

## INSTRUCTIONS FOR ENTERING FINDING AID DATA IN ARCHIVISTS' TOOLKIT RESOURCE RECORDS

Archivists' Toolkit is the collection management and archival description tool in use at USC Libraries. To create a full and complete finding aid in Archivists' Toolkit, archival processors are required to adhere to a set of requirements for entering data. These requirements are drawn from best practices guidelines for AT published by the Online Archive of California ([http://www.cdlib.org/services/dsc/tools/ead\\_toolkit.html](http://www.cdlib.org/services/dsc/tools/ead_toolkit.html)), DACS content standards (<http://desktop.loc.gov/saved/DACS>), and EAD structure standards (<http://www.loc.gov/ead/>). For additional technical instructions, please refer to the [Archivists' Toolkit manual](#), specifically Chapter 9, Describing Archival Materials

Full and complete finding aids created in Archivists' Toolkit are required to contain the following:

- 1) Level
- 2) Title
- 3) Date expression and/or Begin Date and End Date
- 4) Resource Identifier
- 5) Extent Number and Extent Measurement
- 6) Language Code
- 7) Minimum of 3 names/subjects/genres—can be a combination of any of these types, but must total 3
- 8) Abstract note
- 9) Conditions Governing Access note
- 10) Conditions Governing Use note
- 11) Preferred Citation note
- 12) Immediate Source of Acquisition note
- 13) Biographical/Historical note
- 14) Scope and Contents note

It is highly recommended that the finding aid also include:

- 15) Arrangement note

Numbers 1-12 should already be in the resource record that was created by the curator from the accession record. If you begin work on a collection that does not already have a resource record in Archivists' Toolkit, please contact the curator in charge of the collection.

## The Basic Resource Record

To begin entering your finding aid data, first locate the appropriate resource record.

Open Archivists' Toolkit, click on "Resources" in the left column, then on the "List All" button

The screenshot shows the Archivists' Toolkit software interface. The title bar reads "Archivists' Toolkit - 2.0.0 - update 3". The menu bar includes "File", "Import", "Setup", "Reports", "Tools", and "Help". The toolbar contains icons for "Search", "List All", "New Record", "Reports", "Delete", "Merge", "EAD Export EAD", and "MARC Export MARC". A search filter box is labeled "Filter search results".

In the left-hand navigation pane, the "Resources" option is selected and highlighted in blue. A red arrow points from the text above to the "List All" button in the toolbar.

The main window displays a table of 916 records found for the search "list all". The table has the following columns: Title, Extent Number, Resource Id, Extent Measurement, and Resource Identifier.

Title	Extent Number	Resource Id	Extent Measurement	Resource Identifier
Amy C. Ransome Collection	3.38		5 Linear feet	0001
Henry Lane Wilson Papers	4		57 Linear feet	0002
Civil War/Naval Operations (Mr...	1		59 Linear feet	0003
J. E. Woodhead Papers	7		63 Linear feet	0004
Admiral William H. Standley Pap...	46		67 Linear feet	0005
Samuel H. Kline Papers	1		71 Linear feet	0006
George Hoyningen-Huene Colle...	2		76 Linear feet	0007
Coulter's Dry Goods Papers	4		55 Linear feet	0008
History of Hungary Collection	2		84 Linear feet	0009
Lionel Stevenson Papers	1		364 Linear feet	0010
Gene Fowler Papers	1		366 Linear feet	0011
Del M. Reynolds Papers	1		88 Linear feet	0012
Alexander J. Stoddard Papers	11.08		89 Linear feet	0013
Bowen Family Letters (Elizabet...	1		93 Linear feet	0014
Antonio Heras Papers	4.67		105 Linear feet	0015
Charles Leland Bagley Papers	20.46		14 Linear feet	0016
American Personnel and Guidan...	6		114 Linear feet	0017
Agua Caliente Indians (Judge H...	2		118 Linear feet	0018
American Guild of Organists Re...	14.92		11 Linear feet	0019
Poe Society Records	1		120 Linear feet	0020
Irving Shulman Papers	19.67		124 Linear feet	0021
The Scribes Records	1.25		127 Linear feet	0022
Charles Bonner Papers	1		368 Linear feet	0023
Gen. Leland R. Scofield Collection	1		130 Linear feet	0024
Adam C. Derkum Papers	1		133 Linear feet	0025
Southern California Rapid Tran...	2.25		669 Linear feet	0026
John A. Sanborn Papers	1.25		140 Linear feet	0027
Ampico Piano Rolls Collection	8		142 Linear feet	0028
Malcolm Stuart Boylan Papers	1		370 Linear feet	0029
Gladys Hurlbut Papers	1		372 Linear feet	0030
Julius Berstl Papers	8		15 Linear feet	0031
Art Prints (H.L. Doolittle Coll.)	5		145 Linear feet	0032
Darwin L. Teilhet Papers	1		374 Linear feet	0033
Bruno David Ussher Collection	1		147 Linear feet	0034
Mary Wood Hinman Collection	1		41 Linear feet	0035
William Schneiderman Records	1		150 Linear feet	0036
Mineral King Development Reco...	1		376 Linear feet	0037
Stereographic Library Collection	12		154 Linear feet	0038

Scroll down until you reach the correct resource identifier (aka collection number), or type part of the name or resource identifier into the “Filter Search Results” box. Double click on the resource to open the record.

You should have a basic resource record now open. There should be minimal data in each of the four tabs of the resource record, as follows.

On the Basic Description tab, you should see:

The screenshot displays the 'Resources' interface with the 'Basic Description' tab selected. The interface is divided into several sections:

- Title:** '0999: Melinda Hayes papers' (highlighted with a red arrow from the label 'title').
- Resource Identifier:** '0999' (highlighted with a red arrow from the label 'resource identifier').
- Inclusive Dates:** 'Begin 1985 End 2010' (highlighted with a red arrow from the label 'dates').
- Language:** 'English (eng)' (highlighted with a red arrow from the label 'language').
- Extent:** 'Extent Number 50 Linear feet' and 'Container Summary 50 bankers boxes' (highlighted with a red arrow from the label 'extent information').

The interface also includes a 'Basic Description' tab, 'Names & Subjects', 'Notes Etc. & Deaccessions', and 'Finding Aid Data' tabs. A 'Change Repository' button is visible at the bottom. The bottom toolbar contains buttons for 'Add Child', 'Add Sibling', 'Rapid Data Entry', 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD EAD', 'Export MARC MARC', and 'Export Cont. Labels'. Navigation buttons for 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', 'Save', and '+ 1' are also present.

On the Names & Subjects tab, you should see a minimum of three entries (combination of name, subject heading, genre/form).

The screenshot displays the 'Resources' interface for a specific record. The record title is '0999: Melinda Hayes papers'. The interface is divided into several sections:

- Navigation:** Tabs for 'Basic Description', 'Names & Subjects', 'Notes Etc. & Deaccessions', and 'Finding Aid Data'. The 'Names & Subjects' tab is currently selected.
- Names Section:** A table with columns 'Name', 'Name Link Function', and 'Name Link Creator / Subject Role'.

