

Mount Saint Mary's University (Los Angeles, Calif.).

12001 Chalon Rd.

Los Angeles, CA 90049

(310) 954-4000

**Procedure Manual
for
Cuadra Star Knowledge Center for Archives**

Document Number:	
Revision Number:	1.1
Date:	March 21, 2015

Document Approvals:

Victoria McCargar Archivist Charles Willard Coe Memorial Library, MSMU	<hr/> Signature	<hr/> Date

Revision History

<u>Revision</u>	<u>Date</u>	<u>Author</u>	<u>Description</u>
Draft	05/14/2014	N. Steinmann	First draft
Revisions	03/20/2015	N. Steinmann	Minor revisions for institution name change

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1. Introduction

This document outlines requirements and procedures for the use of Cuadra Star Knowledge Center for Archives (SKCA) software by Mount Saint Mary's University Los Angeles, California (MSMU). Cuadra SKCA is a product of Cuadra Associates, Inc. (Los Angeles, California), a subsidiary of Lucidea (lucidea.com), headquartered in Richmond, BC, Canada.

Cuadra SKCA software assists archives to accession, catalog and manage collections. It makes catalogs of the collections (“finding aids”) visible on the Internet via a secure public access module. The software can generate finding aids in Encoded Archival Description (EAD), an archival standard based on Extensible Markup Language (XML).

It should be noted that this document does not describe all of the functionality of the Cuadra SKCA software, only portions used by MSMU. For a complete description of all functionality of Cuadra SKCA, see the Cuadra SKCA v. 2.5 manuals.

1.1 Document Overview

- Section 1, Introduction, describes this document.
- Section 2, Requirements & Standards, describes standards governing MSMU’s use of Cuadra SKCA and requirements for data entry.
- Section 3, Workflow, describes the MSMU workflow for cataloging a collection in Cuadra SKCA.
- Section 4, Users and Security, describes user access levels, how to create users, and how to log in and out of Cuadra SKCA software.
- Section 5, Accessions, describes MSMU’s use of the Cuadra SKCA Accessions module.
- Section 6 describes how to create and maintain Catalog Records for a collection in Cuadra SKCA.
- Section 7 describes how to create and maintain authority and drop list values in Cuadra SKCA.
- Section 8 describes MSMU’s use of reporting in Cuadra SKCA.
- Section 9 describes MSMU’s exception procedures in case of inavailability of the software.
- Appendix A describes MSMU static text used in Cuadra SKCA records.
- Appendix B describes the methodology of location numbering at MSMU and its implementaiton in Cuadra SKCA.
- Appendix C describes MSMU’s standards for name authority abbreviations.
- Appendix D describes MSMU’s use of high-level subject categories or facets to intellectually group collections.

1.2 References

The following documents and standards are referenced (by Code) in these procedures:

Document Name / URL	Revision	Code
APA citation style guidelines (http://www.apastyle.org/ OR https://owl.english.purdue.edu/owl/resource/560/01/)	APA Style Guide 6 th edition	APA1
Archive Builders: Archival analog and digital measurement equivalents (www.archivebuilders.com)	2009	AB
Cuadra SKCA Manuals	2.5	SKCAM
Describing Archives: A Content Standard (DACS), Society of American Archivists (http://files.archivists.org/pubs/DACS2E-2013.pdf)	2nd ed., 2013	DACS
Dublin Core Metadata Initiative – User Guide - Metadata Element Set (http://dublincore.org/documents/dces/)	v. 1.1 2012	DCMI1
Using Dublin Core – The Elements (DCMI2) http://dublincore.org/documents/usageguide/elements.shtml	2005	DCMI2
Guidelines for Encoding Bibliographic Citation Information in Dublin Core Metadata (DCMI3) http://dublincore.org/documents/dc-citation-guidelines/	2005-06-03	DMCI3
Encoded Archival Description (EAD), Library of Congress (http://www.loc.gov/ead/)	2002	EAD
Getty Thesaurus of Geographic Names ® Online http://www.getty.edu/research/tools/vocabularies/tgn/	2000	GETTY
ISO 639.2 Codes for the Representation of Names of Languages http://www.loc.gov/standards/iso639-2/php/code_list.php	2014	ISO
Library of Congress Authorities Online Catalog (http://authorities.loc.gov/)	current	LCSH
MSMU Spreadsheets, Master Lists and Templates (sharedrive\Library\ArchiveZ\CuadraSKCA\MasterLists&Templates)	Various	n/a
Tennessee State Library and Archives: Tables of cubic-foot equivalents for archival containers http://www.tennessee.gov/tsla/aps/tama/tama02containers.pdf	1999	TENN
Yale University Linear Footage Calculator (http://www.library.yale.edu/beinecke/manuscript/process/lconv.htm)	1997	YALE

1.3 Definitions & Acronyms

1.3.1 Definitions

box	A square or rectangular rigid container used to store archival files or items. Boxes larger than a standard Hollinger box are called <i>oversized</i> boxes (see Hollinger box).
collection	A group of materials with some unifying characteristic <i>or</i> materials assembled by a person, organization, or repository from a variety of sources; an artificial collection.
finding aid	A full description of a collection (catalog) in Cuadra SKCA. In the web interface, the finding aid is displayed as verbose text with an expandable tree showing description levels. Does not contain the same information as Hierarchy. Can be saved by users in EAD format.
file	A group of documents related by use or topic, typically housed in a folder (or a group of folders for a large file).
hierarchy	In catalog records in Cuadra SKCA, an expandable display of the collection levels (collection, series, file, item, etc.). Does not contain same information as Finding Aid.
Hollinger box	A Hollinger box (also known as a “document box” or “archives box” is a specially constructed acid-free box with metal edges used in archives for the preservation of documents and photographs. The term comes from the manufacturer Hollinger Metal Edge company, but any similar box can be called a “Hollinger box”. A standard Hollinger box is 10 inches high, 12 or 15 inches wide and 6 or 3 inches deep, and has a hinged lid.
ISBN	International Standard Book Number; a 13-digit number assigned by standard book numbering agencies to control and facilitate activities within the publishing industry. ISBNs used to be 10 digits until the end of 2006.
ISSN	International Standard Serial Number; a unique eight-digit number used to identify a periodical publication at a specific media type.
item	The smallest archival unit. A thing that can be distinguished from a group and that is complete in itself. A letter, for example, may have several pages but is treated as a single item because of its content. A photograph album may be considered an item, but so may each photograph in the album.
oversize	Any box larger than a standard Hollinger box, or any material in archives that is too large to fit in such a box.
radio button	A small round button in a software application that lets you choose one value among a list of values (Ⓒ).
series	A group of similar records that are arranged according to a filing system and that are related as the result of being created, received, or used in the

same activity

1.3.2 Acronyms

APA	American Psychological Association
ASCII	American Standard Code for Information Interchange
DACS	Describing Archives: A Content Standard
DCMI	Dublin Core Metadata Initiative
EAD	Encoded Archival Description
ISBN	International Standard Book Number
ISSN	International Standard Serial Number
LCSH	Library of Congress Subject Headings (Authorities)
MSMU	Mount Saint Mary's University (Los Angeles, Calif.).
SKCA	Cuadra Star Knowledge Center for Archives software
URL	Uniform Resource Locator
XML	Extensible Markup Language
XSLT	Extensible Stylesheet Language Transformations

2. Requirements & Standards

2.1 Use of Standards

The following standards apply to MSMU's use of Cuadra SKCA. In this manual, applicable standards are referenced in italics, showing the chapter or section reference where used. Any deviations from standards are noted as necessary.

2.1.1 *APA (Bibliographic Reference Style)*

Printed materials catalogued in Cuadra SKCA may need to include metadata representing a bibliographic reference in the American Psychological Association bibliographic citation format.

2.1.2 *DACS*

All MSMU procedures for the use of Cuadra SKCA adhere to the Describing Archives: A Content Standard (DACS), 2nd edition, standard for description of archival materials from the Society of American Archivists.

2.1.3 *Dublin Core Metadata Initiative*

Some item level records in the MSMU implementation of Cuadra SKCA include bibliographic citation information conforming to the Dublin Core Metadata Initiative supervised by the Association for Information Science and Technology.

2.1.4 *EAD*

All MSMU finding aids will be made available in Encoded Archival Description (EAD) format.

Encoded Archival Description (EAD) is an XML standard for encoding archival finding aids, maintained by the Technical Subcommittee for Encoded Archival Description of the Society of American Archivists, in partnership with the Library of Congress. EAD files have an extension of ".xml" like other XML files, and can be created in any text editor manually. They can be read with most web browsers. However, a style sheet (either a Cascading Style Sheet in .CSS format or an XML stylesheet transformation in .XSLT format) is required to control the layout of the information of the file in the web browser display.

Creating file in EAD format allows sharing finding aids with other institutions or union library/archives catalogs. Menu functions in Cuadra SKCA allow automatic generation of EAD finding aids from the catalog records. These generated EAD files are stored in one of three locations: on the Cuadra SKCA host server, on the Cuadra Star Web site for MSMU, or on a local MSMU server. As of this writing, all MSMU EAD finding aids created in Cuadra SKCA are stored in separate files on the Cuadra SKCA web site, because that option allows files to be named individually (see section 6.7 Defining and Creating EAD Finding Aids for Collections for more information).

2.1.5 LCSH

Library of Congress Subject / Name Heading records should be used for name authorities and subject headings if they are available. Any subjects that are not LCSH standard note this in the authority record.

2.2 Archival Arrangement & Description Requirements

Archival arrangement and description must follow specific guidelines to allow collections to be entered and tracked properly in Cuadra SKCA.

Cuadra SKCA contains the following possible record types in its hierarchical arrangement:

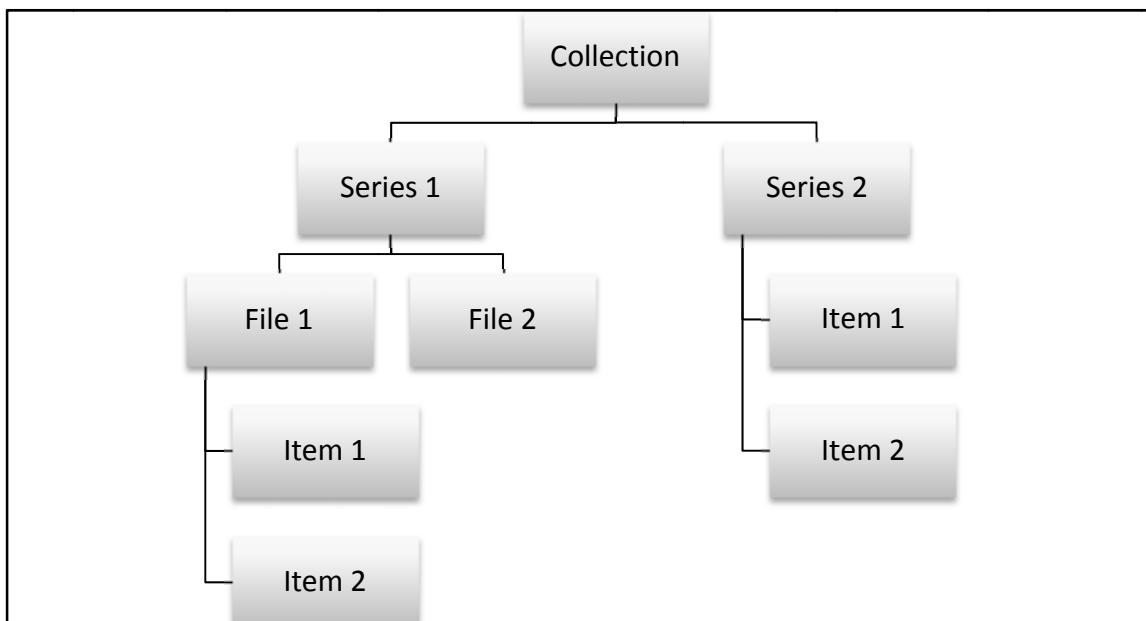
- collection: level 1 (“top” level record, e.g., collection, record group, agency, fonds)
- sub-collection: level 1 (subgroup, sub-subgroup)
- series: level 2 (series, subseries, sub-subseries)
- container: level 3 (box, envelope)
- files/items: level 4 (file, item)

MSMU does not use all of these record types for various reasons. See Figure 2-1: Example Collection Hierarchy for an example of a collection hierarchy using these levels.

2.2.1 MSMU General Strategy for Cataloging Collections

- Each collection will have a Collection record (level 1), one or more Series records (level 2), one or more File records (level 4) for each series, and possibly one or more Item records (level 4) for each file.
- Series records should be created as children of Collection records.
- File record type (level 4) will be used for individual file folders, envelopes containing other items, etc. Each File record should be created as a child of a Series record.
- Item record type (level 4) will be used for notable individual items such as scrapbooks, journals, theses, pamphlets, books, manuscripts or other documents that require special description elements or have copyright restrictions, material items, etc.
 - Do not catalog collections at Item level unless these special conditions apply.
 - Notable items should be listed in the Scope & Contents section for each series.
 - Item records may be created as children of a File record OR Series record (if a series contains only items such as scrapbooks or special collections books instead of files).

Figure 2-1: Example Collection Hierarchy



2.2.2 MSMU Strategy for Boxes in Collections

The general strategy used by MSMU is to NOT record boxes as separate records in Cuadra SKCA. This allows more than one Series record in Cuadra to reside in a single box. Because Series and Subseries records (level 2) in Cuadra SKCA are assigned a higher level in the hierarchical arrangement than Box records (level 3), if Box records were included in Cuadra only one Series or Subseries could reside in a box. Collections should be intellectually arranged to match these requirements.

To achieve this strategy:

- No box records are created in Cuadra SKCA.
- Box numbers in which series / files are stored will be recorded in the File or Item records that are inside the box.
- A Box List showing each box and series / files / items (as necessary) inside the box will be entered into the Scope & Contents section of the Collection record. The list will include all boxes of all sizes.
- Locations of all boxes will be stored in the Collection level Location Notes field. (See section 6.1.14 Cataloging a Collection – Location - Assigned Location field for more detail.)
- **Sub-Collections.** No need to use these elements has been identified.

2.2.3 Restricted Elements

The following record types and elements should NOT be used in Cuadra SKCA due to the MSMU strategy described above:

- **Non-hierarchical boxes.** Cuadra SKCA cannot auto-number records across non-hierarchical boxes, and cannot report on them in ways meeting MSMU requirements in Inventory reports. If a larger container is needed for more than one small container (envelope, etc.), use a box labeled with the Facet as a holder. Each small container must still be labeled with its associated unique “Box” (small container) number as well as the holding large container number.
- **Folders.** Folders *or any other level 3 record type* should not be used. Use File (level 4) record type for manila folders, envelopes, etc. that contain multiple items inside drawers or boxes.

2.3 Labeling

2.3.1 File Labeling

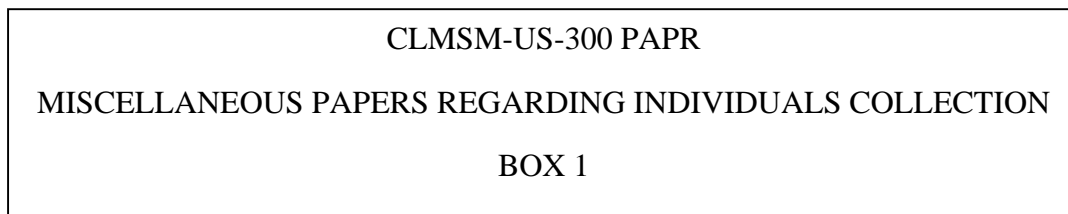
- Label files with the collection number (ex: CLMSM-US-999).
- Create file labels on clear archival label tape with black letters using the label making machine. Do not hand write labels.

2.3.2 Box Labeling

See Figure 3-1: General Procedure for Cataloging a Collection in Cuadra SKCA for an example of box label text. Boxes should be labeled with:

- The collection number (ex: CLMSM-US-999).
- The collection facet. This is the Cross-Collection Category from the Cuadra SKCA Summaries & Subjects section; ex: “PAPR”. (See section 7.7.2 Cross Collection Categories and Appendix D Cross Collection Subject Categories for more information.)
- The box number within the collection (ex: Box 1).
- Any relevant dates for items for boxes containing only one item, e.g. scrapbook boxes (ex: Box 1 Scrapbook 1 1998-2004).

Figure 2-2: Example Box Label



2.4 Data Entry Requirements

The following requirements govern general data entry, abbreviations, naming conventions etc. Before attempting data entry in Cuadra SKCA, please read SKCA Manual 2.5 Part A Overview for a description of how to use Cuadra default data entry and search screens.

2.4.1 General Editing

- When editing any record, the name of the user shall be entered in the Management Notes area of the record. To autofill this value, type the short input name (from user record) into the “Added By” field and press tab. Date will be entered automatically.
- Data entry should be carefully checked for consistency (number of blank spaces, included or missing periods “.”, etc. Cuadra SKCA software sorts records in American Standard Code for Information Interchange (ASCII) order, so small data entry differences may sort differently. Users should check data carefully before contacting the software vendor about sorts that appear invalid.

