-to-XML crosswalk instructions. Other columns might include optional fields for processing, such as one for notes, preservation, etc.

### ***Excel Tricks***

You can easily create a consecutive list (for example, of folder numbers) by using the Fill command, selecting the first of a series of cells and then just using the mouse to create a box of the desired size to be filled. The Fill command can also replicate the same information (text or numeric) throughout a row or column, eliminating the need to type the same thing repeatedly.

Allow the collection and your personal preference to guide your choice of software tools.

## **Preservation**

Perform the following preservation measures while processing. Try not to return to materials later to perform any of the below, but do it as you actually handle the materials after your initial survey.

If you have any questions not answered by the below sections, please reach out to our Associate Conservator, Felicity Corkill, for guidance, and keep your partner contact apprised.

If Felicity recommends and can carry out treatment, run this past the partner archivist for approval. If you do ultimately submit a collection to Felicity for treatment, please enter it into our “Labs Tracking” Google spreadsheet:

[https://docs.google.com/spreadsheet/ccc?key=0Agez0mFhya5fdGpRSk9CSHNkbXpOeGp2b0trOXBUT3c&usp=drive\\_web#gid=1](https://docs.google.com/spreadsheet/ccc?key=0Agez0mFhya5fdGpRSk9CSHNkbXpOeGp2b0trOXBUT3c&usp=drive_web#gid=1)

### ***YIVO***

YIVO generally consults their own conservator, Tatiana Popova, on any questions regarding preservation concerns with their materials. If treatment is required beyond what Tatiana has the resources to provide, Felicity will be happy to assist.

### ***Foldering and Boxing***

Don't understuff boxes, as over time this leads to warping and curling of documents. Folders should fit snugly and there should be no visible space remaining in the boxes; if there is any space, use an acid-free buffer or spacer to fill the rest of the space. Likewise don't overstuff boxes -- it should not be a struggle to remove a folder from the box.

Fill folders fairly liberally.

#### *AJHS / ASF*

Refolder and rehouse material in new folders and manuscript boxes. Do not use banker's boxes

#### *LBI*

Use your judgement. Lean toward refolding and rehousing material in new folders and boxes.

#### *YIVO*

Generally, do not refolder or rebox unless the collection is quite small and you are requested to do so.

### ***Removal of Binders, Fasteners and Envelopes***

As a rule do not remove existing staples or clips if they do not appear to be damaging the material. Ideally, remove binders or any other covering, covers on reports, large metal fasteners, plastic sleeves, cardboard folders or boxes, and any other non-paper material. These items contain substances that are of unknown stability and can harm surrounding materials. If there is pertinent information, consider photocopying it to acid-free paper or transferring the information to the folder title or finding aid.

Use plasti-clips as sparingly as possible. Consider interleaving acid-free paper to maintain desired groupings or folding over a piece of acid-free paper to hold materials.

Discard 20th-century envelopes, unless they contain date or address information that is not available elsewhere. Use your judgment.

### ***Unfolding Documents in Folders***

Consider flattening or unfolding documents if the material requires it, from a preservation perspective, and if time allows; in the case of LBI especially this will help the digitizing or microfilming process. Use your judgment.

### ***Mold***

Mold is an occupational hazard for the archivist. Use your judgment -- if something looks or smells weird, immediately stop and think before doing anything. When in doubt, show the item to the Felicity Corkill, Associate Conservator; she is our go-to on this. Inform the partner of the

issue.

Options: photocopying, discarding if duplicates exist, treatment.

### *YIVO*

Regarding mold, YIVO consults their own conservator, Tatiana Popova. If treatment is required beyond what Tatiana has the resources to provide, Felicity will be happy to assist.

## **Folders**

Partners might require specific placements for stamps, collection titles, identification numbers, and styles of formatting.

### *AJHS / ASF*

Top left: collection title and collection number

Top center: title of the folder and dates, also place folder grouping indicators such as (1 of 2) or (3 of 5) etc. here

Top right: folder/box stamp in the top right

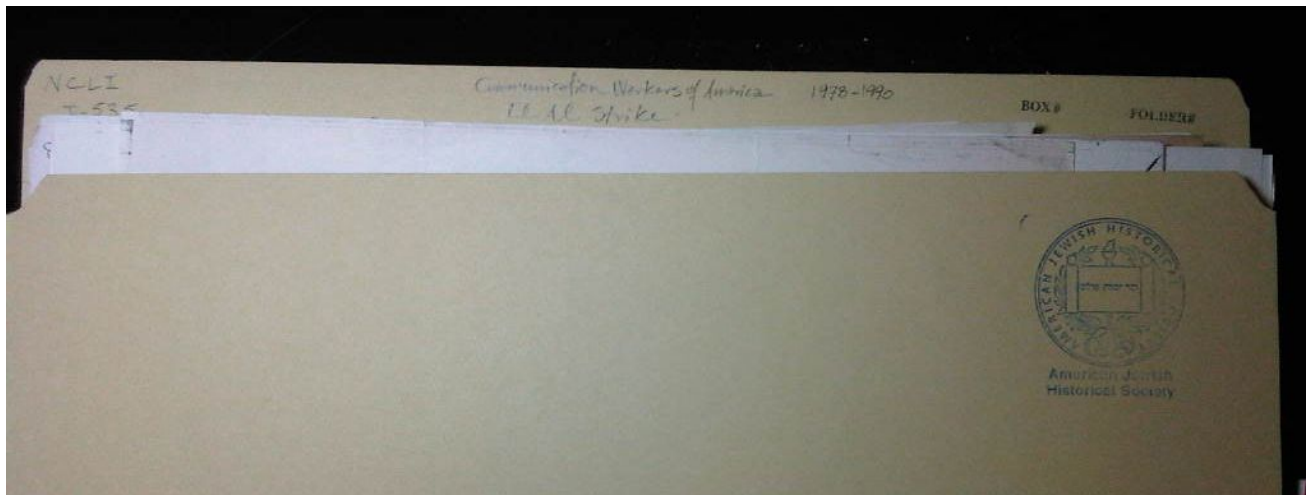
Front flap, upper right: AJHS logo stamp (ASF does not have an organizational stamp)

Example:

Isidore Meyer Papers P-905

Bradford, William (1 of 2) 1945-1975

Box: 9 Folder: 3



### *LBI*

Top left: AR number, Box number / folder number

Top center: Folder title, Date

Top right: Location

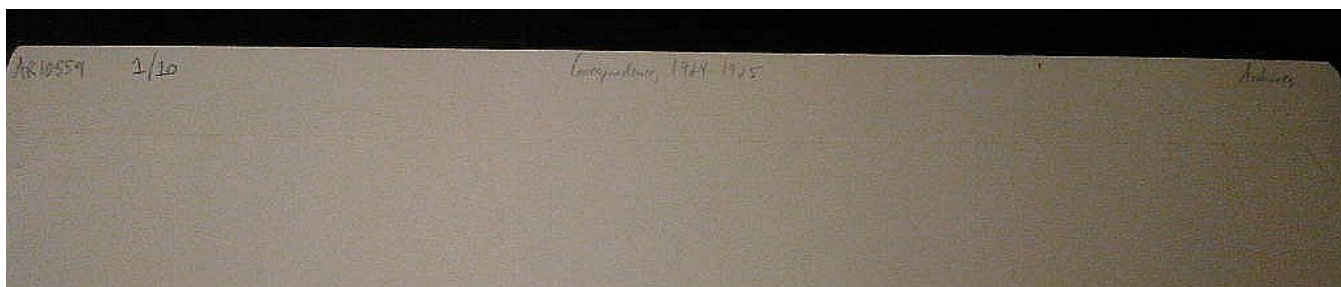
Example:

AR 25471

1/14

Family records, Undated, 1982-1989

Archives



YIVO

Usually you will not be using new folders for YIVO collections, unless the folder is crumbling and in especially bad shape. If the extant folder does not have an RG # on it, write the RG # on it. You do not have to write the collection title on the folder.

## Folder Titles

When titling folders try to stay as close to the creator's folder title (if there is a folder title, of course) as possible.

When titling folders by name, stick to the iteration of organization, place or family name that occurs on the majority of documents in the folder – if there is a majority. Or in the case of organizations, you can go with the name used on the most recent documents in the folders. Folder titles do not need to jive with any name authorities.

If your folder titles are based on place names, you might refer to the names as they appear in LC, <http://www.columbiagazetteer.org/main/Home.page>, or at YIVO, *Where Once We Walked* or JewishGen Communities Database <http://www.jewishgen.org/communities/Search.asp>. If places are known by several names, you can indicate that in parentheses, for example, L'viv (Lwow, Lemberg)

On the folder itself abbreviations will often be necessary, but as much as is possible, don't use abbreviations in the folder titles in your finding aid.

If you are unsure of folder titles early on in processing, you can hold off on writing titles onto the folders themselves, and instead document the exact wording of old folders or draft up new possibilities in your Excel/Word folder lists – and only return to write the folder titles when they are certain.

## **Dates**

Determine the date range for every folder. Do not spend time arranging items chronologically within folders. (For very small LBI collections, you might consider arranging items chronologically within folders if it does not require much effort, because this helps identify duplicates.) When arranging chronologically within a folder list, do so by start date of the folder.