Name	Name Link Function	Name Link Creator / Subject Role
Hayes, Melinda, 1965-	Creator	
Hayes, Melinda, 1965-	Subject	

Below the table are buttons for 'Edit Name Link', 'Add Name Link', and 'Remove Name Link'.
- Subjects Section:** A list of subjects including 'Correspondence' and 'Dance--Archival resources'. Below the list are buttons for 'Add Subject Link' and 'Remove Subject Link'.
- Footer:** A row of utility buttons including 'Add Child', 'Add Sibling', 'Rapid Data Entry' (with a dropdown arrow), 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD', 'Export MARC', and 'Export Cont. Labels'. A second row of navigation buttons includes 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', 'Save', and '+ 1'.

On the Notes Etc. & Deaccessions tab, you should see 5 notes: Abstract, Conditions Governing Access, Conditions Governing Use, Immediate Source of Acquisition, and Preferred Citation. Some of these notes may need editing before you can publish your finding aid.

The screenshot shows a web-based interface for managing finding aids. The main window is titled 'Resources' and displays a list of resources on the left, with '0999: Melinda Hayes papers' selected. The main content area is divided into several tabs: 'Basic Description', 'Names & Subjects', 'Notes Etc. & Deaccessions' (which is active), and 'Finding Aid Data'. The 'Notes Etc.' section contains a table with the following data:

Type	Title	Content
Abstract	Abstract	Correspondence, subject files, p...
Conditions Governing Access	Conditions Governing Access	COLLECTION STORED OFF-SITE....
Conditions Governing Use	Conditions Governing Use	All requests for permission to p...
Immediate Source of Acquisition...	Acquisition	Gift of Melinda Hayes, 2010.
Preferred Citation	Preferred Citation	[Box/folder# or item name], Mel...

Below the table are buttons for 'Add note etc.' and 'Remove Note etc.'. The 'Deaccessions' section below it has columns for 'Deaccession Date', 'Extent', and 'Extent Measurement', with 'Add Deaccession' and 'Remove Deaccession' buttons. At the bottom of the interface is a toolbar with various actions: 'Add Child', 'Add Sibling', 'Rapid Data Entry', 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD', 'Export MARC', 'Export Cont. Labels', 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', 'Save', and '+ 1'.

On the Finding Aid Data tab, you will see the Finding Aid Filing Title, the Finding Aid Date, and the Finding Aid Status. The filing title should not change. The existing date refers to the date the resource record was created. That date will need to be changed when you are ready to publish your finding aid. The finding aid status refers to the publishable status of the resource record. It should be set to `publish_basic`.

The screenshot shows the 'Resources' window with the 'Finding Aid Data' tab selected. The resource is '0999: Melinda Hayes papers'. The 'Finding Aid Filing Title' is 'Hayes (Melinda) papers', the 'Finding Aid Date' is '2010', and the 'Finding Aid Status' is 'publish\_basic'. Red arrows on the left point to these three fields.

Labels on the left side of the image:

- Finding Aid Filing Title
- Finding Aid Date,
- Finding Aid Status

Fields in the 'Finding Aid Data' tab:

- EAD FA Unique Identifier
- EAD FA Location
- Finding Aid Title
- Finding Aid Subtitle
- Finding Aid Filing Title: Hayes (Melinda) papers
- Finding Aid Date: 2010
- Author
- Description Rules
- Language of Finding Aid
- Sponsor Note
- Edition Statement
- Series
- Revision Date
- Revision Description
- Finding Aid Status: publish\_basic
- Finding Aid Note

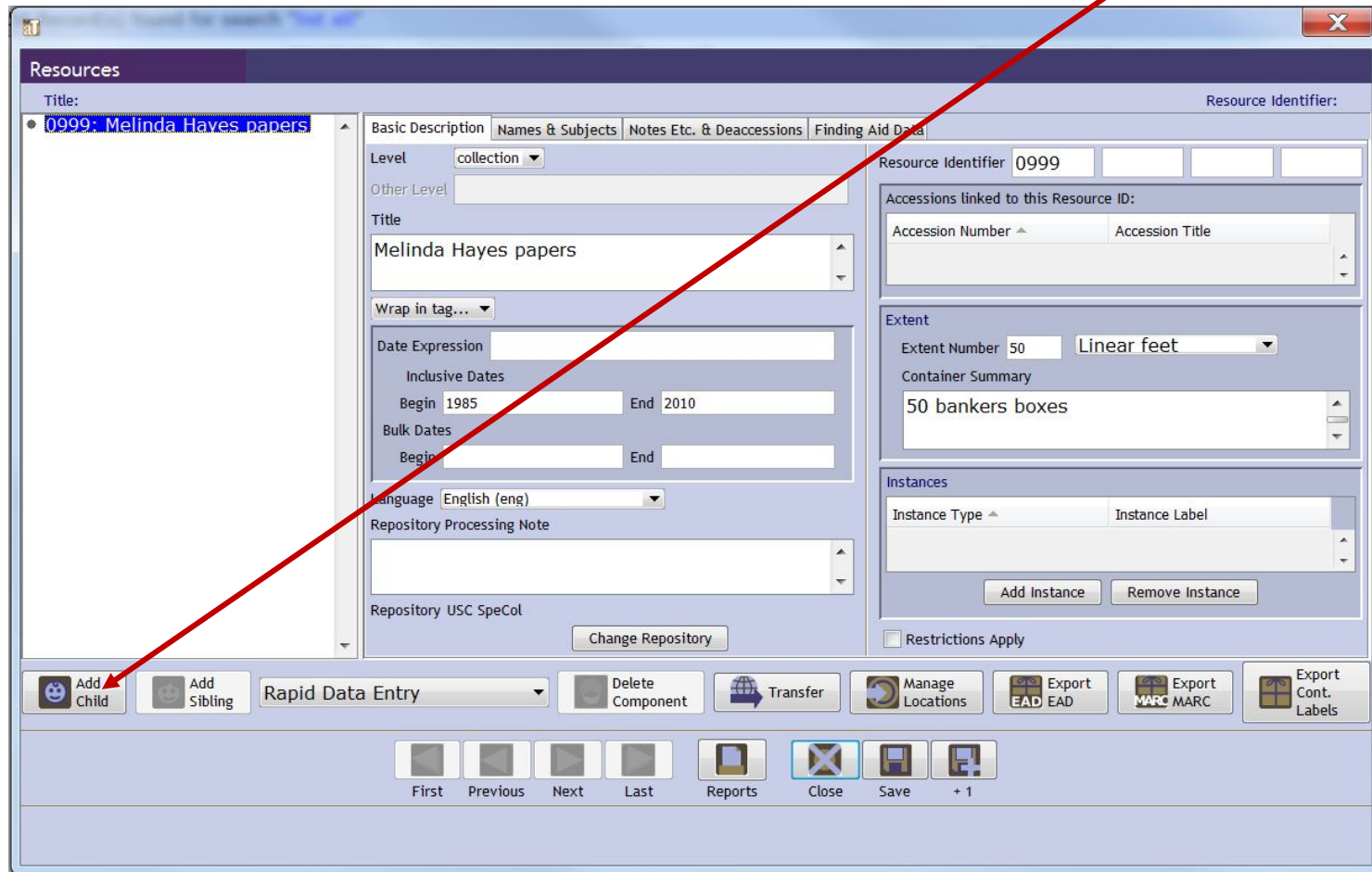
Buttons at the bottom:

- Add Child
- Add Sibling
- Rapid Data Entry
- Delete Component
- Transfer
- Manage Locations
- Export EAD EAD
- Export MARC MARC
- Export Cont. Labels
- First
- Previous
- Next
- Last
- Reports
- Close
- Save
- + 1



## The Basic Description tab

To add descriptive data to your resource record, make sure the Basic Description tab is your active screen. Click on the “Add Child” button.



A new basic description template will appear.

- 1) Select a level from the Level drop down list . You will be presented with a number of options; generally, you will be describing a collection at the series, file and/or item level, depending on the level of description you are applying to the collection (see [DACS, Chapter 1](#)).
- 2) Enter a title (of series, folder or item) in the Title field.
- 3) Enter a date expression (ie, natural language for a date; allows for use of “circa”, “about”, etc.) or begin and end dates. (Note: if you are entering data on a series, you may not yet know the exact dates. You can always go back and change this information at a later time.)
- 4) Click “Save” to save your work.

The screenshot shows the 'Resources' interface with the following components:

- Title:** Melinda Hayes Papers
- Resource Identifier:** 0999
- Level:** A dropdown menu with options: class, collection, file, fonds, item, otherlevel, recordgrp, series.
- Title:** A text input field.
- Date Expression:** A text input field.
- Date:** Fields for Date Begin, Date End, Bulk Dates, Bulk Date Begin, and Bulk Date End.
- Language Code:** A dropdown menu.
- Repository Processing Note:** A text area.
- Component Unique Identifier:** A text input field.
- Extent:** Fields for Extent Number and Container Summary.
- Instances:** A table with columns for Instance Type and Instance Label, and buttons for Add Instance and Remove Instance.
- Buttons:** Add Child, Add Sibling, Rapid Data Entry, Delete Component, Transfer, Manage Locations, Export EAD, Export MARC, Export Cont. Labels, First, Previous, Next, Last, Reports, Close, Save.
- Footer:** Created: Aug 18, 2010 by luftsche | Modified: Aug 18, 2010 by luftsche | Record Number: 992



When you enter descriptive data for the contents of a folder or an item, you must also enter descriptive data for that folder/item's physical (or digital) instance. Click on the "Add Instance" button.

The screenshot displays the 'Resources' interface for 'Melinda Hayes Papers'. The interface is divided into several sections:

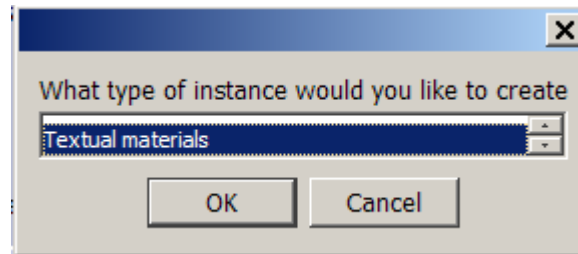
- Left Panel:** A tree view showing the hierarchy of resources, with '0999: Melinda Hayes Papers' selected.
- Basic Description Tab:** Contains fields for 'Level' (with a dropdown menu open showing options like 'class', 'collection', 'file', 'fonds', 'item', 'otherlevel', 'recordgrp', 'series'), 'Other Level', 'Title', 'Wrap in tag...', 'Date Expression', 'Date', 'Date Begin', 'Date End', 'Bulk Dates', 'Bulk Date Begin', 'Bulk Date End', 'Language Code', and 'Repository Processing Note'.
- Component Unique Identifier:** A text input field.
- Extent:** Includes 'Extent Number' and a 'Container Summary' text area.
- Instances:** A table with columns for 'Instance Type' and 'Instance Label'. Below the table are 'Add Instance' and 'Remove Instance' buttons, and checkboxes for 'Internal Only' and 'Restrictions Apply'.
- Bottom Bar:** Contains navigation buttons (First, Previous, Next, Last), 'Reports', 'Close', and 'Save' buttons. It also includes icons for 'Add Child', 'Add Sibling', 'Delete Component', 'Transfer', 'Manage Locations', and 'Export' options for EAD and MARC.

A red arrow points from the text above to the 'Add Instance' button in the 'Instances' section.

Record 1 of 1  
Resource Identifier: 0999

Created: Aug 18, 2010 by luftsche | Modified: Aug 18, 2010 by luftsche | Record Number: 992

A dialog box with a scroll list will appear. Click on the up or down arrow until you reach the appropriate description for your folder or item (e.g., photographs, ephemera, textual materials, etc.). Click "OK".



You will be prompted to enter container information.

- 1) Select the container type from the drop down list (box, drawer, folder, etc.)
- 2) Type the container number in the container indicator field
- 3) Continue with additional container information to reflect the granularity of your description
- 4) Click "OK" to close this screen and return to the Basic Description tab.

A screenshot of a software window titled "Resources Analog Instance". The window has a dark blue header bar with the title. Below the header, there are several sections. The first section is for "Container 1", with a dropdown menu for "Container 1 Type" and a text input field for "Container 1 Indicator". Below that is a text input field for "Container Barcode". The second section is for "Container 2", with a dropdown menu for "Container 2 Type" and a text input field for "Container 2 Indicator". The third section is for "Container 3", with a dropdown menu for "Container 3 Type" and a text input field for "Container 3 Indicator". Below these is a "Location" field with the text "No location assigned". At the bottom of the window is a toolbar with six buttons: "First", "Previous", "Next", "Last", "Cancel", and "OK". There is also a "+ 1" button.

When you have finished entering information, your Basic Description tab should look something like the following:

The screenshot shows the 'Basic Description' tab for a resource titled 'Melinda Hayes Papers' with Resource Identifier '0999'. The interface includes a left sidebar with a tree view showing '0999: Melinda Hayes Papers' and 'Correspondence'. The main area contains several input fields: 'Level' (file), 'Persistent ID' (ref8), 'Component Unique Identifier', 'Extent' (Extent Number), 'Container Summary', 'Date Expression', 'Date' (Date Begin: 1985, Date End: 1990), 'Bulk Dates', 'Language Code', and 'Repository Processing Note'. The 'Instances' section shows a table with one instance: 'Textual materials' with 'Instance Type' 'Textual materials' and 'Instance Label' 'Box 1 / Folder 1'. The bottom of the window features a toolbar with buttons for 'Add Child', 'Add Sibling', 'Rapid Data Entry', 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD', 'Export MARC', 'Export Cont. Labels', 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', and 'Save'. The status bar at the bottom indicates 'Created: Aug 18, 2010 by luftsche | Modified: Aug 18, 2010 by luftsche | Record Number: 992'.