2.4.2 Archival Description Naming Conventions

- Use industry standard terms when naming collections, series, folders, etc. Use “General Materials” instead of “Miscellaneous”, “Photographs” instead of “Pictures”, “Correspondence” instead of “Letters”, etc. See Cuadra media type authority list for acceptable media terms.
- Collections shall be named “Papers” (for personal materials), “Records of” (for institutional materials), or “Collection” (for topical aggregations). If they are collected by one individual about a second individual, they shall be named “<name1> Collection on <name2>” (DACs 2.3). Examples:
 - Personal materials: Frank Hamilton Spearman Papers
 - Department: Records of the Department of Biology
 - Institutional entity: Records of the Delta Tau Delta Fraternity Chapter OR Records of the Da Camera Society
 - Collected by archives concerning event: Bel Air Fire Collection
 - Collected by archives about a subject: MSMU Collection of Doheny History
- The first series and first file in a collection shall be named “General Records” to provide a holding area for small quantities of items not better arranged in their own series or file.

2.4.3 Abbreviations

- Use the symbol “&” instead of the word “and” anywhere it occurs, EXCEPT in URLs (links) or XML where it might be disallowed due to language requirements.

2.5 Unique Identifying Numbers

DACS requires a unique identifying number at each level of archival description (DACs 2.1). However, Cuadra SKCA auto-numbering simply uses sequential numbers, and does not append

numbers from various levels to the collection number to create a unique id for Series, Boxes, Files or items. To create unique IDs based on appending collection-series-box-file-item numbering, manual numbering would have to be used. This technique was considered too labor intensive for MSMU.

Because the unique internal record number from Cuadra SCKA is automatically stored in the ID field of the EAD finding aid, this ID was considered sufficient to meet the DACS requirement for Series, Files and Items. Collections will be given a manual unique number (see Collection Numbers below). Since Box records are not used, Box numbers will only reside in the File records stored within the box, and in the Box List in the Collection record Scope & Contents field.

2.5.1 Collection Numbers

DACS requires a reference code at the highest level of description that contains a repository identifier, country identifier, and a local identifier. Repository codes are assigned by the national organization responsible for these codes (in the U. S., Library of Congress). Collection numbers should consist of:

- The MSMU Repository code – “CLMSM”
- The country code – “US”
- The local code – a three digit number, left zero-filled, ex: “029”. This number will be sequentially assigned and is not meaningful in any way.
- Full collection numbers therefore appear in the format “CLMSM-US-999”, where “999” is the local code.

A master collection number list in an Excel spreadsheet shall be maintained in a shared archives area on the college servers in a folder named “CuadraSKCA\MasterLists&Templates”. This document shall be named “CuadraSKCA_CollectionNumbers.xlsx”.

2.6 Name Authorities and Subject Terms

Name Authority records are used in Catalog records as a source for owners, donors, creators, authors etc., as well as subject terms describing collection contents. Individual name authority records describe people; Corporate name authority records describe groups, institutions or organizations, such as college departments or offices (i.e. Office of the President), fraternal and cultural organizations (i.e. the Da Camera Society or Phi Kappa Gamma), grant authorizing agencies, etc. Note that a creator’s name may be different than a name as a subject (i.e. Bob Smith, creator could write about Mark Twain, the subject).

Subject terms can be individual or corporate names or topical terms. Topical terms describe the subject focus of a collection, and can contain geographic names and historical periods as well as a topic (i.e. “Art—19th Century—United States” or “Oil Exploration—California”).

2.6.1 Individual Name Authority Records

- Individual names should generally be entered as Name Authority records in Cuadra SKCA. While this may create more initial data entry, it allows Name Authority records to be available in reports. Individual Name authorities should be created for religious personnel, Mount administrators, faculty or staff, and known personages (politicians, actors, artists, authors, etc. for whom biographical information is readily available). However, individuals mentioned in collection materials that are a) not well known, b) do not have biographical information readily available, c) are unlikely to be searched for may be entered as Subject terms with a type of Name.
- When creating Name Authority records, use the form of the individuals name found in the Library of Congress Name or Subject Authorities (LCSH) if available (*LCSH*).
- If not found in LCSH, use the most commonly known name for the individual. For example, for religious personnel, use their religious name rather than baptismal name if the religious name was most commonly used at MSMU. Record baptismal name as an “alias” in Name Authority records. Because the style of religious names have changed over time, record all known aliases (e.g. “Sister Rebecca”, “Sister M. Rebecca Jones”, “Alicia Jane Jones”, etc.), as many forms may have been used in college publications. For historical secular individual names not found in LCSH, record most commonly used name or full name with birth name and married surname as the main name (e.g. “Susan Allison Jones Smith”. Include all other names known as aliases, including married name in the form of “Mrs./Mr. Spouse-name” as well as full name, any birth names, etc. for reference purposes, as historical publications may only refer to spouses as “Mrs./Mr. Spouse-name” (*LCSH*).
- Record the official names of religious personnel in Name authority records in the format Last Name, First Name, Middle Name or Initial, Religious Title (i.e. “Sister”, “Father”), Abbreviation of Order (i.e. “CSJ”), Birth Year-Death Year following the Library of Congress Name Authority standard (*LCSH*). If no Last Name is available, use the First and Middle names only. If other information (such as dates) is not available, omit it. For a religious title, use the last available title (i.e. Cardinal rather than Archbishop, Reverend Mother rather than Sister.) Examples:
 - Larkin, Miriam Therese, Sister, CSJ, 1930-2010
 - O'Reilly, James Donald, Monsignor, 1916-1978
 - Mary Therese, Sister, CSJ
- All other names shall follow Library of Congress naming standard: Last Name, First Name, Middle Name or Initial, Nickname (if commonly used), Birth Year-Death Year. Do not include academic titles such as “Dr.” or political titles (“President”), or suffixes such as “Jr.”, “Sr.”, or “III” (differentiation of individuals with same names is provided for in the LCSH via dates) (*LCSH*). Examples:
 - Doheny, Edward Laurence, 1856-1935

- Doheny, Edward Laurence “Ned”, 1893-1929 (Note that Ned was E.L. Doheny’s son, as might be supposed by the dates of his life.)
- Doheny, Estelle, 1875-1958 (Note this is the form found in LCSH authorities. Use this form rather than her full name “Carrie Estelle Betzold Doheny”.)

2.6.2 Corporate Name Authority Records

Corporate names are the names of companies, groups, departments, i.e. any name that is not a single individual. Note that in catalog records, Cuadra SKCA will only display the name entered into the “Name (Official Term Shown in Drop list)” field, not the name entered into the First Name, Last Name fields (however those fields may be shown in reports).

- Use the form of the corporate name found in the Library of Congress Name or Subject Authorities (LCSH) if available. (*LCSH*)
- For college departments or institutional groups as creators, use the form standard found in LCSH if available. Example: “José Drudis-Biada Art Gallery”. (*LCSH*)
- If LCSH format is not available for college departments or institutional groups, use format “College name. Department of <department name>” OR “College name. <entity name>”. Examples:
 - Mount Saint Mary’s University (Los Angeles, Calif.). Department of Art
 - Mount Saint Mary’s University (Los Angeles, Calif.). Housing Office
 - Mount Saint Mary’s University (Los Angeles, Calif.). Office of the Chancellor
 - Mount Saint Mary’s University (Los Angeles, Calif.). Mount Saint Mary’s University (Los Angeles, Calif.). Singers
- Do not enter separate corporate name authority records for obsolete names for MSMU departments. Instead, include the name as an alias in the record with the current name.
- For national or international professional or fraternal organizations, use name found in LCSH if available (*LCSH*). If a professional or fraternal organization only exists at MSMU, add the words “student chapter” (for professional organization) or “chapter” (for fraternal organizations) after the official name. This allows a distinction between locally established groups and outside groups. Examples:
 - National fraternity: Mount Saint Mary’s University (Los Angeles, Calif.). Alpha Mu Gamma Chapter
 - National professional association: Mount Saint Mary’s University (Los Angeles, Calif.). California Nursing Students’ Association Student Chapter
 - MSMU local fraternity: Mount Saint Mary’s University (Los Angeles, Calif.). Alpha Sigma Chi

2.6.3 Subject Terms

Subject terms are values used in catalog items to search for specific collections and collection materials.

Figure 2-3: LCSH Authorities Subject List Screen

The Library of Congress >> [Go to Library of Congress Online Catalog](#)

LIBRARY OF CONGRESS AUTHORITIES

Help New Search Search History Headings List Start Over

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

◀ Previous Next ▶

#	Bib Records	<i>select icon in first column to... View Authority Headings/References</i>	<u>Type of Heading</u>
1	269	Petroleum--Prospecting.	Library of Congress subject headings
2	1	Petroleum--Prospecting.	Faceted application of subject terminology
3	1	Petroleum--Prospecting.	LC Annotated Children's Catalog subject headings
4	1	Petroleum--Prospecting--Afghanistan--Maps.	Library of Congress subject headings
5	1	Petroleum--Prospecting--Africa.	Library of Congress subject headings
6	1	Petroleum--Prospecting--Africa, East--Congresses.	Library of Congress subject headings
7	1	Petroleum--Prospecting--Africa, North.	Library of Congress subject headings
8	1	Petroleum--Prospecting--Africa, North--Congresses.	Library of Congress subject headings

- When entering names in catalog records, Individual or corporate names used as subjects should be chosen from the Cuadra Name Authorities list using the Name drop list. However, individuals mentioned in collection materials that are a) not well known, b) do not have biographical information readily available, c) are unlikely to be searched for may be entered as Subject terms with a type of Name, in which case they are selected by using the down arrow () drop list.
- When entering Subjects in catalog record, Subjects must come from one of these two authority lists. **Do not** type in Subjects directly into the Subject text box. Always enter them into either the Subject or Name authority list before using them in a catalog record.

- Be sure to check the existing Subject list in Cuadra SKCA to ensure that an appropriate term doesn't exist before creating a new Subject.
- When creating Subject authority records, use the form of a topical subject found in Library of Congress Name or Subject Authorities (LCSH) if available. (*LCSH*) Use the most detailed authorized subject term available in LCSH. Authorized terms show a red "Authorized Heading" label in the left margin of the LCSH list (see Figure 2-3: LCSH Authorities Subject List Screen).
- If a subject term not found in LCSH, use a local controlled vocabulary term if available (for example, an authorized list of college building names). If no controlled term is available, a local term can be created.
- All subject terms should list their source (either "LCSH Authorized Subject Heading" or "Local" in the subject Scope notes field).

2.6.4 Default Names

Cuadra SKCA allows one name authority record to be set as the default for the "Current Legal Owner/Title Holder" field in catalog records. This default name should be set to "Mount Saint Mary's University (Los Angeles, Calif.)."

To create the default owner name (if a new one is needed) create one corporate name authority record. Check the box *Use as Default Owner* before saving. **Do not** check this box on any other corporate name record.

2.7 Dates

2.7.1 General Requirements

Cuadra SKCA allows entry of several dates in records. Some (like *Display Date*) can use almost any format, while others (e.g. *Numeric Date Representations*) require specific formats.

Required formats in Cuadra SKCA do not always match DACS requirements. Where possible, use DACS date requirements (*DACS 2.4*). **Numeric format dates must be entered correctly or EAD Finding Aid creation may fail.**

- To add today's date automatically, type "'/'".
- Do not add dates indicating range of materials to titles. Cuadra SKCA will automatically append the date range entered to the title when hierarchy is displayed.
- Do not use decades (1950s). Use date range 1950-1959 (*DACS 2.4.7*).
- File date ranges should not overlap! If file dates overlap within a group of files, check with the archivist to ensure original order allows rearrangement. If it does, reorganize items in files chronologically and re-label files before entry into Cuadra SKCA. Ex: NOT 1994-2006, 1992-2004. Reorder to 1992-1999, 2000-2006.

2.7.2 DACS Date Requirements

- DACS requires use of inclusive dates even if accruals are expected (*DACS 2.4.8*). It does not allow open ended date ranges (ex: 1999- or 2010-ongoing). To save excessive editing over time, use “9999” as ending date if accruals are expected. Example: “1999-9999”. When accruals end, replace “9999” with actual ending date. This also allows entry of the same date in display fields and numeric data entry fields.
- DACS requires year and month dates without a day to be shown in the format YYYY MONTH (ex: 1995 November) (*DACS 2.4.13*). However, Cuadra SKCA does not allow numeric dates to be entered in this format. Use YYYY MONTH format for Display Date, and use year only for numeric date ranges.

2.8 Locations

Locations in Cuadra SKCA are used in Catalog records to show where collection items are stored. MSMU locations in Cuadra SKCA are created by combining building, room, cabinet numbers and sections, shelves or drawers into a single string representing the unique location.

Building names do not use the official MSMU building name, but a short name, because of the character count limit in Cuadra SKCA text boxes and reports. As of this writing, only Chalon campus buildings are available as locations in Cuadra, and all rooms may not be available.

MSMU Building numbers are taken from the MSMU campus map. MSMU Room numbers are taken from MSMU building floor plans. Locations in Chalon Building B0009 Room 109A (the Archives) also indicate the area in the room (filing cabinet / drawer OR cabinet / section / shelf). Shelves are numbered from top down. See Appendix B Location Information for more information on location of cabinets in the Archives room, etc.

It should be noted that Locations do not appear on finding aids, but can only viewed by generating reports or editing records. This behavior is planned for security reasons.

MSMU locations for catalog items are stored in the Collection record only, in the *Assigned Location* field (see section 6.1.14 Adding a Collection – Location). Because only one location is allowed in a Collection record, the first drawer or shelf of collections that span drawers or shelves should be used. Location of oversized materials or any item not stored in the main location may be noted in the *Location Remarks* field of the Collection record.

2.8.1 Location Designator Formats

Location designators are built using the following hierarchy: Site/Building + Area/Room + Level 1 + other levels up to 7 (see Figure 2-4: Location Designator Hierarchy).

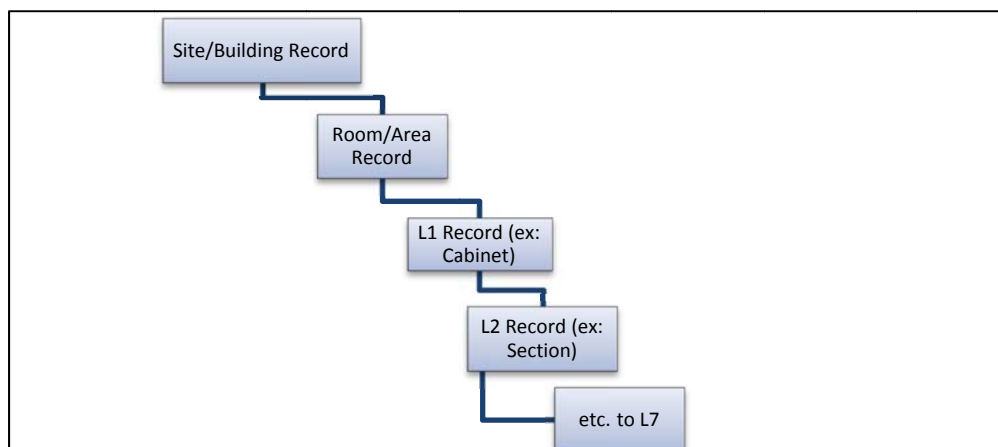
Note that numbers in all designators except Sections are left-zero filled to their maximum length. This makes all location designations a consistent length. For example, Building numbers are B + 4 numbers, left-zero filled (e.g. B0009, B0010, B0229, B1742, etc.). Rooms are 4 numbers left-zero filled, plus an optional letter (e.g. RM0007, RM0100, RM0109A, RM1026, etc.). File

Cabinets, other level 3 containers and Shelves are two letters and two numbers, left-zero filled (ex: HF01, AC04, FC33). Sections are prefix + one letter (SECA, SECC, etc.).

MSMU Location designations are in one of several formats:

- Buildings are in the format Campus-Building (ex: CHA-B0006).
- Rooms in buildings are in the format Campus-Building-Room number (ex: CHA-B0006-RM0100).
- Locations in the MSMU Archives (CHA-B0009-RM109A) are in various formats depending on the type of cabinet:
 - Filing cabinets use the format Campus-Building-Room-Filing Cabinet-Drawer (ex: CHA-B0009-RM109A-FC01-D01). Note that drawers numbered “-00” indicate the top of the filing cabinet.
 - Glass Cabinets (the wooden locking cabinets with glass door) use the format Campus-Building-Room-Glass Cabinet Section No.- Shelf No. (ex: CHA-B0009-RM109A-GC01-SECA-SH01).
 - Ranges (the metal shelves in the main Archives room) use the format Campus-Building-Room-Range Section No.-Shelf No. (ex: CHA-B0009-RM109A-RG01-SECA-SH01).
 - The Horizontal File cabinet (the flat drawer cabinet in the back of the Archives room) uses the format Campus-Building-Room-Horizontal File 01-Shelf No. (ex: CHA-B0009-RM109A-HF01-SH01).
 - The Artifacts Cabinet (the small drawer metal cabinet in the back of the Archives room) uses the format Campus-Building-Room-Artifact Cabinet 01-Section No-Shelf No. (ex: CHA-B0009-RM109A-AC01-SECA-SH01).