For converting Hebrew years to Gregorian years use this: <http://www.hebcal.com/converter/>

### ***Undated***

Use “undated” instead of n.d. If possible, use “undated” sparingly. If the undated contents of the folder very likely fall within the date range of the dated materials, we often don’t make note of the presence of undated materials. Also, we’re more apt to use “undated” when there are a whole bunch of undated materials in the folder, not when there are just one or two items that are undated. If there are undated materials in a folder, according to DACS, undated should come before the known date range for a folder, series, etc., so the folder would read, “Correspondence, undated, 1945-1957”

### ***Date Ranges***

When determining date ranges, we don’t usually list individual years if there is only a short gap. For example, a folder with documents from 1982, 1985, 1987, and 1988 would be described as 1982-1988.

When it’s only possible to estimate the year(s), DACS is pretty flexible on this, so defer to partner practice for representing date estimates and stay consistent within your own finding aid. For an approximate range, you can use, for example, 1960s. When you have a sense of a more precise range, some of us use [1961-1964], the brackets indicating the uncertainty. When it’s likely but not absolutely certain that there’s a precise date, you can use [1961] or circa 1961.

### ***Dating Reproductions***

The dating of reproductions is an issue we’re pretty evenly split on. Some believe we should date based on the date of information creation (DACS agrees -- see the intro to DACS section 2.4); others believe we should date based on when the item itself was created (and potentially also annotated, enhanced, etc.). Whichever way you choose to go, explain in the relevant scope and content notes that either the materials dated 1793, for example, are photocopies of 1793 materials and not the originals, or explain that though the materials are dated in the 1980s, they are actually photocopies of materials from 1793.



## Formats

### ***Audio Cassettes, Film Reels, Video and CDs***

#### *AJHS / ASF*

These materials stay with the collection, in either standard folders or in appropriately sized boxes or cases. Consider creating an audiovisual series if there are tapes, film, videos or CDs in the collection. In some cases, tapes are rehoused into new cases if AJHS has the supplies. ASF supplies need to be purchased.

#### *LBI*

Remove tapes and tape cases, film, video, CDs to the LBI AV collection.

### ***Printed Materials***

In deciding whether or not printed materials should remain in a collection, consider whether or not the collection creator authored the materials, if there are annotations, and relevant to the subjects covered in the collection. When deaccessioning printed materials, we often offer them to partner libraries.

#### *AJHS*

Books are kept in the collection if they were authored by the collection creator or they have been annotated by the creator or contacts of the creator. Consult with Tanya. Newspaper clippings and other printed materials relevant to American Jewish history are often kept in the collection, but use your judgement.

#### *ASF*

Contact Randy Belinfante to discuss the handling of books found in a collection. Newspaper clippings and other printed materials are usually kept in the collection.

#### *LBI*

LBI has specific directions for printed material. Check the LBI processing guide for specific directions, but the rules are generally as follows.

Books: Copy any handwriting, dedication, or genealogical information; record title in removed books list; and provide item to LBI Library (if of German-Jewish interest, otherwise discard).

Periodicals: Copy article(s) by the collection's creator, or with annotations, or, if it is clear from context, any relevant articles. If a German-Jewish publication, check with library, otherwise discard.

Off-prints: By author, dedicated to author, or with extensive annotations -- keep in collection. Discard other off-prints.

Newspaper clippings: Keep in collection. Only photocopy if they will not survive until microfilming/digitization.

### *YIVO*

Contact a member of the YIVO Archives staff to discuss the handling of books found in a collection. Keep newspaper clippings and other printed materials in the collection.

### ***Floppy Discs and Hard Drives***

No hard and fast partner policies for these yet. Consult with partner.

### ***Oversized Materials***

If already separate from other materials, oversized items can perhaps be represented as one series -- or they can be physically separated into appropriate housing, but intellectually incorporated into their relevant series. Not all oversized materials warrant unfolding and/or rehousing -- use your judgment or ask the partner if you are uncertain.

Both AJHS and LBI house OS materials in shared boxes when there are just a few OS items from a collection, so be aware of this and consult with the partner before numbering, labeling, or titling OS folders. See "Writing the Finding Aid" for AJHS's practices on describing oversized material.

### ***Photographs and Negatives***

Photographs are ideally housed individually, described at the item level, and kept away from other items (they are complex and unstable physical artifacts, and the degradation can harm other materials). However, the ideal is not always possible. Let the collection guide your choices. Consider how many photographs there are; how important they are to the collection and how interesting their visual content; and what format they are in. Photographs remaining in collections should probably be removed from frames, binders, albums, or any housing made of material unsuitable for archives. Consult with partners first.

For general format identification, guidance on housing, and any other archival photograph questions, see Ritzenthaler and Vogt-O'Connor, *Photographs: Archival Care and Management* (copy in the archival processing lab). The Graphics Atlas website <http://www.graphicsatlas.org/> and Reilly, *Care and Identification of 19th-Century Photographs* (held by the partners and in the processing lab) are also useful.

As much as possible, negatives should be rehoused.

### *AJHS*

AJHS has a separate Photo Collection. If your collection has a Photographs series, consider

physically placing the box or folders of photos in the AJHS Photo Collection. Discuss with Tanya. However, if there are stray photos in folders, do not separate them from their folder, but consider noting “(includes photographs)” in the folder title. You can also consult with Heather Halliday, AJHS photo archivist, with questions Tanya may not be able to address.

### *ASF*

Photographs and other images in ASF collections are placed in a separate series within the collection. If you are not using photograph sleeves, interleave the images with buffer paper.

### *LBI*

In the past, LBI removed photographs and placed them in the Photograph Collection. This is no longer done, but if you are reprocessing an old collection, check Digitool (the photo collection was digitized in its entirety).

### *YIVO*

Photos are often placed together in folders or, if there are a great number or any are framed, in separate boxes within the collection. Individual photographs are left in their folders and folded in acid-free paper. Consider noting the presence of photos in a folder scope note.

As of February 2014, CJH archivists are numbering photographs in YIVO collections according to the [Numbering System for YIVO Photographs](#).

### ***Scrapbooks***

Consult with fellow archivists and partner archivists.

## **Deaccessioning and Weeding**

Run candidates for deaccession past the partner for approval. When deaccessions are substantial we note them either in “Separated Materials” field (example: <http://findingaids.cjh.org/?pID=1330418#a7> ) or as an Appendix (example: <http://findingaids.cjh.org/?pID=611930#app> ) in the finding aid.

Northern Michigan University has some helpful guidelines for what to consider weeding from institutional collections: <http://www.nmu.edu/archives/node/121>

When weeding duplicates:

### *AJHS / ASF*

Retain at most three copies of documents.

### *LBI*

Every LBI collection will ultimately be microfilmed and digitized! Therefore, no more than one copy of an item should be kept in the collection. Duplicates should be discarded.

#### *YIVO*

Keep everything. Usually there are no duplicates anyway.

## **Separating Materials**

When separating materials based on provenance, consult closely with partner. When considering separating materials based on format, consult the Formats section.

#### *AJHS*

Separation sheet, AJHS Museum collection, AJHS Photography Collection, books

#### *ASF*

Consult Randy Belinfante to discuss the handling of separated material.

#### *LBI*

Artworks and physical objects are removed and provided to Renata, who runs the LBI Art and Objects department.

Books and periodicals that relate to German-Jewish history are provided to Albina of the LBI Library. For periodicals, see rules about clippings (above).

Memoirs are removed to the Memoir collection. Check with Hermann.

AV materials are removed to the AV collection. Check with Hermann.

All separated items are noted in Separated Materials.

#### *YIVO*

YIVO generally does not separate materials from a collection. If it does, that will be noted in the accession file, and should be mentioned in the Separated Materials field of the finding aid.



## 4. Writing the finding aid

Our finding aids are structured and written in accordance with both the preferences of the partners and DACS (<http://www.archivists.org/governance/standards/dacs.asp>), which we have a print copy of in the processing lab in the basement.

Look at relevant partner's finding aids to get a sense of their individual preferences (<http://www.cjh.org/p/93>).

Examples include: LBI London Collection (<http://findingaids.cjh.org/?pID=481675>), Emery I. Gondor (1896-1977) Collection (<http://findingaids.cjh.org/?pID=1369065>)

This section breaks down into the following:

- Descriptive Summary
- Biographical/Historical Note
- Collection-level Scope and Content Note
- Arrangement
- Related Material
- Separated Material
- Access Points
- Container List

**NOTE -- Re: EAD Header Info.** Most of the information in the header (author, title, publisher, etc.) is straightforward and/or supplied by the EAD templates. But because we are working on so many different grants here, you should make sure you know which sponsor statement language to use. (When in doubt, check with Rachel Miller).

**Claims:** Described and encoded as part of the CJH Holocaust Resource Initiative, made possible by the Conference on Jewish Material Claims against Germany

**Claims II:** made possible by the Leon Levy Foundation and the Conference on Jewish Material Claims against Germany

**CLIR:** Made possible by the Cataloging Hidden Special Collections and Archives Grant from the Council on Library and Information Resources through The Andrew W. Mellon Foundation to support "Illuminating Hidden Collections at the Center for Jewish History"

**Levy:** as part of the Leon Levy Archival Processing Initiative, made possible by the Leon Levy Foundation

**Performing Arts:** as part of the Jewish Performing Arts Digital Archive Initiative

## Descriptive Summary

Creator:	[the individual or organization who created the collection, in authority format]
Title:	[collection title]
Dates:	xxxx-xxxx
Dates:	bulk xxxx-xxxx [use bulk dates only if there's a meaningful difference between when most of the materials in the collection were created and the inclusive dates]
Abstract:	[try to keep this to 3-4 sentences that do the following: briefly define the creator's roles or functions, summarize the topics that crop up, and list formats]
Languages:	[list all languages that appear – if you'd like to emphasize the primacy of certain languages over others, you could write something like, "This collection is in German and English, with a few items in x, y and z."]
Quantity:	x linear feet (x manuscript boxes, x half-manuscript boxes, x oversized folders) [see upcoming section on "Linear Footage Calculation"; also see upcoming section on "Oversized Materials"]
Identification:	[collection number]

## Biographical/Historical Note

Try to concentrate on the biographical or historical information that is supported by the materials found in the collection. For instance, if an individual won a Nobel Prize but there are few documents in the collection dealing with this fact, one should not dwell on the subject for too long.