Repeat this process for all series/folders/items you are describing.

## The Names & Subjects tab

Your resource record should already contain some preliminary names/subjects/genres, etc., but you will undoubtedly have additional information to add.

Before you proceed, make sure you have the collection name highlighted in the left column; this will ensure that the information you add to your record applies to the collection rather than to an individual item. Then click on the Names & Subjects tab.

To add additional names to your record, click on the “Add Name Link” button. This brings up the “Name Lookup” box.

The screenshot displays the 'Resources' interface for 'Melinda Hayes Papers'. The 'Names & Subjects' tab is active. The 'Names' section contains a table with one entry: 'Hayes, Melinda, 1965-' with the role 'Creator'. Below the table are buttons for 'Edit Name Link', 'Add Name Link', and 'Remove Name Link'. The 'Subjects' section lists 'Correspondence', 'Dance', and 'Vampires in literature'. At the bottom, there are buttons for 'Add Subject Link' and 'Remove Subject Link'. A red arrow points to the 'Add Name Link' button.

Name	Name Link Function	Name Link Creator / Subject Role
Hayes, Melinda, 1965-	Creator	

Buttons: Edit Name Link, Add Name Link, Remove Name Link

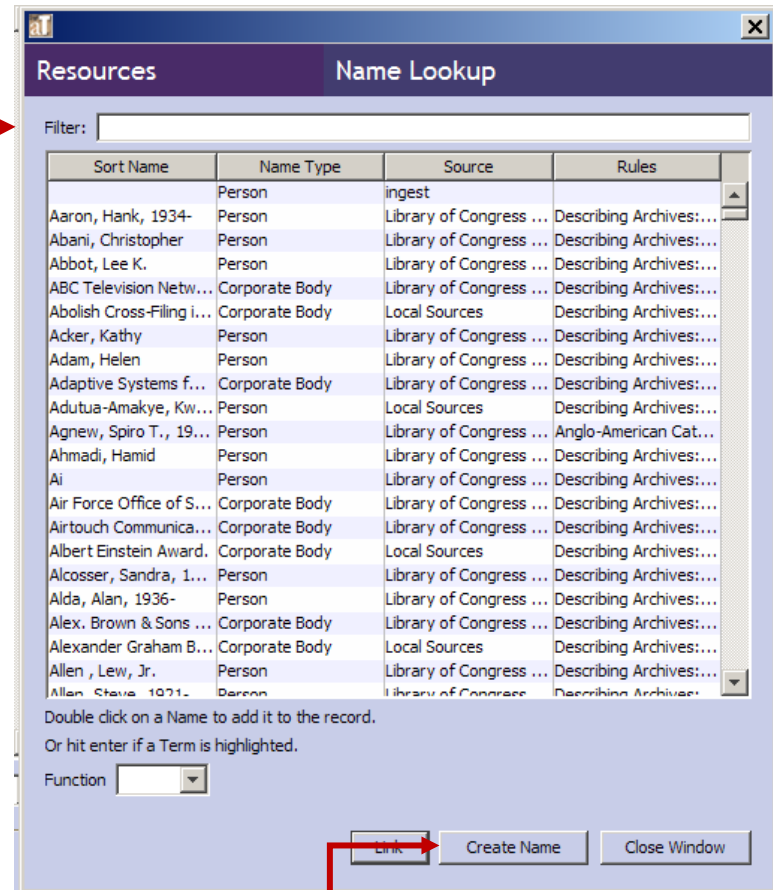
Subjects: Correspondence, Dance, Vampires in literature

Buttons: Add Subject Link, Remove Subject Link

Footer: Created: Aug 18, 2010 by luftsche | Modified: Aug 18, 2010 by luftsche | Record Number: 992

First check to make sure the name you wish to link to the record is new.  
Do this by searching for it using the Filter.

If the name is available, double clicking on it will automatically link it to the record. Once it is linked, you can double click on it in the main Names & Subjects tab in order to assign it a role (creator or subject).



If the name you wish to link is not already available in AT, please click the Create Name button to begin the process of entering the name you wish to link. You will be prompted to make a selection from a drop down menu:

Resources Name Lookup

Filter:

Sort Name	Name Type	Source	Rules
Aaron, Hank, 1934-	Person	Library of Congress ...	Describing Archives:...
Abani, Christopher	Person	Library of Congress ...	Describing Archives:...
Abbot, Lee K.	Person	Library of Congress ...	Describing Archives:...
ABC Television Netw...	Corporate Body	Library of Congress ...	Describing Archives:...
Abolish Cross-Filing i...	Corporate Body	Local Sources	Describing Archives:...
Acker, Kathy	Person	Library of Congress ...	Describing Archives:...
Adam, Helen	Person	Library of Congress ...	Describing Archives:...
Adaptive System	Person	Library of Congress ...	Describing Archives:...
Adutua-Amakye	Person	Library of Congress ...	Describing Archives:...
Agnew, Spiro T.	Person	Library of Congress ...	Describing Archives:...
Ahmadi, Hamid	Person	Library of Congress ...	Describing Archives:...
Ai	Person	Library of Congress ...	Describing Archives:...
Air Force Office	Corporate Body	Library of Congress ...	Describing Archives:...
Airtouch Commu	Family	Library of Congress ...	Describing Archives:...
Albert Einstein Award.	Corporate Body	Local Sources	Describing Archives:...
Alcosser, Sandra, 1...	Person	Library of Congress ...	Describing Archives:...
Alda, Alan, 1936-	Person	Library of Congress ...	Describing Archives:...
Alex. Brown & Sons ...	Corporate Body	Library of Congress ...	Describing Archives:...
Alexander Graham B...	Corporate Body	Local Sources	Describing Archives:...
Allen, Lew, Jr.	Person	Library of Congress ...	Describing Archives:...
Allen, Steve, 1971-	Person	Library of Congress ...	Describing Archives:...

Double click on a Name to add it to the record.  
Or hit enter if a Term is highlighted.