Figure 2-4: Location Designator Hierarchy



2.8.2 Location Types

Location Type values should only be entered in Building or Room level Location records.

Records representing cabinets, shelves, etc. within rooms will inherit the Type value from the parent record (leave the value blank when entering these records). The following Types are used for MSMU locations in Cuadra SKCA:

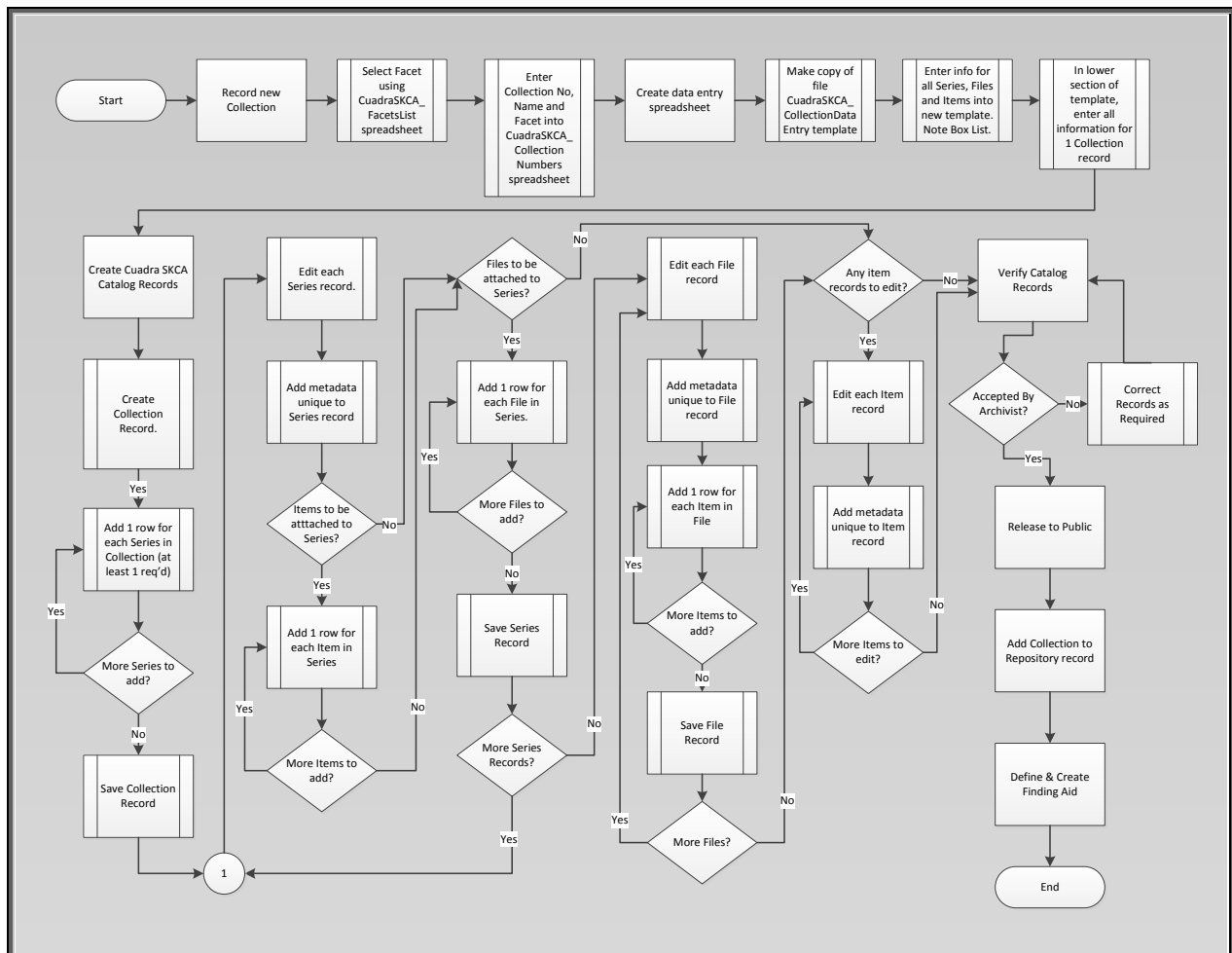
- Building – use only for Building records.
- Display – use for Room records containing displays of material archival objects, such as rooms with display tables, vestibule areas, hallways, book stacks, elevator lobbies, or conference rooms.
- Storage – use for Room records that represent storage areas, including office space used for storage.
- Workspace – use for Room records that represent offices or conference rooms without archival objects displayed in them.
- Other – use for Room records for any area not fitting one of the above categories.

3. Workflow

3.1 General Workflow for Cataloging a Collection in Cuadra SKCA

The following describes the general steps to catalog a collection in Cuadra SKCA software. Figure 3-1: General Procedure for Cataloging a Collection in Cuadra SKCA diagrams these steps as a flow chart.

Figure 3-1: General Procedure for Cataloging a Collection in Cuadra SKCA



3.2 Workflow Steps Quick List

Step 1: Assign Collection Number and Facet

- Select the correct collection facet using the CuadraSKCA_FACETS_FunctionalCodesList.xlsx spreadsheet.

- Record a new Collection number, Name and Facet in the CuadraSKCA_CollectionNumbers.xlsx spreadsheet.

Step 2: Create Data Entry Spreadsheet

- Make a copy of template file CuadraSKCA_CollectionDataEntry Template.
- Enter information for all Series, Files and Items (if needed) into the template. Note distribution of files into boxes.
- In the lower section of the template, enter all information for the Collection record. Do not change boilerplate text unless necessary.

Step 3: Create Cuadra SKCA Catalog Records

- Create 1 new Collection record and enter all the data for the Collection record from the template spreadsheet (see section 6.1 Adding A Collection Record). In the Collection record Inventory List section, enter 1 row for each Series in the collection (see section 6.2.3 Adding Series Records to a Collection). Save the record.
- Edit each Series record created in the previous step. In the *Inventory List* section for each Series record, enter 1 row for each File within that Series (see section 6.2.4 Adding File Records to Series Records). Save each Series record after editing.
- If Item level records exist, they may need to be attached to Series or File records (depending on the collection arrangement – see section 6.2 Adding Child Records). Edit the appropriate Series or File record created above. In the Inventory List section for the record being edited, enter 1 row for each Item that falls under that record. Save each Series or File records after all Items belonging to them are entered.

Step 4: Verify Catalog Records

- Edit the Collection level record for the new collection.
- Display the Finding Aid and verify all data. Make any corrections necessary.
- Display Hierarchy and verify all data. Make any corrections necessary.
- Inform the Archivist that the Collection is ready for review and approval.

Step 5: Release to Public

This step is performed for every record entered (regardless of level) ONLY after the collection is accepted by the MSMU Archivist. This step MUST be completed before attaching collections to Repository records AND before creating the EAD finding aid or the finding aid will not render correctly. See section 6.5 for instructions on releasing records to the public.

Step 6: Attach Collection to Repository Record

This step is performed only after acceptance of the collection by the MSMU archivist. Attach the collection record to Repository “MSMU-LA” (see section 6.6 for instructions).

Step 7: Define and Create EAD Finding Aid

- Define EAD Finding Aid properties (see section 6.7.1).
- Generate EAD Finding Aid (see section 6.7.2).
- Edit Collection record and display the Finding Aid. Verify that the current EAD finding aid link is present on the top right of the screen. Save a copy of the finding aid if desired.

4. Users & Security

4.1 General Security & Backup

Primary security for Cuadra SKCA is provided within the software. Three levels of access are available: Staff Access, Limited Staff access, and Public access.

4.1.1 Staff Access

Staff access allows access to all functions in Cuadra SKCA. This access is normally granted only to the MSMU Archivist, selected archives assistants and system administrators.

4.1.2 Limited Staff Access

Limited Staff access provides access to a subset of tasks, and is intended for use by student workers and/or selected volunteers. It allows adding, editing and viewing records in the Cuadra SKCA Catalog and Accessions modules, and optionally in Research Services modules. This access must be approved by the Archivist.

4.1.3 Public Access

This access level allows staff and library patrons to view, search, generate reports, and print out EAD finding aids for all collections that have been released for public access. This is the default level of access for all users not specifically approved for higher access by the Archivist.

4.1.4 Backups

Backups of Cuadra SKCA data will be performed by Cuadra Associates, Inc. on a scheduled basis. Backups of draft data entry data (Excel spreadsheet format), EAD finding aids, and current authority lists are stored in the Archives shared area on MSMU servers.

4.2 Adding Users to Cuadra SKCA

This function is not available to Limited Staff or Public Catalog session users. **Any fields not listed below should remain at default setting (do not change).** For more complete instructions, see the Cuadra User Manual Part D Management, section D-2 Create / Maintain Login User Records.

1. Navigate to *Application Management* → *Users*.
2. If a User record with the characteristics desired for the new record already exists, adding a new user can be done by copying that record. Select *Edit User Records* and search for the user record desired. Click the *Edit* button next to the record and then click *Copy* in the top menu. Change the *User Id*, *Name* fields etc. that are unique for this user, then save the record by clicking the *Done* button in the top menu.
3. If a completely new record is desired, select *Create a User Record*.
4. Enter a unique User ID in the *User ID* field. MSMU user ids use the format first initial + last name, in lower case letters (ex: jdoe).

5. Enter the user's Last Name, First Name, and Middle Initial.
6. Enter the user's initials or a short name for quick entry in the *Input Value* field (ex: "jd" for Jane Doe).
7. Select a *User Classification* value of Employee, Student or Volunteer (no other options are used by MSMU).
8. In the *Security Level / Group* field, select either *Unrestricted / Open Access* for Staff users, or *Student / Student Access* for Limited Staff access.
9. Set *Application User Type* to either *Staff/Professional* for Staff users or *Staff/Paraprofessional* for Limited Staff Access.
10. Enter a login password in the STAR Application *Login Password* field.
11. Enter a *Staff Session Welcome Name* (ex: Hello Jane Doe!). This name will show on the top right of the Cuadra SKCA screen when the user logs in.
12. Set *No. of Logins* (default is "2"). This allows the user to accidentally exit one Cuadra SKCA session while still leaving their login unlocked.
13. Set *Interface* to "StarWeb", and *Access Level* to "All".
14. Under *Management Data*, enter your user name in the *Added By* field (or enter your quick Input Value name and hit tab). Enter today's date in the *Date* field.
15. Save the record by clicking *Done* on the top menu bar.

4.3 Logging In and Out of Cuadra SKCA

Users into Cuadra SKCA by opening an authorized web browser (currently Firefox or Chrome) and navigating to the Cuadra SKCA link (<https://MSMU.cuadra.com/star/skca-login.html>).

Three versions of Cuadra are accessible to archives staff users: the Customer Version, the Cuadra Version, and the Public Catalog. While both versions are hosted on Cuadra servers, the Cuadra Version is a test version only. While staff users can use the Cuadra Version to test record entry, they should be aware that MSMU collection records, name authority and other default data is not present in that version. The Public Catalog version provides a view of what a public user would see when opening Cuadra SKCA, allowing staff to test the public user experience.

Users encountering any login errors should contact the MSMU Archivist (not the **MSMU Helpdesk!**).

4.3.1 Logging Into the Customer Version or Test Version

1. To log in to Cuadra Customer Version, select the *Customer Version* tab on the Login Screen (see Figure 4.1). Enter your user id and password in the appropriate entry box: *Staff Session* or *Limited Staff Session*. Then click the *Login* button.

- To log in to the Cuadra (test) Version, select the *Cuadra Version* tab on the Login Screen (see Figure 4.1) and click “*Automatic Login*” under *Staff Session*.

Figure 4-1: Cuadra SKCA Login Screen

4.3.2 Logging Into the Public Catalog

There are two ways to enter the Public Catalog: via the Login screen or via the Home screen.

- To log in to the Public Catalog via the Login Screen, simply click on the “*anonymous-user login*” link in the *Public Catalog Session* section of the screen (see Figure 4.1).
- To log in to the Public Catalog via the Home Screen, log into the Cuadra SKCA Customer Session. Then click on the “*Public Catalog*” link in the top right corner of the Home Screen (next to the *Exit* and *Help* links). This will open the Public Catalog screens in a separate browser tab that can be closed without logging out of the Cuadra SKCA main screen.

4.3.3 Logging Out of Cuadra SKCA

Users are assigned one or more possible simultaneous logins to Cuadra SKCA (usually two). The number of logins is set separately for each user under *Management* → *Application Management* → *Edit Users*.

Exiting from Cuadra SKCA by simply closing the browser does not log the user out of Cuadra SKCA! Users must log out of Cuadra by using the “Exit” link on the top of the main Cuadra SKCA screen. **This includes the Public Catalog screens.**

If a user exits Cuadra SKCA without logging off and leaves their allotted number of logins unclosed, they will be locked out of the system for time selected before open logins elapse. The amount of time that can elapse before an open login closes is set in the *Idle Timeout* and *Kill Timeout* fields for the user record. The only other way to close open connections is by contacting Cuadra Support staff.

5. Accessions

This module is currently unused by MSMU.

6. Cataloging A Collection

6.1 Adding a Collection Record

This function is not available to Public Catalog Session users. **Any fields not listed below should remain at default setting (do not change).** Note that at any time the user can skip to a section of the record by clicking on the *Field List* outline in the left margin of the *Collection Add* screen (see Figure 6.1).

When filling out fields for this section, users should remember that they are describing the **entire** collection, not any single item in it. Information specific to items or parts of a collection should be entered in a lower level type record (series, file, or item).


6.1.1 Creating and Saving a Collection Record

Select *Catalog* → *Create Records* (or *Add New Records*) → *Collection*. A new collection record data entry window will appear.

To save the record at any time, click the *Done* button on the top of the Cuadra SKCA data entry screen. To discard the record, click *Cancel*. Clicking the *New* button and selecting any option will also save the record.

6.1.2 Basic Elements

This section contains basic information about the collection (see Figure 6-1: Collection Add Screen - Basic Elements).

- **Record Level Name:** Click the dropdown arrow  next to the *Record Level Name* box. Select “collection” and click *Paste*. (Or, for a shortcut, you can type “coll” in the box and press the *Tab* key.)
- **Assigned Code Name for Hierarchy:** Enter an abbreviation for this collection name that will be easy to remember. Ex: for MSMU Collection of Doheny History = “DohenyHist”.
- **Item-Level Collection:** Leave unchecked unless the collection will contain only a Collection record and Item records (very rare).
- **Repository Catalog Number:** Enter the MSMU Collection Number. (ex: CLMSM-US-029). This number must be unique and should be assigned during collection description from MSMU’s master list of collection numbers. If you do not use a unique number, you will not be able to save the Collection record.
- **Title:** Enter the full collection title. Examples:
 - Records of the Department of Art
 - Don & Mary Cataran Sloper ‘62 Collection of Doheny History
 - Frank Hamilton Spearman Papers

- Display Dates:** Enter the date range of **all** materials in the collection (NOT a lifespan of an individual, etc.) in the format YYYY-YYYY (ex: 1929-1962). See section 2.7 on Date Requirements for date format rules. This field is for display only, and will not be tested for date field data type compliance (i.e., it can contain information such as “circa”, “1960s”, etc.) Note that date ranges for portions of the collection (series, files, items) may not have the same date range and separate dates for those portions will be entered at a lower record level.

Figure 6-1: Collection Add Screen - Basic Elements

- Title for Sorting in Collection Lists:** Enter a sortable title if one different from the full title is required. This title will be used for the alphabetic letter search on the Public screen. Examples:
 - For collection title “Records of the Department of Sociology”, enter “Department of Sociology” to sort all departments alphabetically under letter “D”.
 - For collection title “Don and Mary Cataran Sloper Collection of Doheny History”, enter “Sloper, Don and Mary” to sort collection under letter “S”.

6.1.3 Creators

This section contains information about the collection’s creators (see Figure 6-2: Collection Add Screen – Creators). Creators refer to the people who author, assemble, accumulate or maintain and use collection materials. Creators can be individuals (authors, artists, photographers,

scrapbook creators, etc.) or groups (such as families, fraternities or departments). At least one Creator is required for each collection (*DACS 2.6*). Do not enter MSMU Archives as the creator unless the collection is named as being an MSMU collection.

Remember that this field helps public users find materials. If possible, list individual creators for books, manuscripts, correspondence, or any item likely to be searched by the creator's name. If creators are not listed in this section, they should at least be listed in the *Scope & Contents* field for the entire collection. If the bulk of a collection comes from a single creator, and only a few individual items from other creators, enter creator information at the Item level or in *Scope & Contents* notes rather than in the Collection level record.

Figure 6-2: Collection Add Screen – Creators

- **Creator:** Enter one or more Creators for the collection. At least one Creator should be selected unless the creator is totally unknown, in which case leave this field blank (*DACS 3.1*). Select drop list next to Creator box by clicking on down arrow ▾.
 - If the Creator's Name already exists as a Name authority record in Cuadra, enter a text string to search for Creator's Name record. Wildcards can be used (ex: Slop*) or a single asterisk (*) to return all names. Then check the box next to the name desired. Click the *Paste* button.