For confirming otherwise uncertain birth/death dates of collection creators or family members who may have had SSNs, the Social Security Death Index can be helpful:

<http://ssdi.rootsweb.ancestry.com/>

Also helpful is <http://www.ancestrylibrary.com/default.aspx> and <http://obituaries.proquest.com/obitsweb/obits/do/home> (access CJH's subscriptions to these resources by entering into them here: <http://www.cjh.org/p/131> ). For German-Jews, the Aufbau index is invaluable <<http://www.calzareth.com/aufbau/search.html>> .

When biographical information is scant for collections, consider contacting the creator/donor if

still living for biographical details.

You may include footnotes or references for Historical/Biographical Note in order to refer to specific folders in the collection you consulted or to outside sources. Use when it seems necessary.

## Collection-level Scope and Content Notes

Provide a broad view of the collection here. List the topics, formats and individuals most represented. Leave smaller details for the series-level scope and content notes.

You can also note the following: important provenance information that assists in understanding the contents of the collection; how certain topics cut across various series; important gaps, things that a researcher might expect to find in the collection, but won't; small summaries of the individual series....

Try not to repeat information that you cover elsewhere.

...

Rachel Miller generated a little Archivist's Thesaurus in Google Docs that may be of interest when composing scope and content notes, if you ever find yourself struggling to make the language a little more varied. New content is always welcome:

[https://docs.google.com/spreadsheet/ccc?key=0AmFdXgcBJCfqdGRSQXNWb2M3NIRwQWlmWENuWEZtVnc&hl=en\\_US#gid=0](https://docs.google.com/spreadsheet/ccc?key=0AmFdXgcBJCfqdGRSQXNWb2M3NIRwQWlmWENuWEZtVnc&hl=en_US#gid=0)

### ***Collections that have no series (or are as a whole the equivalent of one series)***

If your collection is the equivalent of one series, that is, you have not arranged it into multiple series, then you do not need to add a series-level scope and content note to the finding aid. The collection-level scope and content note will suffice. See "Collections that have no series" under [Encoding](#) section of this processing guide for details on how to encode the container list in this case.

## Arrangement

At the top of your arrangement outline, you can note why the series are arranged as they are – for reasons of provenance, previous processing, or of placing professional before personal, etc.

## Related Material



Usually we focus on related archival collections belonging to the partners. We also look especially at the American Jewish Archives and other Jewish archives holdings. Any collection strongly related by provenance to the creator should definitely be listed here – for example, if AJHS holds half of one individual’s collection and NYU holds the other half, note NYU’s collection. The New School records were removed to SUNY Albany many years ago (long story), and as many German-Jews taught there, often contains related material: “The German and Jewish Intellectual Emigre Collection” <<http://library.albany.edu/speccoll/emigre.htm>> . Link out to the finding aids or catalog records for these related collections if possible.

To link to a related finding aid at the center in your EAD finding aid, use the address from the work log (<http://digital.cjh.org/webclient/DeliveryManager?pid=>) plus the desired collection’s pid after the = sign.

Linking to an Aleph record (aka the OPAC) can be done by the following formula:  
[http://67.111.179.150:80/F/?func=direct&doc\\_number=000126326](http://67.111.179.150:80/F/?func=direct&doc_number=000126326) – with the last 6 digits (in red) being the specific Aleph record number. (If you don’t know how to find this number from the catalog description in the OPAC front-end, click on the “Abbreviated View” link at the top of the record and it will give you the 9-digit “system number.”)

Linking to an entry in the YIVO Archives site (via Archon) is also possible, though we usually prefer to link to our CJH resources. The root URL is:  
<http://www.yivoarchives.org/index.php?p=collections/controlcard&id=33362> with the digits in red referring to the specific record. You can find this number only by looking in the address bar of the web browser. If you’ve gotten to the record from a search, there will usually be some kind of other junk after the record number (id=**33362**&q=meir+melman, for example) which you can delete.

Linking to static Primo records (search.cjh.org) in an attractive way is something we’re still trying to figure out with ExLibris. Ssee below for directions from Jen Palmisano’s 9/28/2012 email regarding this topic, and below for a previous error:

*For a “search query” result try this:*

[http://search.cjh.org/primo\\_library/libweb/action/dlSearch.do?institution=CJH&onCampus=false&query=any,contains,jewish&dym=true&highlight=true&lang=eng&vid=beta](http://search.cjh.org/primo_library/libweb/action/dlSearch.do?institution=CJH&onCampus=false&query=any,contains,jewish&dym=true&highlight=true&lang=eng&vid=beta)

*You can change the part that says ‘jewish’ to be whatever your search terms are. So that middle syntax should be **query=any,contains,[search term]**. Remember that there can’t be any spaces, so if there are spaces in your terms use an underscore (\_).*

*For instance,*

[http://search.cjh.org/primo\\_library/libweb/action/dlSearch.do?institution=CJH&onCampus=false&query=any,contains,jennifer\\_palmisano&dym=true&highlight=true&lang=eng&vid=beta](http://search.cjh.org/primo_library/libweb/action/dlSearch.do?institution=CJH&onCampus=false&query=any,contains,jennifer_palmisano&dym=true&highlight=true&lang=eng&vid=beta)

*Here is an example of the persistent link in Primo:*

[http://search.cjh.org/primo\\_library/libweb/action/diDisplay.do?docId=CJH\\_ALEPH000009780&vid=beta](http://search.cjh.org/primo_library/libweb/action/diDisplay.do?docId=CJH_ALEPH000009780&vid=beta)

With CJH\_ALEPH + nine digit SYS ID.\*

\*Note: this will give you a weird-looking result.

But if something is only in DigiTool, it's number will look like this:

[http://search.cjh.org/primo\\_library/libweb/action/diDisplay.do?docId=cjh\\_digitool1380797&vid=beta](http://search.cjh.org/primo_library/libweb/action/diDisplay.do?docId=cjh_digitool1380797&vid=beta)

With cjh\_digitool + the PID.

The part you want to change is the doc ID at the end. You can get this from the URL for any record. Through the course of a normal search, you want to look in the URL for the docId or recId. For Aleph records this will always start with CJH\_ALEPH, then the nine digits of the call number. For DigiTool records, this gets more complex, because most DigiTool records also have an Aleph record, so in Primo they have been merged together. This means that it will have a dedupmrg number instead (de-dup manager ID).

[http://search.cjh.org/primo\\_library/libweb/action/diDisplay.do?docId=dedupmrg25174425&vid=beta](http://search.cjh.org/primo_library/libweb/action/diDisplay.do?docId=dedupmrg25174425&vid=beta)

In this case the item has an Aleph and DigiTool record, and they have been merged together in Primo.

For EMu, the prefix is more complex:

[http://search.cjh.org/primo\\_library/libweb/action/diDisplay.do?docId=cjh\\_emuEMu.Cjh.catalogue.irn.15026](http://search.cjh.org/primo_library/libweb/action/diDisplay.do?docId=cjh_emuEMu.Cjh.catalogue.irn.15026)

With cjh\_emuEMu.Cjh.catalogue.irn. + IRN from EMu. This also refers to the EMu module that the record was harvested from.

(Previously the links referred to in Jen's email above linked to a Primo test site, but by adding &vid=beta to the end of the URL, the link goes to the correct site)

This table summarizes our link formulas; note that they are not XML-escaped. to create XML compliant links, search for "&" and replace with "&";

URL directly to the finding aid using PID	<a href="http://digital.cjh.org/webclient/DeliveryManager?pid=882607">http://digital.cjh.org/webclient/DeliveryManager?pid=882607</a>
	<a href="http://digifindingaids.cjh.org/?pID=109142">http://digifindingaids.cjh.org/?pID=109142</a>
	<a href="http://findingaids.cjh.org/?pID=109142">http://findingaids.cjh.org/?pID=109142</a>
URL to the Access.cjh.org record using PID	<a href="http://digital.cjh.org/R/?func=dbin-jump-full&amp;object_id=109142">http://digital.cjh.org/R/?func=dbin-jump-full&amp;object_id=109142</a>