Function

Link Create Name Close Window

Names

Details Non-Preferred Forms, Accessions, Resources & Digital Objects Contact Info

Name Identity Record: Person

Prefix

Dates

Primary Name

Qualifier

Rest of Name

Fuller Form

Title

Source

Suffix

Rules

Number

Direct Order

Sort Name   Create Sort Name Automatically

Description Type

Description Note

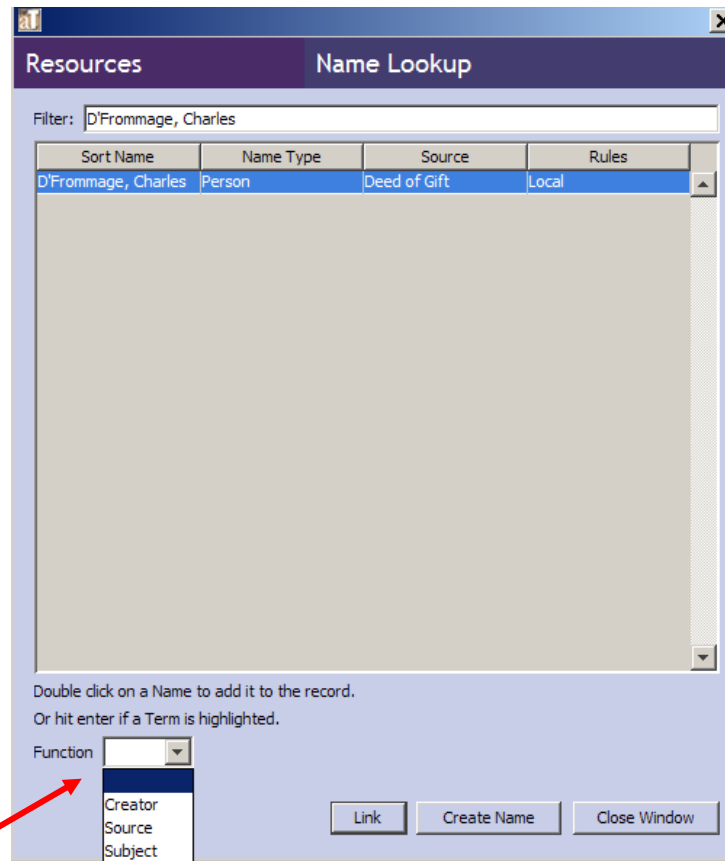
Citation

First Previous Next Last Reports Cancel OK

Choose the appropriate entry and click "Ok". A new dialogue box will appear, for Persons, Corporate Body, or Family. This example is for a personal name.

Please fill in the fields accordingly. First, determine if the name exists in the Library of Congress Name Authority File (LCNAF); if so, indicate that as the Source. If not, format the name according to AACR2, DACS, or a local source (the collection itself or the deed of gift, for example). AT requires you to choose a Source and a set of Rules in order to save the record. The guidelines for formatting names in DACS can be found in [Part III, Forms of Names](#), and are based on the rules established in AACR2.

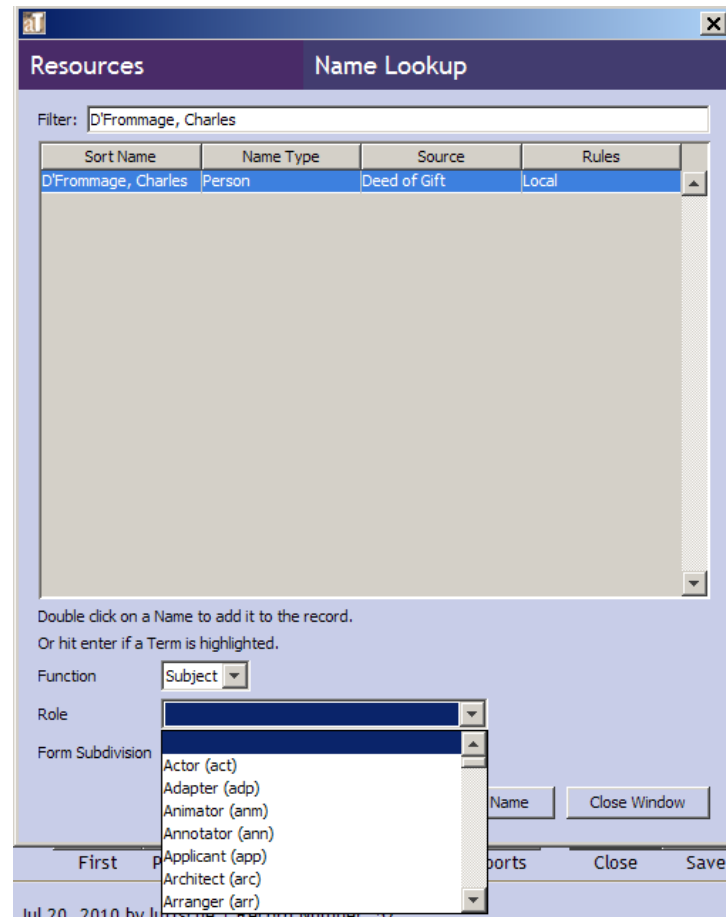
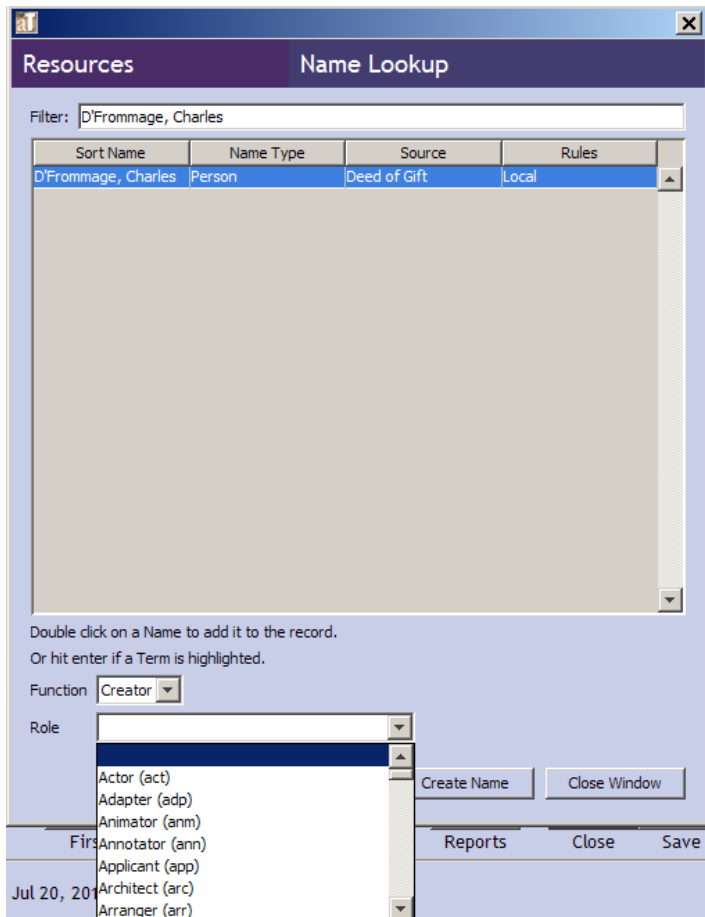
Once you have filled in the required fields, click “Ok”. You will see the name you created highlighted.