- If the Creator's Name does NOT already exist as a Name authority in Cuadra, it can be added by clicking on *Create a New Name Record: Group or Individual*. (See section 7.3 on creating Name Authority records and 2.6 Name Authority Requirements for more information)
- **Role:** Select one role using the drop list. If there is more than one role for this creator, choose "Collector".
- **Administrative / Biographical History (DACS 2.7):** This field should contain relevant information about corporate bodies, persons or families who are identified using the *Creators* field. It also describes the relationship of creators to archival materials by providing context in which those materials were created. If the Creator's Name record in Cuadra already contains biographical notes, clicking the down arrow ▼ next to this field and searching on the Creator name will copy those biographical notes in this field. However, full biographical notes should be written in narrative form (not just as notes!) as part of the collection description process. See individual biography example files for more information. Examples:
 - "The Records of the Ballet Folklórico Club collection, CLMSM-US-067, documents the activities of this student cultural group at Mount Saint Mary's University (Los Angeles, Calif.). The collection includes announcements, flyers and other general records."
 - "José Drudis-Biada was born on December 19, 1890 in Avinyo, Spain (near Barcelona). He was the son of The José Drudis-Biada Gallery was built on the Chalon campus of MSMU in 1974." etc.

6.1.4 More Dates

This section contains date information (see Figure 6-3: Collection Add Screen - More Dates). Unlike the *Display Date* field in the *Basic Information* section, these fields contain numeric date representations that must be in a specific date format.

- **Full Date (or Range):** Only use this field if the date range for the collection contains full dates (i.e. MM/DD/YYYY). If year only will be used, use the *Year* field instead. Only numeric characters can be entered in these fields. If the date is for BC (Before Christ) instead of AD (Anno Domini), check the *BC* box in front of the date(s).
- **Year:** Enter date range for the collection in the format YYYY. If only one year, enter only into first field. If range, enter starting year in first field, ending year in second field. Only numeric characters can be entered in these fields. If the date is for BC (Before Christ) instead of AD (Anno Domini), check the *BC* box in front of the date(s).

Figure 6-3: Collection Add Screen - More Dates

The screenshot shows a software interface for adding a collection record. The top bar includes buttons for 'New', 'Done', 'Cancel', 'Close', 'Paste Multiple', 'Undo', and 'Redo', along with a 'Help' icon. The 'Field List' on the left is expanded to show 'More Dates'. The main content area is titled 'New Record Number: 898' and contains three sections:

- More Dates:** Contains 'Numeric Date representations' with two rows of input fields. The first row is for 'Full Date (or Range: Not Before / Not After)' and the second is for 'Year (or Range: Not Before / Not After)'. Each row has a checkbox for 'BC' and an input field.
- Date Remarks:** A rich text editor with a toolbar containing bold (B), italic (I), underline (U), bulleted list (2), numbered list (2), and link (é) icons.
- Physical Description:** Contains 'Archival Quantity' with a 'Quantity' input field and a 'Unit' dropdown menu. Below it is 'Extent (quantity/size...) Statement' with another rich text editor and toolbar.

6.1.5 Physical Description

This section describes the physical size and contents of the collection (see Figure 6-4: Collection Add Screen - Physical Description).

- Archival Quantity: Enter a number. Units should be Linear Feet (for file cabinet collections) or Cubic Feet (for boxed collections). Quantity is number of linear or cubic feet. For individual files, count 1 file folder as .1 linear feet. Count 2.5 linear feet for each full file cabinet drawer.
- For help in calculating linear feet, see the following resources:
 - Yale University Linear Footage Calculator (*YALE*).
 - Tennessee State Library and Archives Archival containers (*TENN*). Tables of cubic-foot equivalents for containers, shelving and cabinetry commonly found in archives
 - Archival analog and digital measurement equivalents (*AB*).

Figure 6-4: Collection Add Screen - Physical Description

- **Extent:** Enter a statement describing the quantity and size of the collection, including all collection elements such as oversized materials or books that don't reside in the same location with the main collection. Include linear feet, number of items, number of containers, or in terms of material types. If collection will remain in filing cabinets, simply list linear feet and number of folders (see *DACS 2.5* for more examples).
Examples:
 - 2 linear feet (11 folders)
 - 3 linear feet of files plus 4 oversized boxes, 37 books, 14 bound catalogs, 16.8 GB of electronic files

- 1.5 linear feet (1 box containing 1 folder plus 1 boxed thesis)
- 45 linear feet including 200 photographs and 16 maps
- **Archival Arrangement Description** (*DACS 3.2.4*): Describe the order of materials. Examples:
 - By subject within series, then chronological within folder.
 - Alphabetical by name then chronological within file.
- **Media Type**: Select drop list next to Media box by clicking on down arrow▾. Check the boxes next to one or more types of media. Select the most detailed category: i.e., select “Correspondence” rather than “Loose Paper”. Click the *Paste* button to move your checked choices into *Media Type* list. If you need to enter more Media Types, add a new row by clicking the green plus button (+) on the row above the one you want to add and selecting the drop arrow again to add one or more choices. To remove a row, click the red minus (-) button next to the row.
- **Required Technology** (*DACS 4.3*): Normal paper records do not require entry in this field. If the collection contains digital elements, electronic media, or other record formats requiring instructions on use, enter instructions in this field. Include computer operating system and version, software names, vendors and versions, hardware vendors and model numbers, audio or video codex information, and any other special instructions.
- **Condition Rating**: Select general condition of the collection materials from the drop list. Default is “Good”.
- **General Condition Description**: If any special condition exists that would affect user access of the materials, enter that information. If note should appear in the public finding aid, check the *Public Data* box.

6.1.6 Summaries & Subjects

This section describes the subjects covered by the collection, as well as the amount and types of materials in the collection (see Figure 6-5: Collection Add Screen - Summaries & Subjects).

- **Scope and Content** (*DACS 3.1*): This field should contain information about the nature of the materials in the collection, including the amount and type of materials. It should give a general summary of each series in the collection, as well as listing any individual or group names or geographical areas or places pertinent as access points to the collection. It should also contain notes concerning related materials and their location, and a Box List showing the distribution of series/files/items in each box in the collection (see Figure 6-6: Example MSMU Box List):

Figure 6-5: Collection Add Screen - Summaries & Subjects

- “The Sr. Magdalen Coughlin CSJ collection consists of 3 linear feet (45 folders) of materials, including correspondence, notes, reports, clippings...Series 1 Inauguration 1976 includes 1 box containing 7 folders of correspondence, flyers, pamphlets...Series 2 Administration (1976-1989) includes 2 boxes (11 folders) containing clippings, notes, pamphlets...”
- “The MSMU Collection of Doheny History provides data about Chester Place and its vicinity, and the inhabitants of the 14 homes that lined the street, including the families of....The collection also contains tour notes and information about the Doheny Docents group, various photographs and postcards showing the property and campus. The collection is divided into 8 series. Series 1: Chester Place History contains materials relating to the Chester Place property as a whole, including clippings, correspondence, flyers....List of Subjects and Names

associated with the Teapot Dome Hearings: Ballard, H. W. California oil man testified at Teapot Dome hearings; British-American petroleum Company Ltd: Formed in 1919...Related materials: Oversized materials including Teapot Dome Transcripts are located in oversized filing cabinet F32-D1.”

Figure 6-6: Example MSMU Box List



- **Subject:** Contains one or more terms describing the topics, individuals or groups that are the subject of items in the collection. Currently, this field is only being completed at the collection level, unless individual items have special subject terms not related to the entire collection. (An example of subject terms needed at item level might be a thesis on a certain subject contained in a folder about an individual that is itself contained in a collection of writings by many people; OR a special collections book on a specific subject in a collection from a donor.) See section 2.6 Name Authorities and Subject Terms for rules governing subject entry. Per accepted archival standards, do not use the author’s name as a subject field.
 - Select one or more subjects describing the collection from drop lists available at the right side of the Subject box.
 - Each new subject term should be added on its own line by clicking the green plus (+) sign next to a row to add a new row.
 - Enter Topical terms by using the Subject drop down arrow (▼), which lists terms in the Subject authorities list in Cuadra SKCA.
 - Individual and corporate Names that are subject terms should be taken from the Cuadra Name authorities list using the *Name* drop list (▼ Name). New topical subject terms and individual or group name authorities can be added when accessing the drop list by clicking the link under the drop list window name (i.e. “Create a New Subject” or “Create a new Name record: Group (or) Individual”). See section 2.6 on Adding Authority records for more information on adding subjects.
- **Cross Collection Category:** This field should contain a four-letter facet code selected from the master facet list found in the archives share drive (see section 1.2 References for list location). Each facet represents a broad category of collections, i.e. DEPT for

department collections, CHES for collections representing Chester Place History, etc. Select ONLY 1 category for this collection. See section 7.7.2 Cross Collection Subjects for information on adding a new category.

6.1.7 *Bibliographic & Availability Data*

This section describes the suggested wording for users citing the collection, any languages it is written in, and special identifiers (see Figure 6-7: Collection Add Screen - Bibliographic & Availability Data).

- **Preferred Bibliographic Citation for Finding Aid:** This field contains the citation that should be used by anyone citing the collection in scholarly sources.
 - For Record Groups, use the pattern “Records of the Department of xxx, CLMSM-US-zzz, University Archives, The Charles Willard Coe Memorial Library (Chalon Campus), Mount Saint Mary’s University (Los Angeles, Calif.)”, replacing “xxx” with the name of the department or group, and “zzz” with the collection number.
 - For collections, use the pattern “XXX Collection, CLMSM-US-zzz, University Archives, The Charles Willard Coe Memorial Library (Chalon Campus), Mount Saint Mary’s University (Los Angeles, Calif.)”, replacing “xxx Collection” with the collection name, and “zzz” with the collection number.
- **Originals Statement:** Check *Not Specified* unless collection specifically only contains originals or copies of another collection.
- **Location & Availability of Originals:** If originals are specifically stored in a different location from copies, enter the location of originals. Otherwise leave blank.
- **Location & Availability of Copies:** If copies are specifically stored in a different location from originals, enter the location of copies. Otherwise leave blank.
- **Language:** This field should contain one or more rows naming the language used in collection materials. Select a language from the drop list. If the language desired does not exist, a new language can be entered via the *Edit Language Records* link under the window title. (See section 7.1 Authority Lists and Drop List Values – Languages for more information.) Note: to enter “English”, type “eng” and press the tab key.
- **Languages/Scripts of Materials Statement:** This field may contain any notes to the user about languages used for materials, scripts used for electronic files, etc. If no notes, leave field empty.
- **DC Resource Identifier and Qualifier (DCMI):** Use this field only if cataloging a book or other item that for which you wish to have this specific Dublin Core Metadata Initiative (DCMI) data field filled. Normally this field will only be filled for Item (level 4) records. For more information about DCMI field, see the link to the DCMI resource in References (section 1.2). This field can contain an ISBN number, an OCLC number, a bibliographic citation, an accession number, a URL, URI or DOI number, etc. Select the

Qualifier for the *Resource Identifier* from the (qualifier) drop list that best reflects the type of identifier. If the standard qualifier needed is not in the drop list, the list can be edited by clicking on the pencil icon (✎) next to the *Qualifier* drop list. (See section 7 for information on editing drop lists.)

Figure 6-7: Collection Add Screen - Bibliographic & Availability Data

The screenshot shows the 'Collection Add Screen - Bibliographic & Availability Data' interface. At the top, there are buttons for 'New', 'Done', 'Cancel', 'Close', 'Paste Multiple', 'Undo', and 'Redo'. The main window title is 'New Record Number: 898'. On the left is a 'Field List' with the following categories and sub-items:

- Basic Elements
 - Record Level
 - Repository Number
 - Title
 - Display Dates
 - Title for sorting
 - Other/variant Titles
- Creators
 - Creators
 - Biography
- More Dates
 - Dates
 - Date Remarks
- Physical Description
 - Archival Quantity
 - Extent
 - Archival Arrangement
 - Media Types
 - Required Technology
 - Condition
- Summaries & Subjects
 - Abstract
 - Scope & Content
 - Subjects
 - Cross-collection Categories
- Bibliographic & Availability Data
 - Preferred Citation
 - Originals Statement
 - Location of Originals
 - Location of Copies
 - Languages
 - Languages Statement
 - DC Resource Identifier
 - MARC Export Codes
- Electronic Resources
 - URLs
 - Constructed URLs
 - SFS Files
 - High-resolution Files
- Chain of Custody
 - Credit Line
 - Acquisition Method
 - Acquisition Notes
 - Donors/Sources
 - Current Owners
 - Original Owners

The main data entry area is titled 'Bibliographic and Availability Data' and contains the following sections:

- Preferred Bibliographic Citation for Finding Aid:** A rich text editor with a toolbar containing 'B', 'I', 'U', '2', '2', and 'é'.
- Originals Statement:** Radio buttons for 'All originals', 'All copies', 'Mtx of some originals and some copies', 'Both originals and duplicative copies', and 'Not specified' (selected).
- Location & Availability of Originals:** A rich text editor with a toolbar containing 'B', 'I', 'U', '2', '2', and 'é'.
- Location & Availability of Copies:** A rich text editor with a toolbar containing 'B', 'I', 'U', '2', '2', and 'é'.
- Language:** A dropdown menu with a plus sign, minus sign, and 'English' selected.
- Languages/Scripts of Materials Statement:** A rich text editor with a toolbar containing 'B', 'I', 'U', '2', '2', and 'é'.
- DC Resource Identifier:** A 'Resource Identifier' field with a plus sign, minus sign, and a '(qualifier)' dropdown menu with a pencil icon.
- MARC Export Codes:** A section at the bottom of the main area.

Figure 6-8: Collection Add Screen - Electronic Resources

The screenshot displays the 'Collection Add Screen - Electronic Resources' interface. At the top, there is a search bar and navigation buttons: 'Done', 'Cancel', 'Close', 'Paste Multiple', 'Undo', and 'Redo'. The main header indicates 'Editing Record Number: 483 [View in Hierarchical Context]'. On the left, a 'Field List' is visible, with 'Electronic Resources' selected. The main editing area is divided into several sections:

- Electronic Resources:** Includes a 'Complete URL' field (e.g., http://www.cuadra.com), a 'Link Text' field, and radio buttons for 'Resource', 'Related resource', 'No information provided', and 'Primary'. There are also checkboxes for 'OK for public, and generate' and 'link for all users'.
- Constructed URL:** Includes fields for 'Access Method', 'Hostname/Domainname', 'Port Number', 'Path (e.g., documents/pdfs/)', 'File Name', 'Descriptive Note (e.g., Link text, caption)', 'File (MIME) Type', and 'File Size'. It also has radio buttons for 'Resource', 'Related resource', 'No information provided', and 'Primary', and checkboxes for 'OK for public, and generate' and 'link for all users'.
- STAR Filing System (SFS) File:** Includes fields for 'Original File Name', 'Original Thumbnail File Name', 'Descriptive Note', 'Technical Note', 'Folder', and 'Date Added'. It has radio buttons for 'Resource', 'Related resource', 'No information', and 'Primary', and checkboxes for 'OK for public, and generate' and 'link for all users'. Below are tables for 'Identifier', 'Repository', 'File (MIME) Type', and 'File Size' for both the main file and a thumbnail.
- High-resolution File:** Includes fields for 'Online File Address (URL)', 'Location of Offline Media', 'File Size', 'Technical notes', and 'Locator Number'.

6.1.8 Electronic Resources

This section may be filled in if electronic resources related to the collection exist (see Figure 6-8: Collection Add Screen - Electronic Resources). **Do not use any field in this section without approval of the MSMU Archivist.** At the time of this writing this section is unused. More extensive descriptions of the fields in this section can be found in the Cuadra SKCA Part C (Catalog) manual, section C-1.9.

If electronic resources are held in external hard drives or on disks, simply note them under “Related Materials” in the *Citations & Related Materials* section (see section 6.1.12). Do not use this section to provide links to EAD Finding Aids (they are defined using the Management functions of Cuadra SKCA rather than in Collection records).

The sections generally describe four types of electronic resources:

- The *URL* section refers to resources on web sites or web pages. This section has not been tested at the time of this writing.
- The *Constructed URL* section describes files stored locally in a directory on an MSMU web server. This section should not be used until access policies are established with advice from the MSMU Office of Information of Technology, as they may involve public users accessing MSMU servers.
- The *STAR Filing System (SFS)* section relates to materials hosted on the Cuadra servers. Using this section will upload electronic copies of MSMU resources to a Cuadra server.
- The *High-Resolution File* section is used to locate the high-resolution version of another electronic file. High resolution files are intended for internal use only and are not shown in the Public Catalog.

6.1.9 Chain of Custody

This section documents donor, ownership and provenance information for collections (see Figure 6-9: Collection Add Screen - Chain of Custody).

- **Acquisition Notes:** Enter any general notes desired related to the acquisition of the collection materials. If no special notes exist, leave this field blank (default).
- **Donor/Source:** If the entire collection or significant parts of the collection came from one or more individual or group donors, select the name of the individual or group from the drop list. Otherwise, leave this field blank.
- **Current Legal Owner/Title Holder:** This field is filled in by default with the value “Mount Saint Mary’s University (Los Angeles, Calif.)”. This value is set by marking this particular name authority as the “Default Owner” (see section 7.3.2 Corporate Names – Use as Default Owner for more information). Unless otherwise advised by the MSMU Archivist, do not change the default value in this field.