	<a href="http://access.cjh.org/109142">http://access.cjh.org/109142</a>
Direct link to any digital object (including finding aids) inside Digitool viewer using PID (not encouraged for finding aids)	<a href="http://digital.cjh.org/1368460">http://digital.cjh.org/1368460</a>
Link to Aleph record using Aleph sysid number (replace hashes)	<a href="http://opac.cjh.org:8991/F?func=direct-doc-set&amp;doc_number=000#####&amp;format=999">http://opac.cjh.org:8991/F?func=direct-doc-set&amp;doc_number=000#####&amp;format=999</a>
Link to request section of Aleph record using Aleph sysid number	<a href="http://opac.cjh.org:8991/F?func=item-global&amp;doc_library=CJH01&amp;doc_number=000186740">http://opac.cjh.org:8991/F?func=item-global&amp;doc_library=CJH01&amp;doc_number=000186740</a>
Link to Primo record using Aleph sysid number (for records existing <i>ONLY</i> in Aleph)	<a href="http://search.cjh.org/primo_library/libweb/action/dlDisplay.do?docId=CJH_ALEPH000009780&amp;vid=beta">http://search.cjh.org/primo_library/libweb/action/dlDisplay.do?docId=CJH_ALEPH000009780&amp;vid=beta</a>
Link to Primo record using PID (for records <i>ONLY</i> existing in Digitool)	<a href="http://search.cjh.org/primo_library/libweb/action/dlDisplay.do?docId=cjh_digitool1380797&amp;vid=beta">http://search.cjh.org/primo_library/libweb/action/dlDisplay.do?docId=cjh_digitool1380797&amp;vid=beta</a>
Link to Primo record using dedupe manager number (for records existing in <i>BOTH</i> Digitool and Aleph, e.g. MARC records for finding aids). This number can be found in the item's Primo URL	<a href="http://search.cjh.org/primo_library/libweb/action/dlDisplay.do?docId=dedupmrg25174425&amp;vid=beta">http://search.cjh.org/primo_library/libweb/action/dlDisplay.do?docId=dedupmrg25174425&amp;vid=beta</a>
Any LBI item which has multiple photographs with separate Digitool records by dropping in the AR call number from the 094 field.	<a href="http://digital.cjh.org/R/?func=search-advanced-go&amp;file_format_code=WEX&amp;LOCAL_BASE=GEN01&amp;mode=1&amp;find_code1=PAC&amp;request1=AR-5605&amp;find_operator=AND&amp;find_code2=WTY&amp;request2=photographs&amp;find_operator2=AND&amp;find_code3=WRD&amp;request3=&amp;adjacent=Y&amp;media_type=ALL&amp;selected_otype=&amp;selected_tag=0">http://digital.cjh.org/R/?func=search-advanced-go&amp;file_format_code=WEX&amp;LOCAL_BASE=GEN01&amp;mode=1&amp;find_code1=PAC&amp;request1=AR-5605&amp;find_operator=AND&amp;find_code2=WTY&amp;request2=photographs&amp;find_operator2=AND&amp;find_code3=WRD&amp;request3=&amp;adjacent=Y&amp;media_type=ALL&amp;selected_otype=&amp;selected_tag=0</a>
To show the PNX record for any Primo record, add the following string to the end of the Primo record URL	&showPnx=true
Link to a Primo search for a string of text, in this case Judaism	<a href="http://search.cjh.org/primo_library/libweb/action/dlSearch.do?institution=CJH&amp;onCampus=falso&amp;query=any,contains,%22Judaism%22&amp;dym=true&amp;highlight=true&amp;lang=eng&amp;vid=beta">http://search.cjh.org/primo_library/libweb/action/dlSearch.do?institution=CJH&amp;onCampus=falso&amp;query=any,contains,%22Judaism%22&amp;dym=true&amp;highlight=true&amp;lang=eng&amp;vid=beta</a>
To show the OAI record for a digital object, place the Digitool PID at the end of this link. Replace “marc21” with “oai_dc” to see the DC record	<a href="http://digital.cjh.org/OAI-PUB?verb=GetRecord&amp;metadataPrefix=marc21&amp;identifier=oai:digital.cjh.org:1633205">http://digital.cjh.org/OAI-PUB?verb=GetRecord&amp;metadataPrefix=marc21&amp;identifier=oai:digital.cjh.org:1633205</a>

## Separated Material

When separating materials based on provenance, mention this in the finding aid. However, if some errant box ended up on the shelf amidst the collection and it was a mere error of placement, don't note this here.

## **Acquisition Information**

Note from whom and when the repository acquired the materials and the custodial history before that, if known.

*LBI*

LBI's stylesheet suppresses this information from public view.

## **Processing Information**

If you like, note any important information about your processing of the collection, and also about the history of the processing of this particular collection. This is a matter of personal preference, but consider describing your "archival intervention," so that future researchers and archivists understand what you did and why. For example, if reprocessing a previously processed collection, explain what changes were made and why.

## **Access Points**

We assign access points in five categories: Individuals, Organizations, Subjects, Places, and Document types. These access points will serve as the subject headings in the MARC record.

Try to use access points with authority file numbers. Local headings are fine, but use sparingly if possible.

If possible, limit the number of access points for each type of access point to a handful. Too many access points may not be useful to a researcher.

Search around the CJH catalog to see what kind of subject headings have been assigned to related books or other materials.

*LBI*

MARC records exist for every collection. See if the initially assigned subjects fit. However, be aware that these MARC records were often created after a very brief survey, so the subjects may be incorrect or incomplete.

Very common subject headings include:

United States -- Emigration and immigration -- 1933-1945  
Restitution and indemnification claims (1933- )

*AJHS*

If a MARC record already exists for the collection, consider using some of the assigned subjects.

***Individuals***

For organization names, use the Library of Congress Name Authorities (LCNAF):  
<http://authorities.loc.gov/> or <http://id.loc.gov/>

An alternative international source for names: <http://viaf.org/>

Only add access points for those individuals with the most representation in the collection – first and foremost the creator. We tend not to add access points for well-known figures who only have a few letters in the collection (instead you can call attention to the presence of such letters either by devoting a folder title to the individual or mentioning her/him in the scope and content notes).

***Organizations***

Use the Library of Congress Name Authorities (LCNAF): <http://authorities.loc.gov/> or <http://id.loc.gov/>

***Subjects***

Use Library of Congress Subject Headings (LCSH): <http://authorities.loc.gov/> or <http://id.loc.gov/>

***Places***

Use Library of Congress Name Authorities (LCNAF): <http://authorities.loc.gov/>

*YIVO*

Also use *Where Once We Walked* if a place important to the collection does not have a LCNAF

***Document types***

Use the Getty Art and Architecture Thesaurus (AAT):  
<http://www.getty.edu/research/tools/vocabularies/aat/index.html>

The ANTC's Authorities Subcommittee is now building a genre-form authorities list for use across partners, which we will look to in the future. Their current work is visible here:

## Container List

### *Folder Titles*

Most of us do not use italics in our folder titles to delineate publication titles or the like, and DACS prescribes not using italics. However, in an ideal world, AJHS would prefer the use of italics for publication titles -- whether or not you do this is up to your discretion.

### *Dates*

For more on dates at the folder level, see “Folder Treatment and Description” in the Processing section.

## Translating and Transliterating

### *YIVO*

YIVO collections often have materials in multiple languages, so consultation with YIVO staff for specific questions and any idiosyncratic issues is strongly recommended. For Yiddish and Hebrew individuals’ and organizations’ names, place names and publication titles, use the spelling found in the folder or the most common transliteration for well-known people and organizations. If there is no transliteration for personal names within the folder, use the index in the *Guide to the YIVO Archives*. If the name is not found in the *Guide*, use YIVO transliteration standards, which can be found in the Weinreich dictionary. Use the Library of Congress entries for access points only, not for folder titles or notes. For non-Yiddish organizations’ names, place names and publication titles, translate and transliterate, if necessary, putting the translation in parentheses. For place names, use the current spelling followed by the standard Yiddish spelling in parentheses. For example, Brzesc (Brisk) or Lviv (Lwow, Lemberg).

### *LBI*

A majority of LBI’s material is in German. For important organizations and titles in the descriptive text, consider providing the German in italics, followed by the English translations in parentheses. Whatever you do, be consistent.

## Linear Footage Calculations

For AJHS and LBI a manuscript box counts as 0.5 linear feet and a half-manuscript box counts as 0.25 linear feet.

*AJHS / ASF*

For oddly shaped boxes, consult the below table:

<b>Length of Box</b>	<b>Code used in Collection Lists</b>	<b>Linear Feet</b>
3.5 inches	PB (publications)	.27 lin.ft.
4.5 inches	LS (Lantern Slide)	.4 lin.ft.
5.5 inches	SB1	.5 lin.ft.
6.75 inches	Card File	.6 lin.ft.
8.25 inches	SB2	.7 lin.ft.
9.5 inches	SB3	.8 lin.ft.
11.5 inches	OS4	1 lin.ft.
16 inches	OS5	1.3 lin.ft.
17.5 inches	OS3	1.5 lin.ft.
20.5 inches	OS1	1.7 lin.ft.
24.5 inches	OS2	2 lin.ft.
31.5 inches	OS6	2.6 lin.ft.
13.5 inches	OS7	1.1 lin.ft.

*YIVO*

YIVO calculates in precise feet and inches. Manuscript boxes are 5 inches, half-manuscript

boxes are 2.5 inches, and flat boxes are 3 inches.

## **Oversized Materials**

Note the presence of oversized material in the descriptive summary under extent. Also note it in the relevant series and box/folder list.

### *AJHS*

AJHS uses the following codes for OS materials:

OS1  
OS2  
OS1F  
OS2F  
MAP-1

OS1 and OS2 refers to a boxes; OS1F and OS2F refer to folders. See the table in the “Linear Footage Calculations” section above for sizes of these items. MAP-1 is usually only a folder, so no need to make a distinction between folder or box. OS1 and OS2 stay on the 5th floor. MAP-1 files are huge and go into the Map drawers on the 9th floor.