Click on the Function drop down list to select the appropriate function: Creator, Source or Subject. AT inserts these names into the Controlled Access Headings section of the finding aid, so Source may not be an appropriate function for discoverability. The source of the collection will be indicated in the “Immediate Source of Acquisition Note,” therefore restrict your choices to Creator or Subject.



When you choose Creator or Subject, you will be prompted to choose specific roles. For Creator, this is not required. If you choose Subject, you will also be prompted to choose a Form subdivision. Choose the appropriate form, generally “Archives”, but you may want to use “Correspondence”, “Photographs” or one of the other available options. To finish, click on the Link button, and your name will appear in the Names section of the Names & Subject tab.



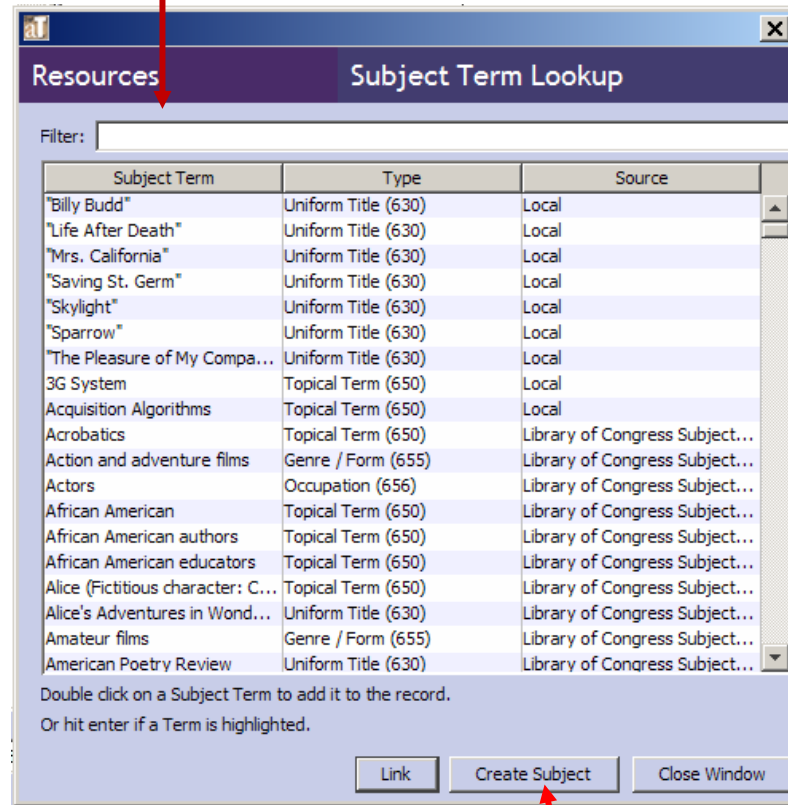
For more information on these processes, see the [chapter 11](#) and [chapter 12](#) of the Archivists Toolkit manual.

To add additional subjects to your record, click on the “Add Subject Link” button. Make sure that the title of the collection is highlighted on the left hand side of your screen before you add additional subjects.

The screenshot shows a web-based interface for managing a record titled "Melinda Hayes Papers". The interface is divided into several sections:

- Left Panel:** A tree view showing the record structure. The "0999: Melinda Hayes Papers" folder is selected and highlighted in blue. Underneath it, a "Correspondence" folder is visible with a sub-item "A".
- Top Bar:** Displays the record title "Title: Melinda Hayes Papers" and a "Resource Identifier:" field.
- Navigation Tabs:** Includes "Basic Description", "Names & Subjects", "Notes Etc. & Deaccessions", and "Finding Aid Data". The "Names & Subjects" tab is active.
- Names Section:** A table with columns "Name", "Name Link Function", and "Name Link Creator / Subject Role". One entry is visible: "Hayes, Melinda, 1965-" with the function "Creator". Below the table are buttons for "Edit Name Link", "Add Name Link", and "Remove Name Link".
- Subjects Section:** A table with a "Subject" column. Three subjects are listed: "Correspondence", "Dance", and "Vampires in literature".
- Action Buttons:** At the bottom of the main content area, there are buttons for "Add Subject Link" and "Remove Subject Link". A red arrow points from the text above to the "Add Subject Link" button.
- Footer Bar:** Contains various utility buttons: "Add Child", "Add Sibling", "Rapid Data Entry" (dropdown), "Delete Component", "Transfer", "Manage Locations", "Export EAD", "Export MARC", and "Export Co La". Below these are navigation buttons: "First", "Previous", "Next", "Last", "Reports", "Close", and "Save".
- Metadata:** At the very bottom, it states "Created: Aug 18, 2010 by luftsche | Modified: Aug 19, 2010 by luftsche | Record Number: 992".

This brings up the Subject Term Lookup box. AT already contains many subjects and genres. First, perform a search to see if an appropriate heading already exists in AT. Begin typing your heading in the Filter box at the top of the screen to determine if an appropriate heading already exists. If it does, double click on it and AT will link it to the record.



If no appropriate headings exist in AT, you must create one. To do this, click on the "Create Subject" button.

You will see this screen:

**Subjects**

Subject Term

Type

Source

Scope Note

**Accessions**

Accession Number ▲	Title	Extent Number	Extent Measurement

**Resources**

Title	Extent Number	Resource Id	Extent Measurement	Resource Identifier ▲

Resources in Red have the subject term linked at the component level

**Digital Objects**

Title	Object Type	Date

First Previous Next Last Reports Cancel OK

Using an appropriate and established thesaurus (e.g., LCSH, AAT, TGM, MESH, TGN, etc.) enter your subject term in the Subject Term field. DACS provides a list of the most commonly accepted content standards and thesauri for describing archival materials (see [Appendix B, Companion Standards](#)). If you are comfortable creating structured subject headings (i.e., you have cataloging experience), you may

construct structured subject headings; use -- (two dashes) to separate the heading and subfields. If not, the Library of Congress Classification Web provides structured subject headings which you can use. Once you have entered your heading, you must then select its type from the drop down menu [Function (657); Genre/Form (655); Geographic Name (651); Occupation (656); Topical Term (650); or Uniform Title (630)]. You must then identify the source (the thesaurus that provided the term). If the term does not exist in one of the established thesauri, indicate "local" as the source. Once you click "OK" the term is automatically linked to your record.

After you have entered additional names and subjects, they will be reflected in the Names & Subjects tab. You may enter as many names and subjects as needed to accurately describe and create access to your collection. These access points are a requirement for all levels of description as outlined in DACS; OAC requires a minimum of three, which can be a combined total of names, subjects, genres, etc.