- **% Owned:** If the collection is wholly owned by MSMU, do not change the default value of “100”. If legal ownership of the collection is split between more than one owner, change this value to reflect the correct percentage of ownership for this owner.
- **Provenance:** Unless otherwise instructed by the MSMU Archivist, enter the default value “Material collected by university archives”.

6.1.10 Accrual and Retention Data

This section indicates whether more materials are expected to be added to this collection, and if there is a specific retention policy for the items (see Figure 6-10: Collection Add Screen - Accrual & Retention Data). Unless instructed by the MSMU Archivist, only *Accruals Expected* and *Retention Type* should be filled in this section.

- **Accruals Expected** (checkbox): If more materials are expected to be added to this collection on an ongoing basis, check this box.
- **Retention Type:** Select a value from the drop list. Use the default value “Archivist’s Discretion” unless otherwise instructed by the MSMU Archivist.

Figure 6-9: Collection Add Screen - Chain of Custody

New Record Number: 898

Chain of Custody Help

Owner/Source Credit Line for Finding Aid

Accession Number Acquisition Method Date Received

Acquisition Notes

DonorSource

Notes

Current Legal Owner/Title Holder
Mount St. Mary's College (Los Angeles, Calif.)

% Owred Notes
100

Original Owner

% Owred Owned from to Notes

Subsequent/Interim Owner

% Owred Owned from to Notes

Custodial History

Proverance

Accrual and Retention Data Help

Field List

- Basic Elements
 - Record Level
 - Repository Number
 - Title
 - Display Dates
 - Title for sorting
 - Other/Variant Titles
- Creators
 - Creators
 - Biography
- More Dates
 - Dates
 - Date Remarks
- Physical Description
 - Archival Quantity
 - Extent
 - Archival Arrangement
 - Media Types
 - Required Technology
 - Condition
- Summaries & Subjects
 - Abstract
 - Scope & Content
 - Subjects
 - Cross-collection Categories
- Bibliographic & Availability Data
 - Preferred Citation
 - Originals Statement
 - Location of Originals
 - Location of Copies
 - Languages
 - Languages Statement
 - DC Resource Identifier
 - MARC Export Codes
- Electronic Resources
 - URLs
 - Constructed URLs
 - SFS Files
 - High-resolution Files
- Chain of Custody
 - Credit Line

Figure 6-10: Collection Add Screen - Accrual & Retention Data

6.1.11 Restrictions & Permissions

This section describes rules governing public access to the collection (*DACS 4.1*) (see Figure 6-11: Collection Add Screen - Restrictions & Permissions). Remember that some personal data and student school and grade information may be protected by law from release to the public. Some collection contents may be restricted due to donor request or other reasons.

- **Access Restrictions (public statement):** Select a value from the drop list (do not leave this field blank). See Appendix A-Boilerplate Text for possible values for this field.
- **Use Reproduction Restrictions (public statement):** This field should always be filled. See Appendix A-Boilerplate Text for possible values for this field.
- **Reproduction Rights Owner:** Select the value “Mount Saint Mary’s University (Los Angeles, Calif.). Archives” from the drop list. Note: for quick entry, type “arch*” in the textbox, and then open the drop list. Check box next to the MSMU Archives value and click the *Paste* button.
- **Main Contact:** Enter “Archivist”.
- **Address:** Enter the current MSMU Archives street address.
- **Phone:** Enter the current MSMU Archives telephone number, including area code, in the format 999-999-9999.

Figure 6-11: Collection Add Screen - Restrictions & Permissions

The screenshot displays a software interface for adding a new record, specifically focusing on the 'Restrictions and Permissions' section. At the top, a blue header bar contains navigation buttons: 'New', 'Done', 'Cancel', 'Close', 'Paste Multiple', 'Undo', 'Redo', and 'Help'. Below the header, the 'New Record Number' is displayed as 898.

The main interface is divided into two primary areas:

- Field List (Left Panel):** A vertical list of categories and sub-fields, including:
 - Basic Elements (Record Level, Repository Number, Title, Display Dates, Title for sorting, Other/Variant Titles)
 - Creators (Creators, Biography)
 - More Dates (Dates, Date Remarks)
 - Physical Description (Archival Quantity, Extent, Archival Arrangement, Media Types, Required Technology, Condition)
 - Summaries & Subjects (Abstract, Scope & Content, Subjects, Cross-collection Categories)
 - Bibliographic & Availability Data (Preferred Citation, Originals Statement, Location of Originals, Location of Copies, Languages, Languages Statement, DC Resource Identifier, MARC Export Codes)
 - Electronic Resources (URLs, Constructed URLs, SFS Files, High-resolution Files)
 - Chain of Custody (Credit Line, Acquisition Method, Acquisition Notes, Donors/Sources, Current Owners, Original Owners, Interim Owners)
- Main Form Area (Right Panel):** Contains the 'Restrictions and Permissions' section with the following sub-sections:
 - Access Restrictions (public statement):** A text input field.
 - Access Restriction Details (internal data):** A rich text editor with bold, italic, underline, and link buttons.
 - Restricted until (date):** A date input field with a 'Restrictions Vary' checkbox.
 - Use/Reproduction Restrictions (public statement):** A text input field.
 - Use/Reproduction Restriction Details (internal data):** A rich text editor with bold, italic, underline, and link buttons.
 - Reproduction Rights Owner:** A section with a '+' icon, containing a dropdown menu for 'Main Contact', an 'Address' field, 'Phone' and 'e-mail' fields, and a 'Note' field.
 - Rights Granted Log:** A section with a '+' icon, containing a dropdown menu for 'Rights granted to:', a 'Main Contact' dropdown, an 'Address' field, 'Phone' and 'e-mail' fields, and 'Date' and 'Use/Notes' fields.

Figure 6-12: Collection Add Screen - Citations & Related Material

6.1.12 Citations & Related Material

This section allows entry of additional information about published items in the collection, related electronic or legacy (paper) finding aids for the collection, or related archival items (see Figure 6-12: Collection Add Screen - Citations & Related Material).

At the time of this writing, MSMU Archives practice is to include citations in the *Scope & Content Notes* (under notable items) or in Item level records rather than using the Citations field.

- Related Item (in Archive Catalog) / Title:** If another collection contains materials that would help a user to understand the current collection, select the collection using the drop list. The system will fill in the Cuadra SKCA record number for the item, and automatically fill the collection name in the Title field. Ex: The MSMU Doheny History Collection might reference the Don and Mary Cataran Sloper '62 Collection of Doheny History.

- **Related Materials (Description):** Add notes concerning other collections, archived items or special collections items that might aid the user to understand this collection, or that are not in the same location as the bulk of the collection materials. Such items may be stored apart from the collection because they are in another collection, are duplicates, are material objects, are oversized, are special formats, are electronic files, are large collections of photographs or in scrapbooks, are on display, are in special collections, are in the main library stacks, require special storage conditions, etc. Examples:
 - “Sr. Mary Irene Flanagan Thesis is available in digital form, with all digital images available individually. Oversized materials including Estelle Doheny Land Grants and Teapot Dome Hearing transcripts in oversized filing cabinet F32-D1. See library catalog for books concerning the Doheny family, Chester Place, The Estelle Doheny Collection, and the Teapot Dome Scandal. Two archival copies of Mexican Petroleum by E. L. Doheny can be found in Special Collections.”
 - “Physical items related to this collection can be found on display in the locked glass cabinets in the Archives room GC01-SECB-SH02.”

6.1.13 Finding Aids

This section is not currently used by MSMU.

6.1.14 Location

This section records the location of collection materials (see Figure 6-13: Collection Add Screen - Location). Location values should be entered only in Collection level records, not in lower level records. Enter the location containing the bulk of the collection materials. Any other locations such as those for oversized materials, etc. should be entered in the *Location Remarks* field.

- **Location Now:** Select *Assigned Location* from the drop list, unless the entire collection has been moved from its assigned location. If individual items in the collection have been moved out of the assigned location for the collection, set the *Location Now* value in the individual item records.
- **Assigned Location ID:** Click the down arrow button next to this field to search for a location in the archives (file cabinet / drawer or range / section / shelf, etc.) where the bulk of the collection resides. A new window will open allowing you to search for a location.
 - If you know the filing cabinet or range, you can enter it into the search list preceded by an asterisk to quickly pull up that location in the Archives. (The Archives is currently the only room to have file cabinets etc. in Cuadra SKCA.) Ex: for Range 6, enter “*RG06*” then the *Search* button.
 - Open the location tree by clicking on the plus button (+) next to the branch of the location hierarchy. Keep opening branches until you find the last part of the location, then click the radio button next to the location. Then press the *Paste*

button. The entire location value will be pasted into the *Assigned Location* field. For example, clicking on D01 under RM109A FC19 will enter the location CHA-B0007-RM0109A-FC19-D01.

Figure 6-13: Collection Add Screen - Location

The screenshot shows a software interface for adding a collection record. At the top, there are buttons for 'New', 'Done', 'Cancel', and 'Close'. Below these are 'Paste Multiple', 'Undo', and 'Redo' buttons. The main window title is 'New Record Number: 898'. On the left is a 'Field List' with categories like 'Finding Aids', 'Location', 'Management & Status Data', 'Internal System ID', and 'Inventory List'. The 'Location' section is active, showing a 'Public Location/Accessibility Information' text area with a rich text editor toolbar. Below that is a 'Location Now' dropdown menu. The 'Assigned Location ID' field is highlighted, and it is linked to 'Site/Building' and 'Area/Room' fields. There is also a 'Location Remarks' text area with a rich text editor toolbar. At the bottom, there is a 'Management and Status Data' section.

6.1.15 Management & Status Data

This section contains administrative metadata about the status of the record, who entered the data, etc. (see Figure 6-14: Collection Add Screen - Management & Status Data).

- **OK to Release For Public Catalog/Finding Aid? / As-of Date:** On initial data entry of the collection, select the “No” radio button. Enter today’s date in the *As-of Date* field. Collection records will be released after approval using a Cuadra SKCA Management function (see section 6.5 Releasing Records to the Public).
- **Record Status / As-of Date:** Select *To Be Reviewed* from the drop list. Enter today’s date in the *As-of Date* field.
- **Description Prepared By / Date:** Select the name(s) of the MSMU Archives personnel who were responsible for creating the collection description information from the drop list next to the *Staff* field. If known, you can enter the shortcut code for each personnel into the *Staff* field and pressing *Tab*. Enter today’s date in the *Date* field. Leave the *Public Data* field unchecked.

Figure 6-14: Collection Add Screen - Management & Status Data

6.1.16 Record History

This section is filled automatically by the system (see Figure 6-15: Collection Add Screen - Record History). It contains administrative metadata such as the record ID for this record and the dates the record was created and last updated.

Figure 6-15: Collection Add Screen - Record History

Record 1 of 1

Search Done Cancel Close Help

Paste Multiple Undo Redo

Editing Record Number: 483 [View in Hierarchical Context]

Record History Help

Record ID: 000000896

Record Created		
Date	Time	User
2014 06 11	17:35:51	nsteinmann

Record Updated		
Date	Time	User
2014 09 04	12:27:36	nsteinmann

Field List

- Access Restrictions
 - Restriction Details
 - Restricted until
 - Use Restrictions
 - Use Restriction Details
 - Reproduction Rights Owners
 - Rights Granted Log
- Removals & Transfers
 - Permanent Action Dates
 - Removal/Transfer Notes
 - Removal/Transfer Log
- Citations & Related Material
 - Citations
 - Related Finding Aids

6.1.17 Inventory List

The *Inventory List* is used when adding records lower in the hierarchy that should be linked to the current record (see Figure 6-16: Collection Add Screen - Inventory List). Note that there are three areas to enter data in this section: one for Subgroups or Series (level 2), one for Containers (level 3) and one for Files, Items and Parts (level 4). You must enter the data into the correct section for the type of child record you are creating. See section 6.2 General Notes on Adding Child Records for more information.

After you enter any child records for the Collection record, click *Done* to save the Collection record.

6.2 Adding Child Records (Series / Files / Items)

6.2.1 General Notes on Adding Child Records

Section 2.2.1 MSMU General Strategy for Cataloging Collections explains the hierarchical structure of records in a collection. Series, File and Item records are “child” records underneath the Collection “parent” record. Child records can be created individually and manually linked to the “parent” record. However, it is easier to create the basic information for these records right in the parent record, then “explode” them into separate records, by using the *Inventory List* section (see Figure 6-16: Collection Add Screen - Inventory List). Be sure to click the *Done* button after entering items in the *Inventory List* section of a parent record to save and explode the child records.

Child records are added to the record above them in the hierarchy, i.e., to add Series records edit the Collection record, to add File records edit a Series record, and add Item records edit a Series or File record. Make sure you are editing the correct record before you add child records!

Figure 6-16: Collection Add Screen - Inventory List

Each collection should have at least one Collection, one Series and one File or Item record. However, you can save the parent record and edit the record to enter and/or explode child records at a later time if desired. It is also possible to enter child records, explode them, and then enter more child records at another time. Once exploded, the child record information no longer appears in the Inventory List section.

In Cuadra SKCA child records entered into a parent record in the *Inventory List* section do not need to be exploded at all. If not exploded, the information about them that you enter will remain in the list inside the parent record, and no separate child records will be created. However, the

current MSMU procedure is to explode child records. See the Cuadra SKCA Manual Part C section 1 for more information on exploding, attaching and unattaching parent and child records.

Be sure to enter child records in the order you want them to appear in the hierarchy.

Cuadra SKCA creates the hierarchy in the order you enter the records, **not** in the order they are manually numbered.

Information on using the *Inventory List* to create various record levels is in the following sections (see Figure 6-16: Collection Add Screen - Inventory List). Note that instructions vary depending on each kind of child record to be added!

6.2.2 Explode Options

The following options in the *Inventory List* section are used when adding and/or exploding any level of child records. Once you've selected these options, see the specific instructions below for the type of child record you are adding.

- **Records Already Created Exploded:** This indicates whether child records were exploded previously from this record (Yes/No).
- **Explode on Done?:** Check *Yes* to explode child records when this record is saved.
- **Explode Without Extra Data from Parent:** Click this radio button to prevent extra data from the parent record being copied into field in the child record (*DACS Statement of Principles 7.3*).
- **Auto-number Items in List When Exploded:** Check this box unless you have a specific reason to number child records manually. Note that even if you manually add numbers, child records will not automatically be renumbered and reorganized to accommodate inserted numbers. (For example, if you enter a child record and manually number it “3”, and a child record numbered “3” already exists, the collection will have two records numbered 3, with one appearing in the hierarchy in the original position, and the other at the end of the hierarchy.) See section 6.8 Reordering Records within the Collection Hierarchy for more information on reordering records within the hierarchy.
- **Record Level Name for Items in List:** Click on the down arrow button next to this box to choose a level for your child record. Select the level then click *Paste*. **MSMU only uses “series”, “subseries”, “file”, “item” as names for child records.**



You can also just type part of the level name into the Record Level Name box and press the Tab key. Cuadra SKCA should fill in the rest of the level name.

6.2.3 Using Paste Multiple to Add Multiple Child Records Simultaneously

Multiple child records can be added into the Inventory Worksheet simultaneously by using the “Paste Multiple” button on the top (blue) toolbar of the add or edit screen.

- Before you can use this feature, you must stage the information for the child records in rows and columns in an Excel spreadsheet. Create one row for each child record. Each row should contain one column for every value in the appropriate Cuadra Inventory Worksheet section for the type of child records being added (number of columns will vary depending on the type of child record being entered). **Be sure to create blank columns for unused fields (do not skip any fields even if you don't have data to put in them)!**
- After staging the data in Excel, open the Cuadra record to which you wish to add child fields. Place your mouse cursor in the first field in the appropriate Cuadra SCKA Worksheet section, and left click. Then click the *Paste Multiple* button on the blue toolbar. A text box window appears.
- Back in the Excel spreadsheet, select the range of rows and columns in the spreadsheet that contain the staged data, and copy it to the clipboard (CTRL-C or right click and select *Copy*).
- Paste the contents you copied into the Cuadra text box window (CTRL-V or right click and select *Paste*), then click the *Paste* button on the text box window. A row will appear in the Cuadra Inventory List for every row you copied from Excel.
- Click *Done* to save the child records and explode them if that option was selected.

6.2.4 Adding Series Records to a Collection

The collection record must either be in the process of being added or being edited to use these instructions.

- Fill in the *Explode Options* listed above.
- **Record Level Name for Items in List:** Click on the down arrow button ▼ to select the type of child record being added (series). Select “Series” and click the *Paste* button.
- Use the section entitled *Worksheet for Subgroups or Series* to enter your child record information.
- **Title:** Enter the Series Title. Do not add the folder date to the series title, as Cuadra SKCA will append the Title and Display Date fields when they appear in the Finding Aid. (Note: if the Series Title is bolded, it will show in the Finding Aid on a separate line).
- **Display Date:** Enter the date range that represents all of the contents of all files/items in the series. (See section 2.7 Dates for more information on date formats.)
- To add more series, click the green plus button (+) next to the title box. A new row will be created to fill in.