When there is only a small amount of oversized material which will be going into AJHS’s shared oversized boxes, in the container list column normally used for box write OS1F or OS2F, which will indicate to AJHS that the material is in the shared folders. Each OS folder gets a number, 1 of 1, 1 of 2, 2 of 3, etc. on its label. In the container list column normally used for folder, write 1, 2, etc. – whatever the number of the folder is.

If you have enough oversized material to warrant an entire box, then number the box within the range of all your boxes (so if it’s the last box of your collection, call it 29 of 29, for example), and indicate that a box is oversized in its relevant series.

If you don't have enough oversized material to warrant an entire box, then it will go in a shared folder. Barcode and label the shared folder with the collection title, collection dates, collection number and the material type is noted as OS1F - Shared.

Example:

<http://findingaids.cjh.org/?pID=546184>

### *LBI*



LBI places OS folders from multiple collections in a single box, until the box is full. When done processing, check with LBI (Hermann) to determine the current OS box number.

**NOTE:** if there is an oversized component, it is especially important to be sure to include the printed finding aid in the collection, for the purpose of microfilming... otherwise OS items get separated or forgotten.

## 5. Encoding

Information about EAD encoding was previously found in the Center's EAD manual, available at <http://ead.cjh.org/> (password and username required). However, that EAD Manual was created in 2005 and was no longer maintained by CJH staff as of 2012. While recommendations for EAD encoding were still valid, workflow-related recommendations were outdated since they related to an NHPRC-funded project that was completed years ago, and the site was deleted as of May, 2013.

The EAD Subcommittee transferred the relevant contents of *ead.cjh.org* to the CJH staff wiki (<http://tiki.cjh.org/tiki-index.php?page=Encoded%20Archival%20Description>) and is working on revising and formatting this content. (Note: Wiki is password-protected and staff must have individual log-in profiles.) This documentation in this processing guide is therefore not thorough, but addresses a few issues specific to our workflow.

### **oXygen**

Currently we encode using oXygen XML Editor, a guide to which can be found here: [http://www.archivists.org/saagroups/ead/tools\\_and\\_helper\\_files/oxygen/OxygenInstructions\\_MH\\_S.doc](http://www.archivists.org/saagroups/ead/tools_and_helper_files/oxygen/OxygenInstructions_MH_S.doc)

### **Configuring the Transformation Scenario in oXygen**

Click on “Configure transformation scenario” icon. To add a new scenario click on “edit” and fill in the following under the XSLT tab:

Name: [any name you wish to use. for example: AJHS\_EAD2HTML]

XML URL: `#{currentFileURL}`

XSL URL: <http://digital.cjh.org/xsl/ajhs2010.xsl> [or replace “ajhs” with other partner acronyms]

Don't use stylesheet declaration

Transformer: Saxon 6.5.5

Under the FO Processor tab, nothing should be checked off.

Under the Output tab:

Save as: `#{cfn}.html`

Check open in browser and save file

### **oXygen tricks**

Ctrl-shift-P – to transform long XML text into more readable paragraphs

### **Stylesheets (aka XSLT or XSL)**

The partners each have their own stylesheets for the upper portion of their finding aids, which are viewable here:

<http://digital.cjh.org/xsl/ajhs2010.xsl>

<http://digital.cjh.org/xsl/lbi2010.xsl>

<http://digital.cjh.org/xsl/yivo2010.xsl>

<http://digital.cjh.org/xsl/asf2010.xsl>

<http://digital.cjh.org/xsl/yum2010.xsl>

The partners all share one stylesheet for the container list of the finding aids, which is viewable here:

[http://digital.cjh.org/xsl/containerlist\\_2010.xsl](http://digital.cjh.org/xsl/containerlist_2010.xsl)

### **EAD Templates**

\\cfjh09\FindingAids\CJH\EAD Administration\EAD Templates\AJHStemplate

\\cfjh09\FindingAids\CJH\EAD Administration\EAD Templates\LBItemplate

\\cfjh09\FindingAids\CJH\EAD Administration\EAD Templates\ASFtemplate

\\cfjh09\FindingAids\CJH\EAD Administration\EAD Templates\YIVOtemplate

\\cfjh09\FindingAids\CJH\EAD Administration\EAD Templates\YUMtemplate

### **Special Characters**

When encoders use ampersand (&) or lesser than and greater than signs (<, >), these characters have to be written in their HTML equivalents: '&amp;' (&), '&lt;' (<), and '&gt;' (>). Otherwise the XML file won't validate.

You can cut and paste any language character directly into your XML, and it will appear correctly in the HTML. **Note, however:** Special characters copied from LC may be problematic (particularly characters transcribed from Hebrew and Slavic languages). Often characters which look fine on the LC pages (either authorities.loc.gov or id.loc.gov) paste funny into Oxygen,

where they still look fine—but when the HTML is rendered they turn up completely scrambled.

To ensure good HTML output, you can encode all special characters in Unicode/UTF-8. The more straightforward tool in Oxygen is the character map, which can be accessed either by going to Edit → Insert from Character Map, or by clicking on the character map icon in the upper left of the editor pane. If you don't have the character map icon visible, you can add it by going to Perspective → Configure Toolbars and clicking "Unicode." However, not all Unicode characters are available on the Character Map and those can be hand-encoded in the Unicode into the finding aid, but it's a bit more complicated:

- Go to [unicode.org/charts](http://unicode.org/charts) and find the character you need. Lets say, Ħ for example.
- Using the 4-character alphanumeric code under the character, plop it into the following "hexadecimal" formula: `&#xCODE`. In the case of Ħ, the 4-digit unicode code is 1e24, so the hexadecimal encoding in the finding aid would be `&#x1e24`.

## YIVO

There are two major particularities when encoding for YIVO. Some of YIVO's collections are paginated, and many of YIVO's legacy finding aids will require that you extract a folder title and relegate the rest of the information to folder-level scope and content notes.

An example of the code for pagination, as well as the code for YIVO's folder-level scope and content notes is below:

```
<c02 level="file">
<did>
<container type="folder">913</container>
<container type="item" label="Page">72725-72927</container>
<unittitle><emph render="bold">Collection inventories</emph></unittitle>
<unitdate>1930          </unitdate>
</did>
<scopecontent>
<p> drafts by E. Tcherikover, Borodiansky and Rapaport, Yiddish<lb/> Reel 73</p>
</scopecontent>
</c02>
```

You can see how this displays in the Simon Dubnow Papers finding aid:

<http://findingaids.cjh.org/?pID=1413626#serl>

For folders that exist in the legacy description but are not found in the physical collection, the procedure is to encode the folders but comment them out. This is done by encoding the folder as normal in oXygen, then triple-clicking opening `<c0x>` tag to to select the entire element, and hitting ctrl-shift-comma to comment out the element.

The EAD code that is output by the program Archon does not fit with the stylesheets used by the Center. Any EAD from Archon needs the following changes made.

- This text needs to be removed from the header section:

```
xmlns="urn:isbn:1-931666-22-9" xmlns:xlink="http://www.w3.org/1999/xlink"  
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"  
xsi:schemaLocation="http://www.loc.gov/ead/ http://www.loc.gov/ead/ead.xsd"
```

- The publication statement should be formatted as follows:

```
<publicationstmt> <address> <addressline>YIVO Institute for Jewish Research</addressline>  
<addressline>Center for Jewish History</addressline> <addressline>15 West 16th  
Street</addressline> <addressline>New York, NY 10011</addressline>  
<addressline>Phone: (212) 246-6080</addressline> <addressline>Fax: (212)  
292-1892</addressline> <addressline>Email: <emph> <extref  
href="mailto:archives@yivo.cjh.org">archives@yivo.cjh.org</extref></emph> </addressline>  
<addressline>URL: <emph> <extref  
href="http://www.yivoinstitute.org">http://www.yivoinstitute.org</extref></emph></addressline>  
</address> <p> <date encodinganalog="260$c" type="publication">©2008</date> YIVO Institute  
for Jewish Research. All rights reserved.</p> <publisher encodinganalog="260$b">Center for  
Jewish History, Publisher.</publisher> </publicationstmt>
```

## LBI

The Acquisition Information field is suppressed in the public display of the finding aid. There is no need to put this into the EAD, as the information is maintained in the ALEPH record and in a separate donor database.

## AJHS

The AJHS stylesheet has boilerplate text for the Access Restrictions field which will override any differing text you might incorporate into this field. To override the boilerplate, use `altrender="alt_note"` in the opening `<accessrestrict>` tag.

See below example code from the Goldie Milgram Papers:

<http://findingaids.cjh.org/?pID=552551#a14>

```
<accessrestrict id="a14" encodinganalog="506$a" altrender="alt_note">  
  <head>Access Restrictions</head>  
  <p>The collection is open to all researchers by permission of the Director of Library and  
Archives of the American Jewish Historical Society. Personal correspondence, writings and  
journals and academic work not completed by Rabbi Milgram have been restricted until 2050.  
This includes certain material on the external hard drive. Permission to quote from the collection  
must be obtained from the originating source.</p>
```

</accessrestrict>

## Sections

In the interest of avoiding sub-subseries or subseries that feel like overkill or when you would like to cut out folder information that is repetitive, use sections. Sections can often simplify both the presentation and the work. See an example of sections here:

<http://findingaids.cjh.org/?pID=365445#serIV>

Below is one example of the code. Sections can occur at any component level (c01, c02, c03, etc.) -- you just have to define that component level as "otherlevel" and then define otherlevel as "section."

```
<c02 level="otherlevel" otherlevel="section">
  <did>
    <unittitle><emph render="bold">Binders</emph></unittitle>
  </did>
</c02>
```

## Adding an Image to the Finding Aid

If Partners would like to add an image from the collection to the Biographical/Historical Note of the finding aid, first the master image must already be ingested into DigiTool. If no master image exists in DigiTool and the digital image is uploaded to a new PID without metadata, please add "Image added to illustrate the [collection title] finding aid at PID [#####]."