**Resources** Record

Title: Melinda Hayes Papers Resource Identifier:

0999: Melinda Hayes Papers  
Correspondence  
A

Basic Description | **Names & Subjects** | Notes Etc. & Deaccessions | Finding Aid Data

**Names**

Name	Name Link Function	Name Link Creator / Subject Role
D'Frommage, Charles	Subject	Actor (act)
Hayes, Melinda, 1965-	Creator	

Edit Name Link | Add Name Link | Remove Name Link

**Subjects**

Subject

- Clothing
- Correspondence
- Dance
- Dances
- Jacob's Pillow Dance Festival
- Modern dance
- Photographs
- Vampires in literature

Add Subject Link | Remove Subject Link

Add Child | Add Sibling | Rapid Data Entry | Delete Component | Transfer | Manage Locations | Export EAD | Export MARC | Ex Co Lal

First | Previous | Next | Last | Reports | Close | Save

Created: Aug 18, 2010 by luftsche | Modified: Aug 19, 2010 by luftsche | Record Number: 992

## The Notes Etc. & Deaccessions tab

Your resource record should already contain a number of notes; what you see in the record are those that are required for the creation of a basic resource record and were created at the time the collection's accession record was created.

The screenshot displays the 'Resources' interface for the record '0999: Melinda Hayes Papers'. The 'Notes Etc. & Deaccessions' tab is active, showing a table of notes and a section for deaccessions.

**Notes etc. Table:**

Type	Title	Content
Abstract	Abstract	Correspondence, subject files, photographs, and
Conditions Governing Access	Conditions Governing Access	COLLECTION STORED OFF-SITE: Advance notice
Conditions Governing Use	Conditions Governing Use	None.
Immediate Source of Acquisition note	Acquisition	Gift of Melinda Hayes, 2010.
Preferred Citation	Preferred Citation	[Box/folder# or item name], Melinda Hayes Paper

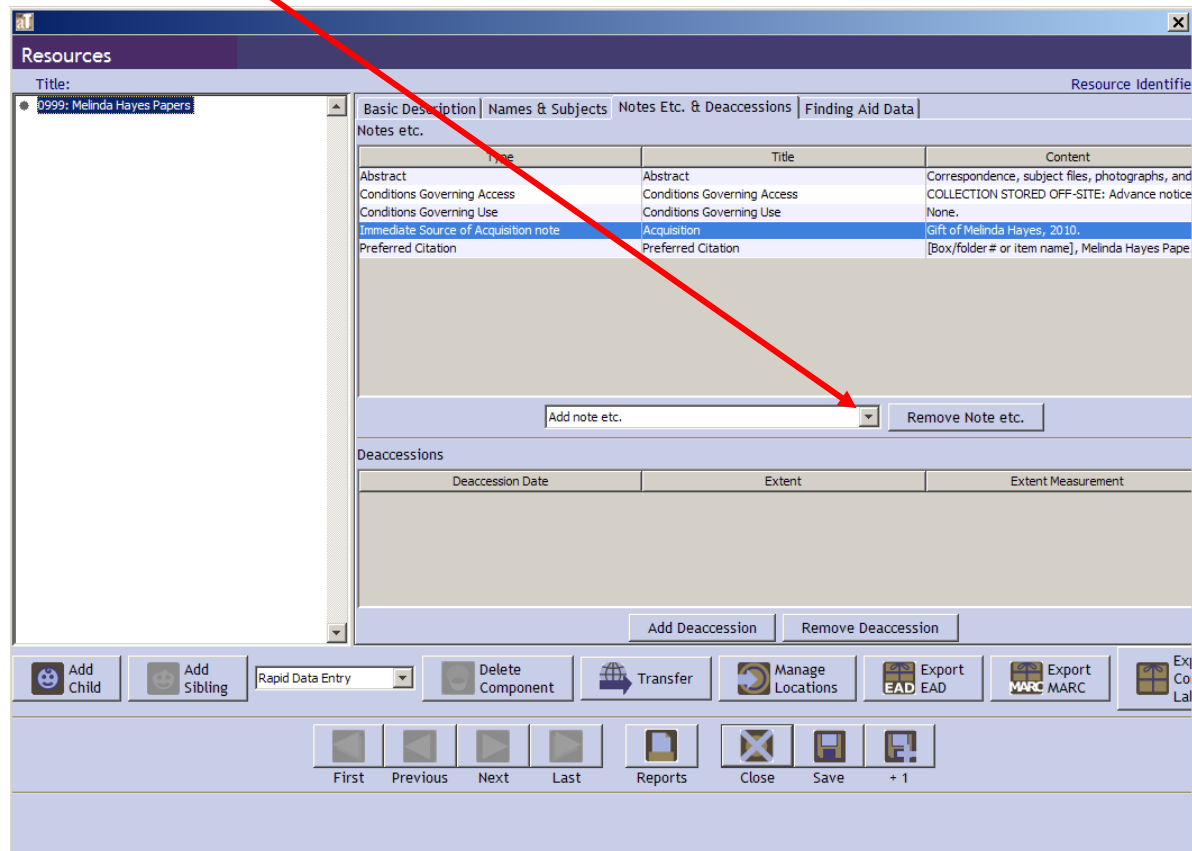
**Deaccessions Table:**

Deaccession Date	Extent	Extent Measurement

The interface includes a sidebar with the resource title, a top navigation bar with tabs (Basic Description, Names & Subjects, Notes Etc. & Deaccessions, Finding Aid Data), and a bottom toolbar with various actions like 'Add Child', 'Add Sibling', 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD', 'Export MARC', 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', 'Save', and '+ 1'.

You will be adding additional notes that are required by OAC best practices and recommended for optimal description by DACS. These are the Scope and Content note and the Biographical/Historical note. It is also recommended that you include an Arrangement (or organization) note. Please refer to [DACs Chapter 3](#) for information on writing scope and content notes and arrangement/organization notes, and [DACs Chapter 2, Section 7](#) for biographical and administrative history notes. Please remember to add the appropriate note title to the latter two notes—for biographical information on a person or family, title the note “Biographical Note”; for historical information on a corporate body, title the note “Historical Note”; for collections organized by the processor into series, use “Organization”; for collections that maintain their original order with no applied organization (ie, without series), use “Arrangement”.

Click on the “Add Note” drop down list.





Scroll down and select the note you wish to add.

The screenshot shows the 'Resources' interface for the 'Melinda Hayes Papers' record. The left sidebar shows a tree view with '0999: Melinda Hayes Papers' expanded to 'Correspondence' and then 'A'. The main area has tabs for 'Basic Description', 'Names & Subjects', 'Notes Etc. & Deaccessions', and 'Finding Aid Data'. The 'Notes etc.' tab is active, displaying a table with columns for Type, Title, and Content.

Type	Title	Content
Abstract	Abstract	Correspondence, subject files, photographs, and
Conditions Governing Access	Conditions Governing Access	COLLECTION STORED OFF-SITE: Advance notice
Conditions Governing Use	Conditions Governing Use	None.
Immediate Source of Acquisition note	Acquisition	Gift of Melinda Hayes, 2010.
Preferred Citation	Preferred Citation	[Box/folder # or item name], Melinda Hayes Pape
Scope and Contents	Scope and Content	The Melinda Hayes Papers, 1981-2010, contains

Below the table, a dropdown menu is open, showing options for adding a new note: 'Add note etc.', 'Abstract', 'Accruals note', 'Appraisal note', 'Arrangement', 'Bibliography', 'Biographical/Historical note', and 'Conditions Governing Access'. A 'Remove Note etc.' button is also visible.