- When you are finished adding series, click *Done* to save the record and explode child records.

6.2.5 Adding File Records to Series Records

In the *Catalog* → *Edit Catalog* screen, search for the collection to which you want to add file records. Scan through the search results until you find the Series record within the selected collection to which you want to enter Files. Edit the Series record by clicking the Edit button under the record. Once the edit record screen opens, scroll down until you see the *Inventory List* section (or select *Inventory List* from the left sidebar menu). In the *Inventory List* section:

- Fill in the *Explode Options* listed above.
- **Record Level Name for Items in List:** Click on the down arrow button ▼ to select the type of child record being added (series). Select “*File*” and click the *Paste* button.
- Use the section entitled *Worksheet for Files, Items, & Parts* to enter your child record information.
- **Display Date:** Enter the date range that represents all of the contents of all items in the file. (See section 2.7 Dates for more information on date formats.)
- **Box Number:** Enter the number of the box that will hold this file.

6.2.6 Adding Item Records to Series or File Records

In the *Catalog* → *Edit Catalog* screen, search for the collection to which you want to add file records. Scan through the search results until you find the Series or File record within the selected collection to which you want to enter Items. Edit the Series or File record by clicking the *Edit* button under the record. Once the edit record screen opens, scroll down until you see the *Inventory List* section (or select *Inventory List* from the left sidebar menu). In the *Inventory List* section:

- Fill in the *Explode Options* listed above.
- **Record Level Name for Items in List:** Click on the down arrow button ▼ to select the type of child record being added (series). Select “*Item*” and click the *Paste* button.
- Use the section entitled *Worksheet for Files, Items, Parts* to enter your child record information.
- **Display Date:** Enter the date of the item. (See section 2.7 for more information on dates.)
- **Box Number:** If items reside inside a box without being inside a file in the box, enter the number of the Box that will hold this item. If the item is in a file that already has a box number, do not enter a box number for the item.
- **Extent / Page Count:** Enter the total pages for the item (if applicable).

6.3 Editing Child Records to Add Other Relevant Information

After you create child records using the Explode method, be sure to edit the child records to add information in relevant fields if that information differs from that of the parent record. For example, if the file represents materials from a single creator, and biographical information about that creator is not in the collection record, add biographical information for the Creator in the file record. If the collection is being catalogued at an item level, item records for books and journal articles may require Dublin Core Metadata Initiative (DCMI) field information, EAD date information, publisher name, etc. Series and lower records may require electronic resource information such as URLs. Do not add information that is already at a higher level of description, such as restrictions etc., unless it is different for this child record (*DACS Statement of Principles 7.3*).

6.3.1 Editing Identifying Numbers in File and Item Records

Under some conditions, you may wish to change the identifying numbers (File number, Item number and/or Box number) for a File or Item record. **Note that changing these numbers will not reorder records in the hierarchy** (see section 6.8 Reordering Records for more information on how to change the hierarchical order). To change the identifying numbers:

1. Edit the Item or File record.
2. Scroll down in the Edit screen or select *Identifying Numbers* in the left sidebar menu until you see the *Identifying Numbers* section (see Figure 6-17: File/Item Edit Screen - Identifying Numbers).
3. Edit the file or item number in the *File Number* or *Item Number* text box.
4. If appropriate, edit the box number in the *Box Number* text box. **If you change a Box number, remember to update the Box List in the Scope & Contents field in the associated Collection record as necessary.**
5. Click the *Done* button to save the record.

Figure 6-17: File/Item Edit Screen - Identifying Numbers

The screenshot shows a software interface for editing a record. At the top, there are buttons for 'Done', 'Cancel', 'Close', and 'Help'. Below these are 'Paste Multiple', 'Undo', and 'Redo' buttons. The main area is titled 'Editing Record Number: 254 [view in Hierarchical Context]'. On the left, a 'Field List' sidebar shows a tree view with 'Identifying Numbers' selected. The main content area has a section for 'Identifying Numbers' with a 'Preferred Display Number/Label (optional)' field. Below this, there are four input fields: 'File Number' (containing '2'), 'Item Number', 'Barcode', and 'Box Number'.

6.3.2 Adding Dublin Core Fields for Item Records

When adding journal articles, books, maps and other published materials cataloged at the item level, you may wish to add Dublin Core fields to each item record. See section 1.2 References for a link to the DCMI web site for examples of bibliographic citation data mapped to DCMI fields. See also the Cuadra SKCA Manual Part C (Catalog) for specific information about Cuadra SKCA fields used for DCMI metadata. And for more information on Dublin Core information for journal articles, see <http://dublincore.org/documents/dc-citation-guidelines/>.

The following list shows fields in an Item level record that can be edited to enter DCMI data. Not all fields will apply to every type of item:

- **Title:** This field maps to dc:title.
- **Display dates:** Enter as usual.
- **Creators:** Maps to dc:creators. Enter as usual.
- **DC Other Contributors:** If applicable, use this field to enter one or more other contributors to the article that are not Creators.
- **DC Publisher:** Select a publisher from the *Name Authority* (group) list using the drop list next to this field. (If the publisher name is not in the list, see section 7.3 for more information on adding corporate Name Authority records.)
- **DC Dates / qualifier:** Enter the publishing date and select “*issued*” as the type. This date will be used in EAD Files, so be sure to use date formats that conform to DACS standard (see section 2.7 Requirements & Standards – Dates for more information) (*DACS*).
- **Media Type:** Use “*Manuscript*” for journal articles, books, etc.
- **DC Format:** Only use this field if it will be useful in describing an item beyond its extent and media attributes, e.g., dimensions of an object in an image being described or the duration of a recording. See Using Dublin Core – The Elements – Format (*DCMI2*) for more information.
- **Description:** In this field, include the full APA-style citation for the article. Also include a short description of contents. Ex: “Sloper, D. (2008). The last zanja. West Adams Heritage Association Newsletter, 26 January 2008. Don Sloper article about the Los Angeles zanja (aqueduct) system.” In this way, MSMU will have a full APA bibliographic citation somewhere in the record. A full APA citation is included in this field because the Cuadra SKCA fields associated with Dublin Core elements split up the citation into several fields, meaning that no full citation string is available.
- **DC Description - Table of Contents:** The Table of Contents field is a DC extension of the Description field. If the Table of Contents is desired for a journal, magazine or book, enter one or more rows to describe the book Chapter Names, journal article names and authors, etc.

- **DC Coverage Unqualified, DC Coverage Qualified - MARC Geographic Area, DC Coverage Qualified – Other/qualifier:** Use the three DC Coverage fields to include coverage information (especially for maps). Coverage will typically include spatial location (a place name or geographic co-ordinates), temporal period (a period label, date, or date range) or jurisdiction (such as a named administrative entity). Recommended best practice is to select a value from a controlled vocabulary (for example, the *Getty Thesaurus of Geographic Names*). Where appropriate, named places or time periods should be used in preference to numeric identifiers such as sets of co-ordinates or date ranges. Coverage fields should be selected from a drop list (where applicable), which will retrieve records in Cuadra SKCA Authority fields for Geographic Locations, etc. (See section 7.4 Places/Geographic Locations Authorities for more information on adding Geographic fields.)
- **DC Resource Type:** For books, journal article, magazines, etc. use “*text*”.
- **DC Resource Identifier/qualifier:** For books, journal articles, etc. choose the qualifier “*bibliographic citation*” and enter only the section of the *APA* bibliographic citation containing Journal, Volume, Issue, Pages. The *APA* citation should not have a “Retrieved from” URL because for analog collections items described will be paper, and for digital items collection user restrictions may prevent access in that manner. This field should be approved by the MSMU archivist. For books, an ISBN may also be entered here using the qualifier “*ISBN*”.
- **DC Audience:** This field maps to the Dublin Core - Audience field. Use only if requested (*DCMI2*).
- **DC Rights Management:** Not used at this time.
- **DC Relation/qualifier:** For journals or magazines, if the ISSN appears in the URL for the item, enter the ISSN in this field. Use “*dcTerms: IsPartOf*” as the qualifier.
- **DC Source:** Not used.

6.4 Adding a New File or Item to an Existing Collection

One of the most common tasks in Cuadra SKCA that will be performed on an ongoing basis is adding a File or Item record to an existing collection. This description refers to sections already in this manual, but is included as a quick reference of steps for this task.

1. Use *Catalog* → *Edit Catalog Records* to search for the Collection record.
2. View the existing hierarchy of the collection to determine where in the collection the new File or Item should reside. If you are adding a File, it will probably need to be added as a child record under an existing Series. If you are adding an Item, it may need to be a child record of an existing Series or File. However, either type could need to be part of a new Series rather than an existing one.

3. If the File or Item needs to be in a new Series edit the Collection record to add a new Series (see section 6.2.3 Adding Series Records to a Collection).
4. If the File or Item needs to be a child record of an existing Series, edit the existing Series record to add a new File or Item (see section 6.2.4 Adding File Records to Series Records OR section 6.2.5 Adding Item Records to Series or File Records).
5. If a new Item record needs to be a child record of an existing File, edit the File record and add the Item (see section 6.2.5 Adding Item Records to Series or File Records).
6. When you add a Series, File, or Item to an existing collection, new records will be added at the end of the hierarchy. You may need to rearrange the records into the correct order in the hierarchy (see section 6.8 Reordering Records within the Hierarchy).
7. After approval of the records by the Archivist, release all records to the public (see section 6.5 Releasing Records to the Public).
8. Recreate the EAD Finding Aid (see section 6.7 Defining and Creating EAD Finding Aids).

6.5 Releasing Records to the Public

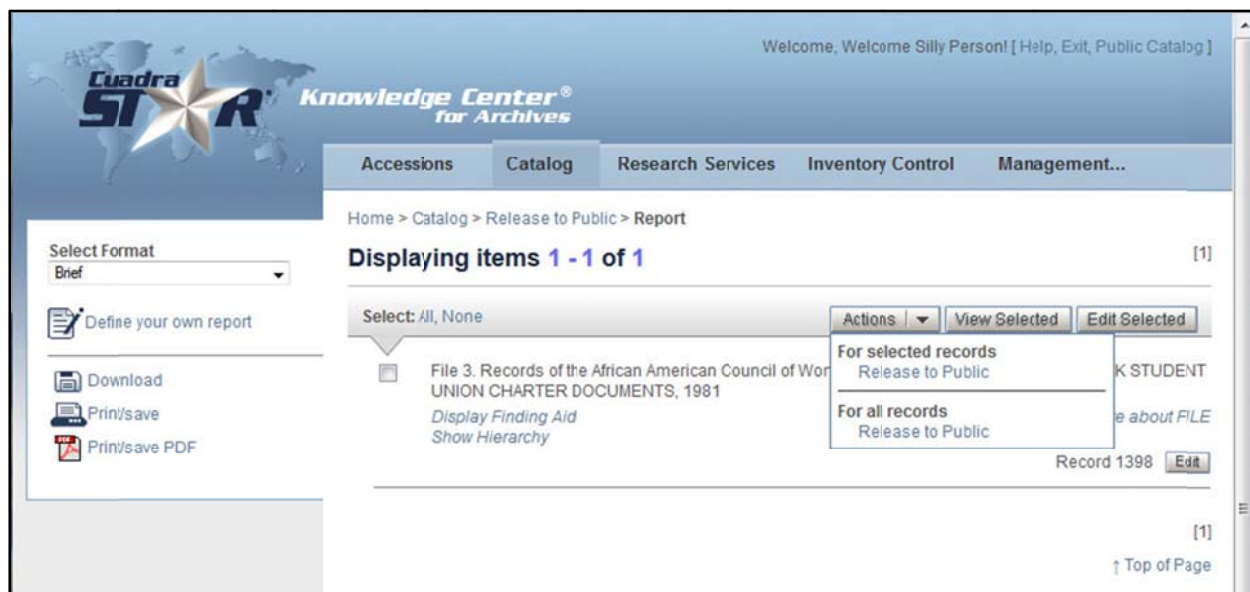
All records for collections are invisible in the Public catalog until they are released for public access. Records can be released individually or in groups. To release records to the Public catalog:

1. Select *Catalog* → *Release Records For Public Access*.
2. On the *Release Search* screen (see Figure 6-18: Catalog - Releasing Records to the Public - Search) there are two ways to select records for release:
 - a. Search for the records using the normal search controls, OR
 - b. Select the left menu option *All Not Released For Public Access*, which will find all records in all collections that have not yet been released. Note that if no records are currently ready to be released, your search will not receive any hits.
3. On the *Release to Public Detail* screen (see Figure 6-19: Catalog - Release Records to the Public - Detail Screen), you can release all the records found, or further limit the selection of records to be released:
 - a. To release all records returned by your search, select *Actions* → *For All Records* → *Release to Public* from the *Actions* drop menu.
 - b. To further limit the selection of records, click the checkboxes next to the records you want to release. Then select *Actions* → *For Selected Records* → *Release to Public* from the *Actions* drop menu.
4. Click *OK* to finish the release process. A message will appear telling you how many records were released.

Figure 6-18: Catalog - Releasing Records to the Public - Search

The screenshot displays the 'Quadra STAR Knowledge Center for Archives' interface. At the top, there are navigation tabs for 'Accessions', 'Catalog', 'Research Services', 'Inventory Control', and 'Management...'. The breadcrumb trail reads 'Home > Catalog > Release to Public'. The main heading is 'Release Records for Public Access', with 'Records retrieved: .'. Below this, there are two search modes: 'Assisted Search Mode' (selected) and 'Expert Search Mode'. The search area includes a 'Search & Display' button and a 'Clear' button. A note says 'enter lists of terms separated by semicolons'. There are three dropdown menus for 'Collection Code Names', 'Repository Numbers', and 'Accession Numbers'. Below these are search criteria sections for 'Titles', 'Names (Creators/Contributors/Donors/Sources)', and 'Subjects', each with an 'exact match' and 'across all levels' checkbox. A 'Year (or range) from' field with 'BC' checkboxes is also present. At the bottom, there are expandable sections for 'Additional Search Options', 'Administrative Searches', 'Identifying Numbers', and 'Record History'. On the left sidebar, there is a 'Quick Search' section with a red circle around the text 'All Not Released for Public Access'. Below it are 'Saved Searches' and 'New Saved Search' options.

Figure 6-19: Catalog - Release Records to the Public - Detail Screen



6.6 Attaching Collections to the Repository Record

Before a collection will appear in the public catalog, it must be linked to the correct Repository record in Cuadra SKCA. MSMU currently uses one repository (“MSMU-LA”). Repository records are created using the *Management* → *Application Management* section of Cuadra. See the *Cuadra SKCA Manual Part D Management* for more information on creating Repository records.

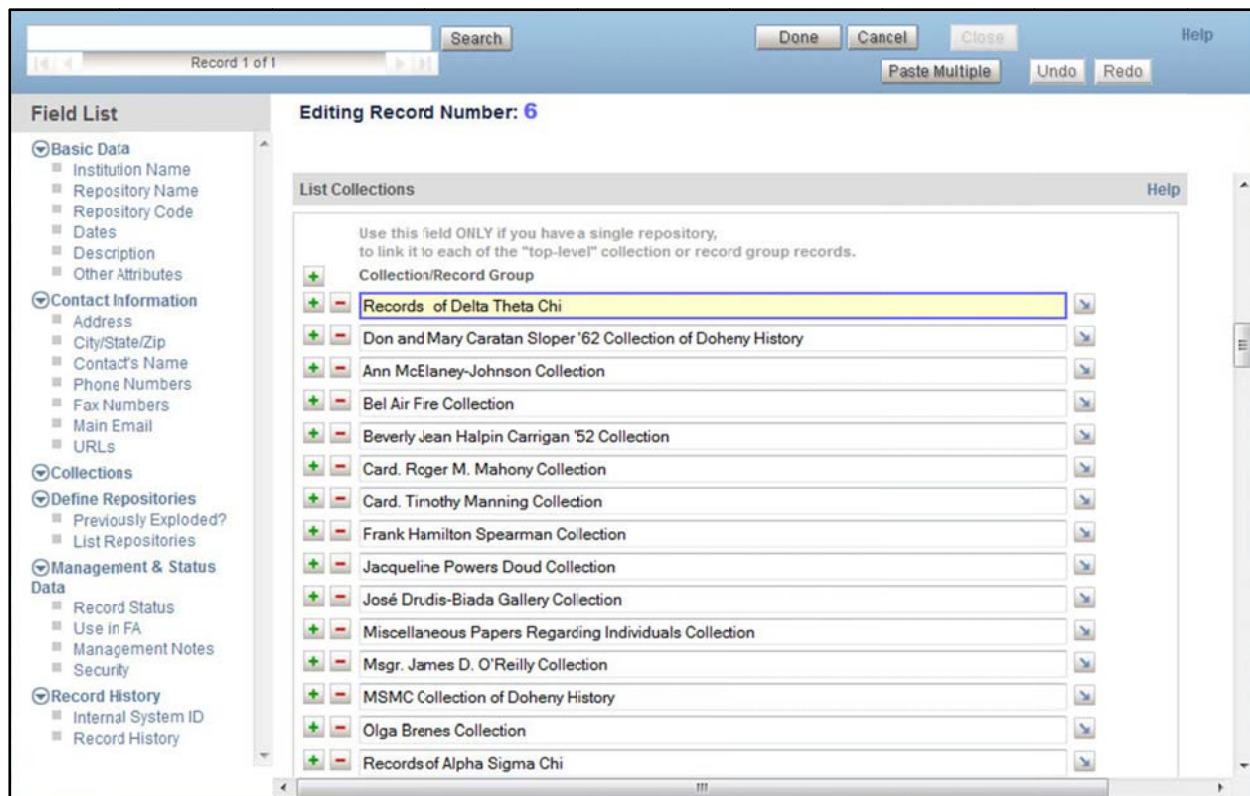
To link a collection to the Repository Record:

1. Under *Management* → *Application Management* → *Repository Records* select *Edit Repository Records*.
2. Click on the down arrow ▼ button next to the *Repository Name* text box. Check the box next to repository name “MSMU-LA” and click the *Paste* button. Then click the *Search & Display* button.
3. Edit the repository record by clicking on the *Edit* button below the record.
4. In the edit window, scroll down (or click *Collections* in the left menu bar) to get to the *List Collections* section (see Figure 6-20: Application Management - Edit Repository Records). Create new row in this section by clicking on one of the plus buttons (+). Using the drop list next to the new row, select one or more collections to link by clicking on the checkboxes next to the collections. (**Note that collections are listed by their assigned short name, not their title.**)
5. Click the *Paste* button. All of the collections you selected will be added to the *List Collections* section. Note that the new items are **sorted in the order you added them**,

not necessarily in the order they are listed in the drop list. There is no way to resort the list except by adding and deleting collections in order.