We must then resize the master image, thereby creating a thumbnail image. Because of the specific width and margin values for the Biographical/Historical Note image in the CSS stylesheet, a thumbnail must always be at least 150 pixels wide. Otherwise, it won't entirely fill the block set aside for the image. There will be a gap on the right side between the image and gray border. There is no such limitation on the height. Note that as of May 2014, the image can be wider than 150 pixels -- the stylesheets will automatically resize the caption as needed.

Downloading the TIFF from DigiTool to the local drive: To find the PID of an existing image, search access.cjh.org and expand the record. The PID is the first value in the expanded view. Next, log in to DigiTool and connect to the correct repository. Enter the PID number to pull up the record. Click the "Streamref" tab and choose Download object. If there is no download option, click Manifestations in the lower left corner, and choose the archival/Tiff image.

Using Irfanview, edit the TIFF down to between 150 and 300 pixels wide (Image > Resize/resample > Width = 150 [300] pixels). Save the file as a JPEG. Place this JPEG in a

shared folder that is accessible to the Center's application server (also known as Remote Desktop, tsweb or CFJH11). Log in to DigiTool and connect to the appropriate Partner. Click on "Object" > "Insert New Object" and follow the below directions, adapted from the directions for adding a new object.

Fill in the following fields in the new window that opens:

Label: [some basic description of the item in hand]

Note: [note the title of the collection this is for and the PID for the finding aid you'll be linking to this item from]

Usage type: thumbnail

Entity type: image

Partitions ABC: [leave blank]

Status: default

Preservation level: default

Click "Create." Note the newly created PID number. Go to the Stream Ref tab and attach the resized JPEG. Next, go to the record of the original TIFF. Once in the record of the original TIFF, click on the "Last accessed" panel. There, right-click on the PID of the 150-pixel JPEG and click "move to current objects manifestation group."

Now you can embed the image in the <head> of the <bioghist> field, as depicted in the below sample code. Following HREF, enter the permanent URL which includes the new PID, and using the attributes ALTRENDER and TITLE, insert an image caption. This caption will also appear in case the image is at any point is unavailable.

```
<bioghist encodinganalog="545bb\\$a" id="a2">
```

```
<head>Biographical Note<extptr actuate="onload" altrender="Portrait of Max Markreich  
(1881-1962)" href="http://digital.cjh.org/webclient/DeliveryManager?pid=1165372"  
show="embed" title="Portrait of Max Markreich (1881-1962)"/></head>
```

```
<p>...</p>
```

```
</bioghist>
```

### **Transferring the Folder List from Excel to oXgyen**

Yakov created the below Excel-to-XML crosswalk, which saves time for those of us who generate folder lists in Excel. Insert blank columns around your box, folder, title and date columns, and populate them with the level-appropriate codes. Series by series and subseries by subseries cut and paste your spreadsheet into the corresponding places in the XML file.

			Box		Folder		Folder Title		Dates						
<c02 level="file">	<did>	<container type="box">	1	</container>	<container type="folder">	1	</container>	<unittitle>	<i>Bullfighter fro</i>	</unittitle>	<unitdate>	1952	</unitdate>	</did>	</c02>
<c02 level="file">	<did>	<container type="box">	1	</container>	<container type="folder">	2	</container>	<unittitle>	Film Proposal k	</unittitle>	<unitdate>	2001	</unitdate>	</did>	</c02>
<c02 level="file">	<did>	<container type="box">	1	</container>	<container type="folder">	3	</container>	<unittitle>	Newspaper Cl	</unittitle>	<unitdate>	1929, 195	</unitdate>	</did>	</c02>
<c02 level="file">	<did>	<container type="box">	1	</container>	<container type="folder">	4	</container>	<unittitle>	Photographs	</unittitle>	<unitdate>	undated,	</unitdate>	</did>	</c02>
<c02 level="file">	<did>	<container type="box">	1	</container>	<container type="folder">	5	</container>	<unittitle>	Photographs	</unittitle>	<unitdate>	undated,	</unitdate>	</did>	</c02>
<c02 level="file">	<did>	<container type="box">	1	</container>	<container type="folder">	6	</container>	<unittitle>	Photographs	</unittitle>	<unitdate>	1932	</unitdate>	</did>	</c02>
<c02 level="file">	<did>	<container type="box">	1	</container>	<container type="folder">	7	</container>	<unittitle>	Photographs	</unittitle>	<unitdate>	1976	</unitdate>	</did>	</c02>
<c02 level="file">	<did>	<container type="box">	1	</container>	<container type="folder">	8	</container>	<unittitle>	Photographs	</unittitle>	<unitdate>	1926	</unitdate>	</did>	</c02>
<c02 level="file">	<did>	<container type="box">	1	</container>	<container type="folder">	9	</container>	<unittitle>	Photographs	</unittitle>	<unitdate>	1936	</unitdate>	</did>	</c02>

The PASCL Hidden Collections project created an Excel file that automatically generates EAD. It might worth checking out: [http://tiki.cjh.org/tiki-download\\_file.php?fileId=244](http://tiki.cjh.org/tiki-download_file.php?fileId=244)

## Linking to related finding aids in the center

To link to a related finding aid at the center in your EAD finding aid, use the address from the work log (<http://digital.cjh.org/webclient/DeliveryManager?pid=>) plus the desired collection's pid after the = sign.

## Collections that have no series (or are as a whole the equivalent of one series)

If your collection is the equivalent of one series, that is, you have not arranged it into multiple series, then you do not need to add a series-level scope and content note to the finding aid. The collection-level scope and content note will suffice. To make the finding aid transform correctly, though, encode the container list (i.e. the <dsc>) in the following way:

You must include the <c01> level and its <unittitle>. It is a good idea to add the <unitdate> under the <c01> as well because otherwise after it transforms it will read "So-and-So Collection," with an awkward comma that you can't delete (except through the stylesheets of course, but it's better to just add the date in this case than create a different stylesheet!).

Here is what the EAD should look like for the container list without the series-level scope and content note (this is an abbreviated container list showing only two folders):

```
<dsc id="a23" type="combined">
  <head>Container List</head>
  <c01 level="collection">
    <did>
      <unittitle>Eva Schiffer Family Collection</unittitle>
      <unitdate type="inclusive" normal="1897/2011">1897-2011</unitdate>
    </did>
  <c02 level="file">
    <did>
      <container type="box"> 1 </container>
      <container type="folder"> 1 </container>
    </did>
  </c02>
</dsc>
```



```
<unittitle> Schiffer, Eva - Biography </unittitle>
<unitdate> circa 2011 </unitdate>
</did>
</c02>
<c02 level="file">
<did>
<container type="box"> 1 </container>
<container type="folder"> 2 </container>
<unittitle> Schiffer, Eva - Autograph album </unittitle>
<unitdate> 1933-1940 </unitdate>
</did>
</c02>
</c01>
</dsc>
```

## 6. Partner Approval

When you have completed your finding aid, send an email to Archival Processing Lab. A colleague will volunteer to review your finding aid.

When you have completed your final draft of the finding aid, send the finding aid to your partner contact for her/his approval. Incorporate any suggested changes that seem appropriate. Grammatical, spelling and stylistic changes are up to the individual processing archivist and the partner archivist.

### *AJHS*

Send the HTML to Tanya and Susan Malbin.

### *ASF*

Send the HTML to Randy Belinfante.

### *LBI*

Place a Word file of the final finding aid in the 1st proofs folder in the shared drive (\\Finding Aids\EAD\_Finding Aids\1\_First proof) and email Hermann to let him know it is there. When he has reviewed it, he will place it, with comments if any, in the 2nd proofs folder and let you know. When the finding aid is done, in addition to all the steps outlined below, place a copy in the Done folder (\\Finding Aids\EAD\_Finding Aids\Final\_version\Done).

**Be sure to print a hard-copy and place it in front of the first folder in the first box. This is part of**

the microfilming workflow and is critical.

*YIVO*

Send an HTML file to Fruma and a Word file to Marek Web. If it's a collection under Krysia Fisher's purview, send the HTML file to her as well. Cc Lyudmila Sholokhova on all correspondence.

## 7. EAD Ingest and Records Creation

### Ingesting the EAD File to DigiTool

Within Oxygen XML Editor, save your EAD file in your own folder within \\cfjh09\FindingAids\CJH\Archivists

If you do not have DigiTool installed locally on your computer:

*Connect to the Center's application server, known as RD Web or the Remote Desktop by going to <https://rdweb.cfjh.net/RDWeb/Pages/en-US/login.aspx?ReturnUrl=default.aspx> in Internet Explorer (Firefox and other browsers will not work). Log in using the same user name and password you use for your computer and e-mail account. Then follow the steps below.*

Open and/or Double-click on Meditor, which is the DigiTool administration client (aka the back-end of DigiTool). Log-in using your DigiTool user name and password.