The bottom of the interface features a toolbar with buttons for 'Add Child', 'Add Sibling', 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD', 'Export MARC', and 'Export Co La'. Navigation buttons for 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', and 'Save' are also present.

At the bottom, the record information is displayed: 'Created: Aug 18, 2010 by luftsche | Modified: Aug 19, 2010 by luftsche | Record Number: 992'.

A template will appear. Enter your information. You may return and edit this note (and all notes) at any time.

The screenshot shows a software window titled "Notes" with a "Resources" tab. The window contains the following elements:

- Checkboxes for "Internal Only" and "Multi-part".
- A "Type" dropdown menu currently set to "Scope and Contents".
- A "Note Label" text field containing "Scope and Content".
- A large "Note Content" text area for entering the note's text.
- A "Wrap in tag..." dropdown menu at the bottom left.
- Navigation buttons: "First", "Previous", "Next", and "Last".
- Action buttons: "Cancel" and "OK".

Click "OK" to save your work.

When you have completed creating your notes, your Notes Etc. & Deaccessions screen should look like the following:

The screenshot shows the 'Resources' interface for 'Melinda Hayes Papers'. The 'Notes Etc. & Deaccessions' tab is active. The 'Notes etc.' section contains a table with the following data:

Type	Title	Content
Abstract	Abstract	Correspondence, subject files, photographs, and...
Conditions Governing Access	Conditions Governing Access	COLLECTION STORED OFF-SITE: Advance notice...
Conditions Governing Use	Conditions Governing Use	None.
Immediate Source of Acquisition note	Acquisition	Gift of Melinda Hayes, 2010.
Preferred Citation	Preferred Citation	[Box/folder # or item name], Melinda Hayes Pape...
Scope and Contents	Scope and Content	The Melinda Hayes Papers, 1981-2010, contains ...
Biographical/Historical note	Biographical Note	Melinda Hayes was born in Los Angeles, Californi...
Arrangement	Organization	The collection is organized by series: Series I. Co...

Below the notes table is an 'Add note etc.' dropdown menu and a 'Remove Note etc.' button. The 'Deaccessions' section is currently empty, with columns for 'Deaccession Date', 'Extent', and 'Extent Measurement'. Below this are 'Add Deaccession' and 'Remove Deaccession' buttons. The interface also features a toolbar with buttons for 'Add Child', 'Add Sibling', 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD', 'Export MARC', and 'Export Cont. Labels'. At the bottom, there are navigation buttons for 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', and 'Save'. The footer indicates the record was created on Aug 18, 2010, and modified on Aug 19, 2010, with a record number of 992.

You may also find it necessary to create notes for technical requirements, separated material, other finding aids, related collections, etc.

## The Finding Aid Data tab

The Finding Aid Data tab contains the fields in which you will enter much of the administrative information that will appear in the front matter of your finding aid. Some of that information has already been entered at the time of the resource record's creation. You will add the finding aid title, change the finding aid date to the date of publication, add your name as author (and anyone else's who assisted you), indicate the description rules used (DACS), indicate the language of the finding aid (if not English), change the status when you are ready to publish, and enter any additional information that is necessary (such as a sponsor note acknowledging grant support, if appropriate).

The screenshot displays the 'Finding Aid Data' tab in a web application. The interface is organized into several sections:

- Left Sidebar:** A tree view showing the resource hierarchy. The selected item is '0999: Melinda Hayes papers', which is under the 'Correspondence' folder.
- Top Tabs:** The 'Finding Aid Data' tab is active, with other tabs like 'Basic Description', 'Names & Subjects', and 'Notes Etc. & Deaccessions' visible.
- Main Form Area:**
  - Left Column:**
    - EAD FA Unique Identifier: [Empty text box]
    - EAD FA Location: [Empty text box]
    - Finding Aid Title: [Dropdown menu with 'Finding aid for the Melinda Hayes papers' selected]
    - Finding Aid Subtitle: [Empty text box]
    - Finding Aid Filing Title: [Dropdown menu with 'Hayes (Melinda) papers' selected]
    - Finding Aid Date: [Text box with '2010 September' entered]
    - Author: [Text box with 'Sue Luftschein' entered]
    - Description Rules: [Dropdown menu with 'Describing Archives:...ard (dacs)' selected]
    - Language of Finding Aid: [Empty text box]
  - Right Column:**
    - Sponsor Note: [Empty text box]
    - Edition Statement: [Empty text box]
    - Series: [Empty text box]
    - Revision Date: [Empty text box]
    - Revision Description: [Empty text box]
    - Finding Aid Status: [Dropdown menu with 'publish\_basic' selected]
    - Finding Aid Note: [Empty text box]
- Bottom Toolbar:** A row of buttons for navigation and actions: 'Add Child', 'Add Sibling', 'Rapid Data Entry', 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD EAD', 'Export MARC MARC', 'Export Cont. Labels', 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', 'Save', and '+1'.

The screenshot shows the 'Resources' window in the USC Libraries system. The 'Finding Aid Data' tab is active. The left sidebar shows a tree view with '0999: Melinda Hayes papers' selected. The main area contains several input fields and dropdown menus. Red arrows from the left point to the following fields:

- Finding aid title:** Points to the 'Finding Aid Title' field, which contains 'Finding aid for the Melinda Hayes papers'.
- Finding aid (publication) date:** Points to the 'Finding Aid Date' field, which contains '2010 September'.
- Author:** Points to the 'Author' field, which contains 'Sue Luftschein'.
- Description rules:** Points to the 'Description Rules' dropdown menu, which is set to 'Describing Archives:...ard (dacs)'.
- Finding aid status:** Points to the 'Finding Aid Status' dropdown menu, which is set to 'publish\_basic'.

Other visible fields include 'EAD FA Unique Identifier', 'EAD FA Location', 'Finding Aid Subtitle', 'Finding Aid Filing Title' (Hayes (Melinda) papers), 'Sponsor Note', 'Edition Statement', 'Series', 'Revision Date', 'Revision Description', and 'Finding Aid Note'. The bottom toolbar contains buttons for 'Add Child', 'Add Sibling', 'Rapid Data Entry', 'Delete Component', 'Transfer', 'Manage Locations', 'Export EAD', 'Export MARC', 'Export Cont. Labels', 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', 'Save', and '+ 1'.

Click "Save" to save your work.

Once you have filled in all information, set your finding aid status to publish\_basic and inform the Data and Processing Archivist that your finding aid is ready to go. The DPA will review the metadata and controlled access terms, set the status to publish\_final, create a collection level MARC record, and upload your finding aid to the OAC. It will also appear on the USC Libraries website as soon as these steps are completed.