- Click on the *Done* button to save the record.

Figure 6-20: Application Management - Edit Repository Records



6.7 Defining and Creating EAD Finding Aids for Collections

Cuadra SKCA collection finding aids can be stored in EAD format (for more information on EAD format, see section 2.1.4 Use of Standards – EAD). Defining and creating EAD finding aids requires performing a series of steps under Management functions. EAD finding aids should be generated for each collection in Cuadra SKCA. Each collection can have more than one EAD finding aid attached to it. MSMU EAD finding aids should be stored on the Star System Web Site servers.

Once EAD finding aids are generated, they can be accessed by clicking a link in the collection finding aid in Cuadra SKCA, in either the staff or public versions of the Cuadra SKCA web site.

Note that every time you edit any record in a collection, you have to regenerate the EAD Finding Aid to see the changes. Since you can have as many versions of the EAD Finding Aid as you want, if you generate a new one you may want to delete the old one (see section 6.7.3 Editing Electronic Finding Aid Data in Collection Records). **For this reason, adding a date to the link URL for the EAD finding aid is advised.**

6.7.1 Defining EAD Finding Aids

This section defines the properties of the EAD finding aid. Please do not change any fields other than those listed below.

1. Select *Management* → *Application Management* → *EAD Files* → *For Collections* → *Define EAD Finding Aid Properties*. The *Collection EAD (Define EAD Finding Aid Properties)* screen will open (see Figure 6-21: Application Management - Define EAD Finding Aid Properties).
2. Under the *Upload Automatically to STAR System Web Site* section, type in the collection name or select the collection name by clicking on one of the down arrows (▼) next to the *Collection Name* box, then click the *Paste* button.
 - a. The unlabeled down arrow opens a selection window to access collection names alphabetically by the name that was entered in the collection *Title for sorting in collection lists (optional)* field. You can click on the alphabet links to view collections starting with a specific letter (e.g., for the Don and Mary Cataran Sloper Collection, click “S” for “Sloper Collection”, the title that was entered for sorting. Click the radio button next to the collection desired then click the *Paste* button.
 - b. The *Search* down arrow opens a window that allows searching by wildcard or expressions. Enter the text you want to search and click the *Search* button. Then click the radio button next to the collection desired, and click the *Paste* button.
 - c. The selected collection record number will be automatically entered in a text box next to the search buttons.
3. Under *File Name to Assign to EAD File (use .xml extension)*, enter a file name for the EAD file. MSMU EAD file names should contain the collection number without dashes, an underscore (“_”), and the date in the format YYYYMMDD (ex: “CLMSMUS300_20141016”). **Remember that if you do not uniquely name the file, it will be overwritten the next time you generate it!**
4. In the *Link Text* textbox, enter the URL (link) text that you want to see in the final *Finding Aid* window in Cuadra SKCA. Link names should include both text and **the date the EAD finding aid was defined** (ex: “EAD Finding Aid 10/16/2014”).
5. Make sure that the *Include Link in Catalog Web Session* checkbox is checked.
6. Click the *Done* button to save the definition.

Figure 6-21: Application Management - Define EAD Finding Aid Properties

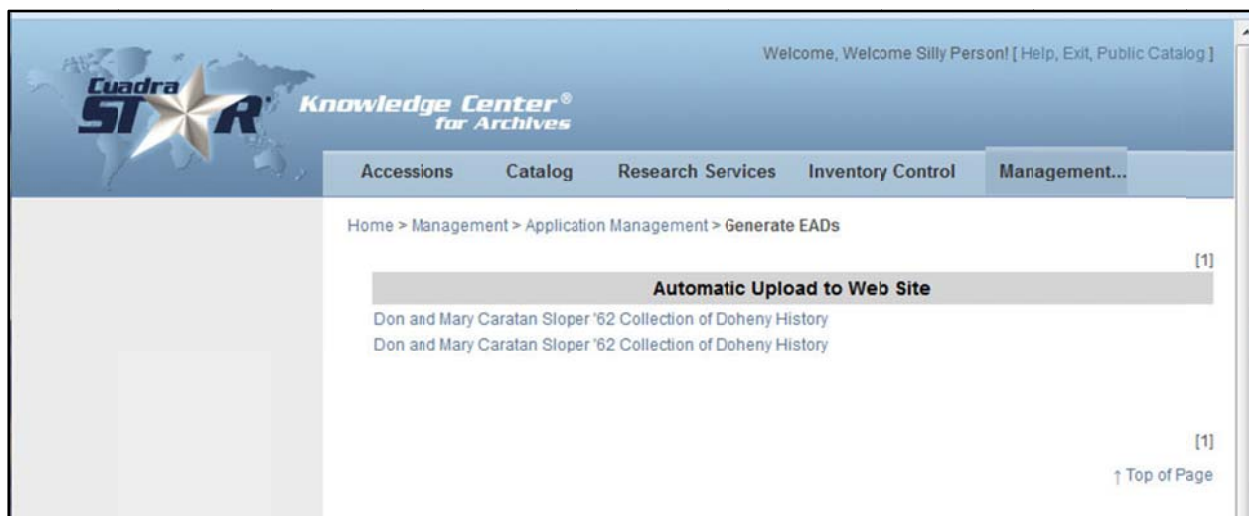
6.7.2 Generating EAD Finding Aids

After the EAD finding aid properties are defined, use this function to actually create the EAD file.

1. Select *Management* → *Application Management* → *EAD Files* → *For Collections* → *Generate EAD Finding Aids*.
2. A list of current definitions for finding aids (sorted by collection name) will appear (see Figure 6-22: Application Management - Generate EAD Finding Aids). Click the finding aid definition you just created above.
3. When the EAD file is generated, the message will appear:

The EAD for the specified Collection has been generated, and the corresponding Collection record has been updated in the Archives Catalog.
4. After you generate the EAD, go to the Catalog menu and open the main record for the collection. Click *Display Finding Aid*. The link to the EAD finding aid should appear in the top right corner of the finding aid.

Figure 6-22: Application Management - Generate EAD Finding Aids



6.7.3 Printing and Displaying an EAD Finding Aid

To save a copy of the EAD finding aid in its styled version (roughly as it appears when displayed), display the EAD finding aid in the browser by clicking on the link in the Collection record, then print the resulting web page to a PDF file using your browser's print controls.

If you wish to save a copy of the EAD finding aid source XML code for later viewing (unstyled), you can do so by viewing the source of the displayed finding aid via your browser. Be aware that the resulting XML file can be viewed in a browser or text editor, but it will not be styled like the finding aid that appears in Cuadra SKCA, but only as raw text. (These steps assume the use of Mozilla Firefox browser.) To do this display the EAD finding aid in the browser by clicking on the link in the Collection record. Then:

1. Right click on the browser window, and select *View Page Source*. Wait until the page draws. You should see some line numbers and the first line should include the text “<?xml...”.
2. In the browser, select *File* → *Save Page As*. Save the page to the desired directory with an .XML file extension.

These instructions are non-standard for Cuadra SKCA and for the MSMU Archivist only. If you understand XML and XSL files, keep reading. If not, stop here. These rough instructions are only included as a reminder how this step is done. You can basically style the EAD finding aid in XML format to look like Cuadra SKCA shows it if you apply the special MSMU-edited XSL and CSS style sheets and make them available in the same file as the XML file.

1. The original Cuadra SKCA .XSL stylesheet file can be downloaded by navigating to <https://MSMU.cuadra.com/star/EAD/cuadraskca.xsl> in your browser, and saving the resulting file. However, it will not apply .css style sheets correctly due to server path issues. A version of the XSL file named “cuadraskca_NLSEdited.xsl” that will correctly

reference specially edited CSS files, along with the special CSS files themselves, is available in the share drive in the ArchiveZ\CuadraSKCA\EADStylesheets folder.

2. To reference the XSL style sheet, edit the line in the EAD XML file with the text “xml-stylesheet”. Change the value in quotes after “href” to “cuadraskca_NLSEdited.xml” and save the EAD XML file. For the style to work, the “cuadraskca_NLSEdited.xml” file, the “NLS_ead-core.css” file, and the “NLS_ead-print.css” file must be in the same folder as your EAD XML file.
3. Open the edited EAD XML file with Firefox. A styled version of the XML file will appear that approximates the Cuadra SKCA styled version.
4. Note that some special characters may not render correctly, and cause errors. If you open the XML file using Firefox browser, it will report where the error occurs (IE browser will not tell you). You can then edit the EAD XML file to change the offending character if desired. Some characters known to cause this are copyright symbols, and non-English vowels and consonants such as “ö” or “è”.

6.7.4 Editing Electronic Finding Aid Data in Collection Records

If an EAD finding aid in a collection record is outdated and needs to be deleted, or you accidentally generated the finding aid twice resulting in two links in the finding aid, or you need to change the link text, you can use this function to edit the EAD finding aid information for the collection record.

1. Select *Management* → *Application Management* → *EAD Files* → *For Collections* → *Edit Electronic Finding Aid Data in Top-level Collection Records*.
2. Use the *Search* screen to retrieve the Collection record desired.
3. Click *Edit* to edit the Collection record. The *Edit Electronic Finding Aid Data in Top-level Collection Records* window will appear (see Figure 6-23: Application Management – Edit Electronic Finding Aid Data in Top-Level Collection Records).
4. To delete an EAD finding aid link, click on the minus sign (-) above the row you wish to delete.
5. To change the link text, edit the *Link Text* field. Make sure that the *Include Link in Web Session* checkbox is checked so that your link text appears in the Cuadra SKCA finding aid.
6. Use the *Management & Status Data* section to record that you edited the record.
7. Click the *Done* button to save the record, and the *Close* button to close the edit window. **Note that if you do not close the edit window, your changed finding aid information will not appear in the collection record.**

Figure 6-23: Application Management – Edit Electronic Finding Aid Data in Top-Level Collection Records

The screenshot shows a web-based application interface for editing record data. At the top, there is a search bar and navigation buttons (Done, Cancel, Close, Help). Below the search bar, the record number '233' is displayed. The interface is divided into a 'Field List' on the left and a main editing area on the right. The 'Field List' includes categories like Basic Elements, Electronic Finding Aids, Management & Status Data, and Record History. The main editing area is titled 'Top-Level Catalog Record' and contains two sections: 'Basic Elements' and 'Finding Aids'. The 'Basic Elements' section includes fields for Title, Display Dates, Assigned Name for Hierarchy, and Repository/Catalog Number. The 'Finding Aids' section contains two entries, each with fields for Update Type, File Name (or URL), SFS Repository, Date, ID/Publication Number, Link Text, and Note/Remarks.

6.8 Reordering Records within the Collection Hierarchy

Adding or deleting records in the collection hierarchy may require reordering the records in the hierarchy. New records are added at the end of the hierarchy for the parent item, not necessarily in the place within the hierarchy where you want them to appear. To reorder records in the hierarchy:

1. Select *Catalog* → *Other Tasks* → *Reorder Records within the Hierarchy*. The *Reorder Records in the Hierarchy* window will appear (see Figure 6-24: *Catalog - Reorder Records Within the Hierarchy*).
2. Use the down arrow or Search down arrow (⌵) buttons to locate the collection who's hierarchy you wish to reorder. Once you select a single collection, the *Collection Details* window will appear (see Figure 6-25: *Catalog - Reorder Records - Collection Details*).
3. In the *Collection Details* window, select which level of the hierarchy you wish to reorder. To open the hierarchy tree to see lower levels, click the plus (+) button next to the tree row. Click the radio button next to **the level above** the records you want to reorder. For

example, to reorder series in a collection, select the collection; to reorder files in a series, select the series; to reorder items in a file, select the file, etc. Click the *Paste* button.

4. The *Re-order Records in the Hierarchy Record List* window appears (see Figure 6-26: Catalog - Reorder Records - Record List).
 - a. To move records up or down in the hierarchy, click on one of the editable boxes in the row you want to move (*Subgroup*, *Series*, *Box*, *File*, or *Item*), then click Alt-Up Arrow (↑) or Alt-Down Arrow (↓) on the keyboard.
 - b. To renumber hierarchy elements when you are done moving them into the correct position in the hierarchy, simply type a number in the editable textbox that matches your record type (e.g. for file numbers, edit the File column, etc.).
 - c. You can enter or edit box numbers under some conditions. However, under some conditions you must edit the child records individually to add box numbers or change the identifying number (see section 6.3.1 Editing Identifying Numbers in File and Item Records).

Figure 6-24: Catalog - Reorder Records Within the Hierarchy

The screenshot shows a software interface for reordering records. At the top, there are buttons for 'New', 'Done', 'Cancel', 'Close', 'Paste Multiple', 'Undo', 'Redo', and 'Help'. The main window title is 'New Record Number: 38'. On the left, a 'Field List' shows a tree structure with 'Re-orderRecords' expanded to show 'Collection' and 'Sub-Levels'. The main content area is titled 'Re-order records in the hierarchy' and contains a section 'Re-order Linked to Records in the Hierarchy'. This section includes a picklist for 'Collection' and a search field for 'Parent (whose levels below are to be re-ordered)'. Below this is a table with columns for 'Title', 'Subgroup', 'Series', 'Box', 'File', 'Item', and 'RECID', each with an input field and a '+' or '-' icon.