Click on the "DigiTool" tab and select the repository whose finding aid you are ingesting.

If you are uploading a finding aid for a collection for which there is no previous finding aid or box list, click on the "Object" tab in the object menu and select "Insert New Object."

A new window opens which prompts you to fill in basic information about the object. In "Label" enter the name of the collection; set the entity type to "EAD File"; and then click on the button "Create."

You have now created a new digital object with a unique PID (Persistent Identifier), appearing to the left of the "Control" and "Stream Ref" tabs. It's useful to record the assigned PID number, though you can also always find it again by searching for the name of the collection in DigiTool's search module.

Next click on the "Stream Ref" tab and then on the "Attach File" button. Find your EAD file on the shared drive and click "Open." Your file is now ingested into DigiTool under the assigned PID.

You can check what your aid looks like by clicking "View/Refresh Object" under the "Browser" tab, although DigiTool often crashes in response.

Now if you go to the URL, [http://digital.cjh.org/webclient/DeliveryManager?pid=\[insert your PID](http://digital.cjh.org/webclient/DeliveryManager?pid=[insert your PID)

number here], you'll see your finding aid is already live online.

If you are uploading a finding aid for a collection for which there is a previous finding aid or box list, you must find and use that finding aid's PID number for your new finding aid, thereby preventing the proliferation of multiple aids for one collection. You can locate this PID either by doing a search on the collection name using DigiTool search function, or if Meditor crashes during the search, you can also determine the PID by running your mouse over the link to that finding aid in Primo (search.cjh.org) and looking at the number at the end of the URL string that appears at the foot of your browser.

YIVO

Once you've ingested your finding aid into DigiTool, email the XML file to Willie DeVries at willie@wdevries.com, so he can put it into Archon as well -- he's the YIVO consultant working on Archon. Please cc Fruma, Ettie Goldwasser and Roberta Newman on this step as well.

## Records Creation

After the finding aid has been uploaded to DigiTool, it is not yet visible to the public unless someone has the direct PURL. It needs to be made visible in three places within the Center's systems: the finding aids website, the catalog (Aleph), and Digital Collections (DigiTool).

***Uploading a Finding Aid to the Center's Finding Aid Website ( <http://www.cjh.org/p/93> )***

Google crawls the Center's finding aid site, so we want to be sure our finding aids are posted on the Center's website.

Our webmaster Jason Carlin created a web form that we fill out, and then he uploads the information we provide in that form.

Go to: <http://findingaids.cjh.org/eadadd.php>

Log-in:

Username: findingaids

Password: 3adxmone

Fill in all the fields.

Partner:

Title: [search on the Center's finding aid website {<http://www.cjh.org/p/93>} for the usual

formatting and punctuation in this field as each partner is different and there are also variations within each partner. Pick a format and stick with it. Variations include such titles as:

Philip Bernstein (1901-1985). Papers, undated, 1926-1995

Irving J. Block, 1923-2002. Papers, 1944-2008 (bulk 1953-2002)

Cahan, Abraham (1860-1951). Papers, 1890-1987

Educational Alliance . Records, 1879-1968

Hebrew Immigrant Aid Society (HIAS). Collection, 1917-1993

Call Number: [record group # that the partner has assigned the collection]

Languages: [take this straight from the language field in your descriptive summary]

Abstract: [take this straight from the abstract in your descriptive summary]

Digitool PID/Record ID: [PID number]

Click "Submit Query." Jason usually uploads the information within a few hours or a day.

### ***ALEPH and Digital Collections Records***

The next step is to create or modify the records for our finding aids/collections in both Aleph (opac.cjh.org) and Digital Collections (access.cjh.org).

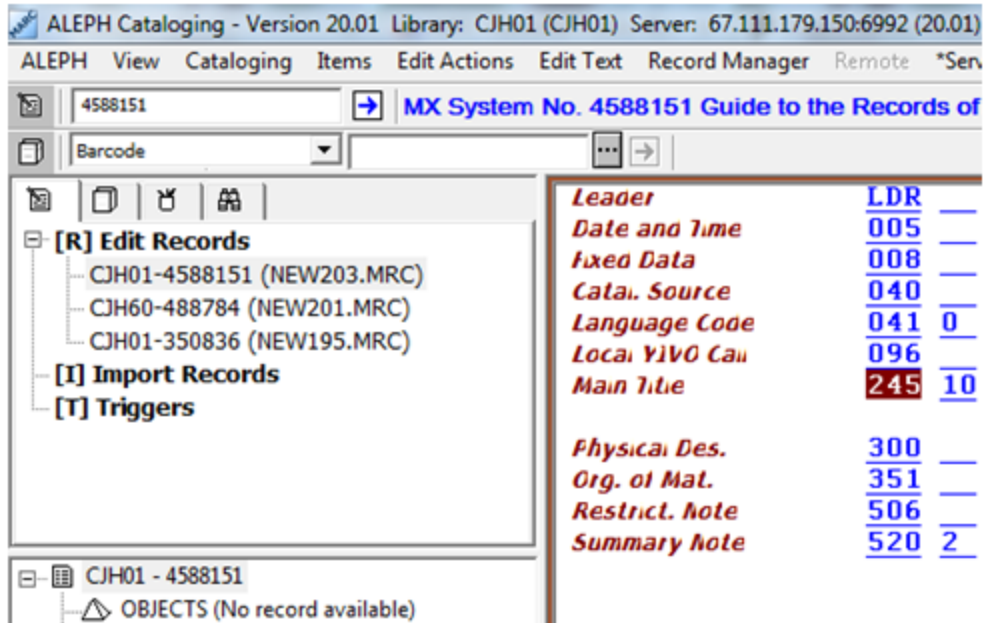
*ASF, YIVO and YUM*

**If there is already a record in Aleph** for the relevant collection, then follow the below steps for adding the appropriate finding aid link and genre/form terms to the Aleph record and for generating the DigiTool record.

Adding the link and genre/form terms to the Aleph record:

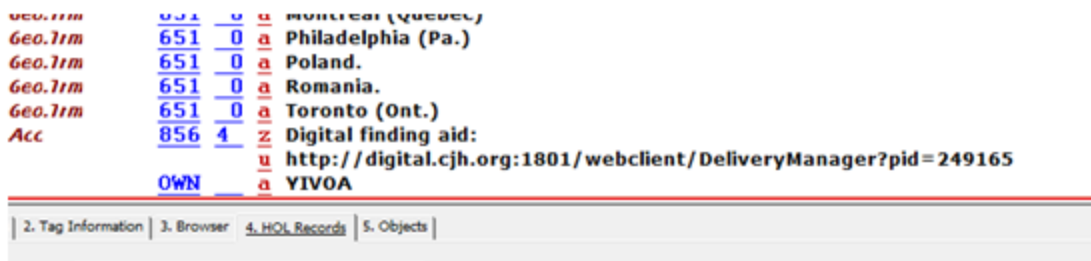
1. Open Aleph and pull up the cataloging record using the system number.

(You can find this # via searching the front-end OPAC at <http://opac.cjh.org>, selecting the "MARC tags" view of the record. The system number should be at the bottom, in a field called SYS.)



2. Add the text "Digital Finding Aid" to field **856 4 \$z** and the link [http://digital.cjh.org:1801/webclient/DeliveryManager?pid=\[your pid\]](http://digital.cjh.org:1801/webclient/DeliveryManager?pid=[your pid]) to the **\$u** subfield below.

You can use F6 to add a new field, or copy and paste an existing 856 field from another Aleph record using CTRL+T for copy field and ALT+T for paste field. Use F7 to add the Subfield, or the Edit Text > New Subfield command.



3. Click on the Save on Server and Local Drive button on the upper right of the screen. (The one with the little red triangle/arrow)



4. If the record does not contain the following two values for 655 Index term--genre/form, please add them:

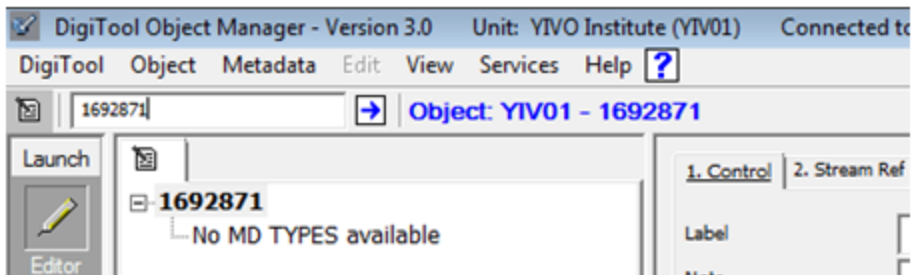
655 #0 \$a Archival materials

655 #0 \$a Finding aids

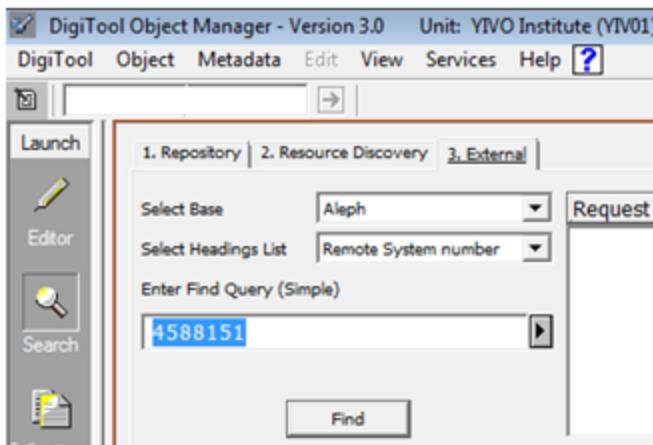
5. Click on the Save on Server and Local Drive button again.

Copying the Aleph record to the object in DigiTool:

1. First pull up the finding aid in Meditor using the PID



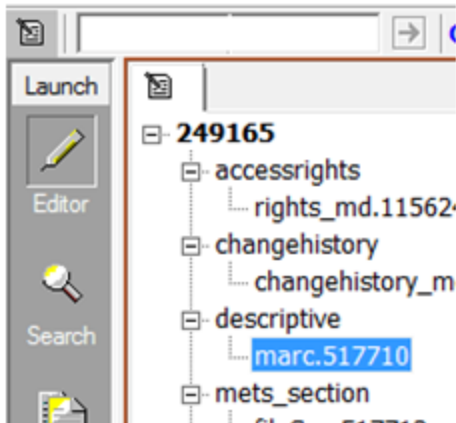
2. Next, click on the Search tab and then open 3. External. Choose Aleph as the base and Remote System Number as the Select Headings List. Enter the Aleph System ID in the Enter Find Query Section.



3. Highlight the correct record and then click on Copy to Object:



4. The Record Tree in Meditor should now show a marc record under the descriptive metadata.



**Finally, also for collections that already have records in Aleph**, most likely there is an old 2011 record in DigiTool with an accompanying MARC2XML finding aid that is suppressed. These old records and MARC2XML finding aids should be deleted after we've migrated the revised Aleph record into DigiTool. Instructions and permissions for this still to come.

**If there is no record in Aleph for the collection**, send the XML file and the PID number to Lauren Bradley. Using MARCEdit she will generate a MARC record (with links and all appropriate form/genre terms) using the XML file. It is our responsibility to then migrate the Aleph record into DigiTool, so after Lauren has indicated the MARC record is ready in Aleph, follow the [Copying the Aleph record to the object in DigiTool](#) instructions above.

*AJHS*

Email the PURL and PID to Tanya and Christine McEvilly (who handles the Digital Collections record).

*LBI*

Email the PURL and PID to Hermann.



## 8. Administrative Details

### ***Backup***

For our own personal use, we save and backup our files in our grant-specific or personal directories, especially our XML files.

### ***Final Stages***

When you get to the final stages of your collection work and encoding, consider asking the partner archivist for a decision on the next collection to be a few days or so in advance of when you might expect to finish.

### ***Labelling and Barcoding***

#### ***AJHS***

Barcode template is in \\cfjh09\FindingAids\CJH\Partners\AJHS\AJHS barcode template

Box label template is in \\cfjh09\FindingAids\CJH\Partners\AJHS\AJHS sample box label template

Give barcode sheet to Tanya.

#### ***LBI***

Box label templates are in \\cfjh09\FindingAids\CJH\Partners\LBI\LBI-BoxLabelTemplate

### ***Work Log***

Fill out the final collection information (size, work end date, PID, highlights, URL) on the Processing Work Log:

<https://docs.google.com/spreadsheet/ccc?key=0AmFdXgcBJCfqdGRWOFhOb01INEdtZUw1eG40ajN3U3c#gid=0>

### ***Collection Highlights, Preservation and Wikipedia Report***

Fill out the Collection Highlights, Preservation and Wikipedia Report, aka the web form:

<https://docs.google.com/spreadsheet/viewform?formkey=dDFMS3IHY0x0NnRCUmtnaDdEb0pWUUE6MQ#gid=0>

### ***Reference***

Partners generally close the collections we're processing to researchers, but on occasion there are questions the partner archivist may ask us to field. If you receive a direct inquiry from a researcher without any reference to the partner archivists, check in with the partner archivist before you respond and then cc the archivist on your response. We answer researchers' questions related to the collections to the best of our abilities while we're processing them. Occasionally partner archivists may also have questions for us about the collections we've processed in the past or ask us to help them choose materials for an exhibit or publicity.

### ***Collection Donor Relations***

Sometimes collection donors will get in touch with partners during or after our processing, and that may mean we interact with the donors, talk to them about the collection creator, etc. We do not accept or handle deeds of gift – that is the responsibility of the partners.

If the partner okays it and the donor of the collection contactable (by earthly means, of course [although if you have the ability to talk to them in other fashion please do so and share this with the rest of us]), consider sending your finding aid on to the donor.

### ***Grant Reporting and Journalists***

It's useful to keep in mind compelling highlights from your collections. Consider keeping a document of highlights for each collection, which you can then cut and paste into the work report form.

### ***Supplies***

Standard size archival supplies (manuscript boxes, legal-size folders, mylar/photo sleeves, office supplies [except for anything printer-related]) come out of Center archives grants. Anything we use infrequently (non-standard sizes such as OS folders and OS boxes and other specially sized boxes and folders) we use Partner supplies.

### ***Outreach***

#### **Wikipedia**

As archivists we are ethically bound to encourage discovery of the processed materials. The Center is embracing Wikipedia, and as of August 2012 part of our workflow includes adding links to the finding aid in relevant Wikipedia entries.

#### **A. Adding links to finding aids**

1. Search for the page, either the person or institution, or a directly related topic.

\*If no page exists, and the person or institution is notable and should have a page, or if the page needs help (more content, editing, a photo, etc), add note in Wikipedia Pages for Improvement

form:

<https://docs.google.com/spreadsheet/viewform?formkey=dGtjTUJLbkFYQjhpZjhoWHZjVnVfdVE6MQ>

2. Click "edit" the References or External Links section

\*If no References or External Links exist, click "edit" at top, scroll toward bottom, and insert on its own line, just above the first "{{": == *External links* ==

3. Add link (non-LBI)::

*[<http://findingaids.cjh.org/?pID=1463157> Seymour Pomrenze Collection] at the [\[\[American Jewish Historical Society\]\]](#)*

3b. Add link (LBI: use this template):

*{{LBI Collection Links|pid=431122|title=Julius Bab Collection|partner=Leo Baeck Institute, New York |callNumber=AR 196 | type=Archival Collection}}*

4. Go to Edit Summary and add note "Added link to finding aid of archival collection"

5. Click Show Preview and check the edit

6. Click Save Page.

## **B. Adding authority control template**

1. Get VIAF and LC numbers and insert into this template:

*{{Authority control |LCCN=n/50/007013 |VIAF=36939733}}*

2. Click "Edit" at top

3. Insert template just above {{persondata}}, toward bottom

4. Go to Edit Summary and add note "Added authority control template VIAF and LC"

5. Click Show Preview and check the edit and links

6. Click Save Page.

See the [Agenda from the 9/18/2013 METRO Workshop Introduction to Wikipedia for Libraries, Archives, and Museums](#) for an extensive list of links to resources, examples, and relevant Wiki groups. (Lea Lange and Alyssa Carver have local copies of this list if the link above does not work).

## **Blogging**

We have our own "Out of the Archives" series on the Center's Tumblr blog, where we share interesting finds or archival thoughts. Consider contributing and run your post past your partner archivist contact (if the post is specifically about one of the partner's collections) before sending it on to Miriam Haier who will post it to the blog.

<http://16thstreet.tumblr.com/tagged/Out-of-the-Archives>

## **Facebook**

Keep the Center's Facebook page in mind as a very occasional option for collections that you feel deserve an extra plug. If anything pops up you'd like out there, email Miriam Haier, who

manages the Center's Facebook page.

## 9. Completion Checklist

Here is a handy checklist to review, once you have completed processing:

- Did you return all boxes and items, including oversize?
- Did you perform all partner-specific barcoding and labeling?
- Did you make relevant changes to the MARC record, or inform the correct party?
- Did you update the processing work log?
- Did you update the supplies spreadsheet?
- Did you add a link to the relevant Wikipedia page, or note that a page is needed?
- Have you considered writing a blog post about the collection?
- Have you written a Facebook post about the collection?
- Are there highlights to be noted?
- Did you send a link to the finding aid to collection donor (if still alive and if this move is okayed by the partner)?

## 10. Revisions

### ***In the EAD***

If you need to make changes to the EAD, note the date, a quick summary of the changes and who made the changes in the EAD header.

### ***Reingesting to DigiTool***

If you make any changes to your EAD, you must reingest this new version into DigiTool using the old PID number. Go into Meditor (for instructions see 7. EAD Ingest and Records Creation) and search on the known PID number for the finding aid. Look at when and who last revised the digital object. If any changes have been made since you last ingested your file, then your own changes must be made to that master version in DigiTool.

When you are certain you are updating the correct object with the correct file, click the "2. Stream Ref" tab, then click the "Attach File"; and attach the new version. You may see what your revised aid looks like by clicking "View/Refresh Object."

### ***Finding Aids Site***

If you are making large changes in the finding aids site, then resubmit the webform. If you are making a small change or two, then contact our webmaster Jason Carlin via email, and he will fix them. Also, if you see any duplicates, email Jason directly about this.

### ***ALEPH or Digital Collections Records***

If any changes need to be made to records or you notice any discrepancies between ALEPH and Digital Collections records, contact the partner.

### ***AJHS***

Email Tanya and Christine with the specifics of the problem.