Figure 6-25: Catalog - Reorder Records - Collection Details

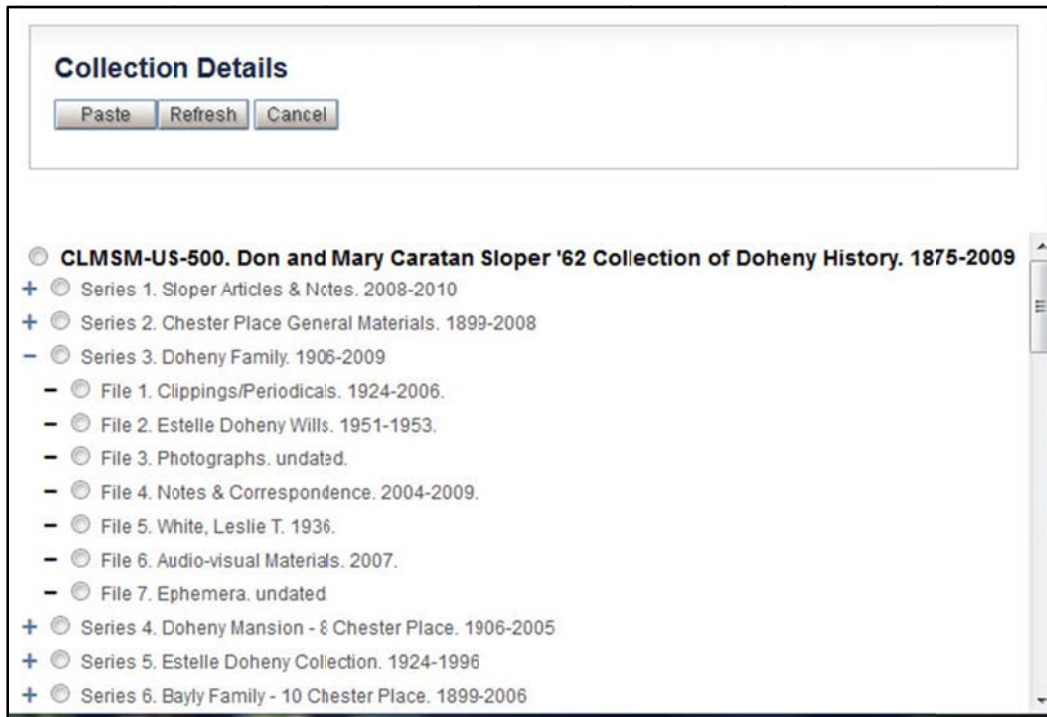


Figure 6-26: Catalog - Reorder Records - Record List

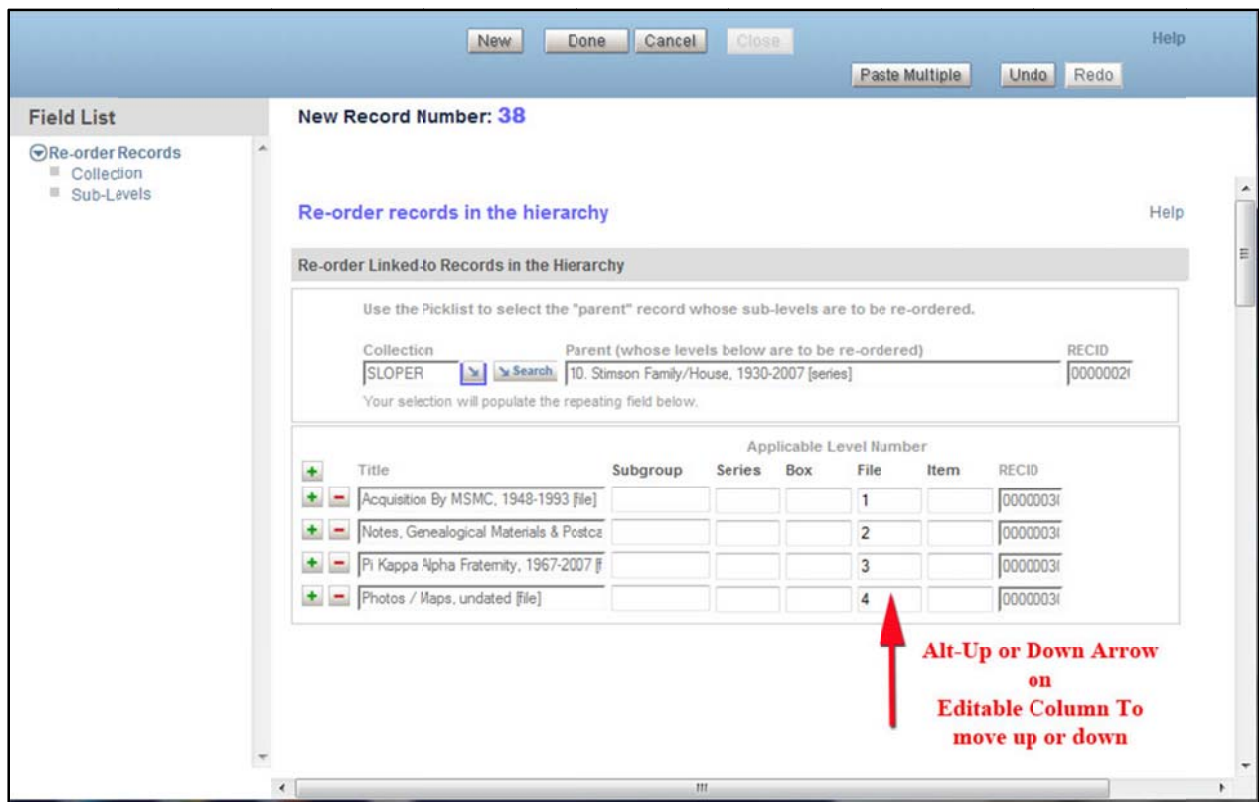


Figure 6-27: Catalog - Unlink or Delete Catalog Records

Record 1 of 1

Search Done Cancel Close Help

Paste Multiple Undo Redo

Field List

- ☑ Title Information
 - Title
 - Record Type
- ☑ Actions
 - Deletions
 - Keep a backup
- ☑ Record History
 - Internal System ID
 - Record History

Editing Record Number: 254 [View in Hierarchical Context]

Unlink or Delete a Catalog Record Help

Title Information

Title: Maps Assigned Name for Hierarchy: SLOPER
 Record Type: level 4 Record Level: file
 Repository/Catalog Number: CLMSM-US-500
 Folder/File Number: 2

Actions

What should be deleted?

- jus! THIS RECORD (mark any children as Orphans)
- THIS RECORD and all of its children
- theLINK from this record to its parent (mark THIS RECORD as an Orphan)
- IGNORE (do nothing)

Keep a backup copy of this deleted record?

Record History

Internal system ID: 00000272

Record Created		
Date	Time	User
2013 11 04	19:47:59	nsteinmarn

Record Updated		
Date	Time	User
2013 11 23	12:29:25	nsteinmarn

6.9 Unlinking or Deleting Catalog Records

It may be necessary to delete a catalog record, or unlink a child record to its parent record, and relink it to a different parent record. Use this function to perform these tasks. Remember that changing records in the hierarchy may necessitate reordering the hierarchy (see section 6.8 Reordering Records within the Hierarchy for more information). To perform these tasks:

1. Select *Catalog* → *Other Tasks* → *Unlink/Delete Catalog Records*.
2. Search for the collection from which you wish to delete or unlink records.
3. Once the list of items is displayed, either edit a single record, or select one or more items to delete or unlink by checking the checkboxes next to the records and clicking *Edit Selected*. The Unlink or Delete Catalog Record screen will appear (see Figure 6-27: Catalog - Unlink or Delete Catalog Records).
4. Under *Actions*, select the action you want to perform on the record:

- a. *Just this record*: **DELETES** the record selected.
 - b. *This record and all of its children*: **DELETES** the record and all child records beneath it in the hierarchy. **Use this option with caution!!**
 - c. *The link from this record to its parent (mark THIS RECORD as an orphan)*: This option **UNLINKS** the record from its parent. If the record has child records, all child records beneath this record will also become orphans and must be relinked to a new parent record.
5. *Keep a backup copy of this deleted record*: Always leave this checkbox checked.
 6. When you have finished editing the record, click *Done* to save your actions. Note that if you had opted to edit more than one record, you can click the record selector arrows in the top left of the screen to move through your selected records. **Using the arrow keys will save any changes you have selected exactly as if you pressed the Done button!!**

6.10 Relinking Orphan Catalog Records

If you have unlinked catalog records, or created child records without using the “Explode” method, you may need to link a child record to a parent record.

1. Under *Catalog* → *Edit Catalog Records*, select the link *All Orphans* from the report list in the left sidebar. This will list all records in the system without a parent.
2. Within the list of orphan records, click the checkbox next to the records you wish to link, then click *Edit Selected* (or *Edit* for only one record).
3. Within the Edit screen for each record, click on the *Attach to Collection* section in the left sidebar menu (see Figure 6-28: Collection Edit - Attach Orphan Record).
4. Check the *Attach Without Extra Parent Data* checkbox.
5. Click on the *down arrow* button or *Search* down arrow button (▼) next to the *Link to Existing Record* textbox to find the record number of the parent record to which the child record should be attached.
 - a. Using these buttons calls up either a search textbox in which you can put wildcard strings (ex: *300 to bring up collection CLMSM-US-300) or an alpha selection list to select the collection by name.
 - b. Once you have selected a collection, a *Collection Details* window will appear (similar to the one in Figure 6-25: Catalog - Reorder Records - Collection Details) that allows you to choose the child record under the collection that will become the new parent record for the orphan record you are linking. Click the radio button next to the new parent record, and then click the *Paste* button. The parent record number will be automatically inserted into the *Link to Existing Record* text box, and the *Title*, *Display Dates*, *Repository Catalog Number*, and *Assigned Code Name for Hierarchy* fields will fill with information from the new parent record.

(Once you find the parent record number, you can copy it and paste it into other record number fields for subsequent records if needed.)

6. Click Done to save the record. If you are editing more than one record, click the record selection control on the top left menu to move through the child records you want to link. **Moving through child records with this control saves your changes just as if you clicked the Done button!**
7. **Records that you link using this method will appear in the hierarchy in alphabetical order rather than in their original linked order.** If the records that you just linked are out of order in the hierarchy, see section 6.8 Reordering Records within the Hierarchy for information on reordering them.

Figure 6-28: Collection Edit - Attach Orphan Record

The screenshot shows a software interface for attaching an orphan record. At the top, there are buttons for 'New', 'Done', 'Cancel', 'Close', 'Paste Multiple', 'Undo', and 'Redo'. Below this is a 'Field List' on the left with categories like 'Basic Elements', 'Attach to Collection', 'Location', 'Creators & Contributors', 'More Dates', and 'Physical Description'. The main area is titled 'New Record Number: 1399 [This record is not attached to a hierarchy.]'. Below this is a section 'Attach this file/item record to an existing collection' with a 'Help' button. The form includes:

- 'Link to existing record' section with a radio button for 'attach without extra parent data' (selected) and 'attach and replace with data from parent'.
- 'Title' and 'Display dates' text input fields.
- 'Repository/Catalog Number' and 'Assigned Code Name for Hierarchy' text input fields.
- 'Assign the Number for this File/Item' section with a checkbox for 'aaronumber' and two 'OR' options for 'enter the File Number' and 'Item number'.
- 'Additional numbers/labels (optional)' section with 'Preferred Display Number/Label', 'Box Number', and 'Barcode' fields.
- 'record hierarchy' and 'Display Full Hierarchy' text input fields.

7. Authority Records & Drop List Values

Cuadra SKCA allows almost every kind of drop list and authority record in the software to be edited by Staff users. However, this manual will only describe the most common authorities that need to be edited. For more information on other authority records and drop lists, see the Cuadra SKCA Manual Part D Management.

7.1 Languages

The Languages field is used to describe the language of archival materials in the catalog. One or more languages can be selected for any catalog record. The Languages pick list is a list of checkboxes that appears when you click the down arrow button while adding or editing a catalog record Language row. **Only selected language records** that are flagged as *Include in Languages Picklist* (not all available languages in Cuadra SKCA) appear in the checkbox list

Adding an entirely new language record must be done using Management tools. . **Be sure that the language record doesn't already exist before attempting to add a new language record!**

It is possible to flag an existing record not shown in the Languages pick list to appear in the list either via Management tools *Language* → *Edit*, or when entering Languages in a catalog record.

7.1.1 Adding a New Language Record via Management Tools

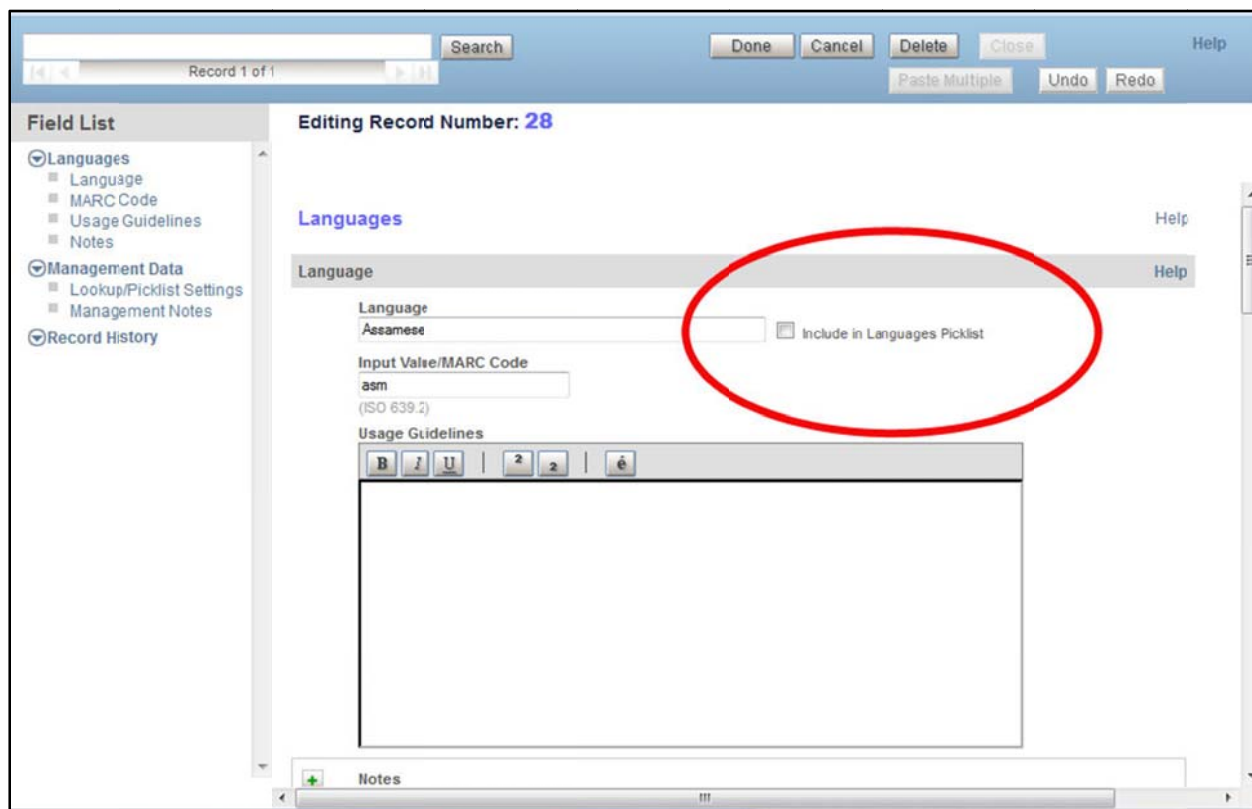
It is highly unlikely that you will need to add a new language that does not already exist in Cuadra SKCA. If the language does not appear in the Languages pick list, use the *Languages* → *Edit* feature (see section 7.1.2) to set the existing record for the language to appear in the list. Before adding a new language, please check the ISO 639.2 standard to retrieve information necessary for the input fields (*ISO*). Then follow instructions in the Cuadra SKCA Part D Management manual to add a language record.

7.1.2 Editing an Existing Language Record to Display in the Languages Pick List

To flag an existing Language record to appear in the *Languages Pick List* via Management tools:

1. Select *Management* → *Authorities* → *Languages* → *Edit*.
2. Retrieve the language record you wish to edit either by entering the language name, or by clicking the down arrow button (▼) next to the Language name text box.
3. If you wish to only edit one Language record:
 - a. When the language record appears, click *Edit*.
 - b. Check the *Include in Languages Picklist* checkbox (see Figure 7-1: Management - Languages - Edit Language). Click *Done* to save the record.
4. If you wish to edit multiple Language records:
 - a. Check the checkbox next to the desired Languages you retrieved via the search.
 - b. Click the Actions button, and click *For Selected Records* → *Add to Picklist* to flag all of the selected records to appear in the pick list. (Note that you can also remove multiple items from the pick list via the Action button.)
5. Verify that the language(s) you edited appears in the *Languages Pick List* window by editing a catalog record *Languages* section and clicking on the down arrow button next to a Language row (see Figure 7-2: Management - Languages - Language Picklist).

Figure 7-1: Management - Languages - Edit Language



To edit the Languages pick list while adding or editing a catalog record:

1. In the catalog record, scroll down or use the left sidebar menu to display the *Bibliographic & Availability Data* → *Languages* section. Use the plus button (+) to insert a new row in the *Languages* section.
2. Type the name of the language that you want to see in the drop list in the new *Language* row.
3. Click the blue down arrow button (▼) next to the Language. The *Languages* window will appear. On the top of the window, click the *Edit Languages* link. If the language name you entered in the text box exists as a Language record, the information for the Language record should appear in the *Language Edit* window (see Figure 7-1: Management - Languages - Edit Language). If the language isn't available, you will see the message: **“No records retrieved or selected. Enter a different search.”**

TIP

If the language doesn't appear for editing, and you don't see the message about “no records retrieved”, try typing the name of the language again in the Search textbox in the upper left of the Edit window, then clicking the Search button.

Figure 7-2: Management - Languages - Language Picklist

Languages
Edit Language Records

Paste Refresh Cancel

- Chinese
- Czech
- Danish
- Dutch
- English
- French
- German
- Hawaiian
- Hungarian
- Italian
- Japanese
- Manchu
- Norwegian
- Portuguese
- Russian
- Spanish
- Vietnamese

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4. Once the Language record appears in the *Edit* window, check the *Include in Languages Picklist* checkbox, then click the *Done* button to save your changes. Note that you may have to close and reopen the Languages Pick List window to see the change (see Figure 7-2: Management - Languages - Language Picklist).

7.2 Locations

For MSMU requirements concerning Locations, see section 2.8. **Remember that Location numbers should be left-zero filled appropriately!!**

Locations are built hierarchically. The lower level of the hierarchy must exist before the next level of the hierarchy is added. For example, a Building record must exist before a Room can be added to that Building; a Room record must exist before a Level 1 record can be added to that Room; a Level 1 record must exist before a Level 2 record can be added to that Level 1 location, etc. At the time of this writing only the MSMU Archives Room (B0009 Room RM0109A) contains records of Level 1 or lower.

Locations can be added to Cuadra SKCA either one at a time (*Single Record*) or as multiples generated automatically using a pattern (*Patterned Records*). Adding patterned records involves defining a range of numbers for each level of the location hierarchy. Cuadra SKCA will then automatically generate all of the records in the range specified.

7.2.1 Adding a Single Location

1. Select *Management* → *Authorities* → *Locations* → *Single Record (+New)*. The *Add A Single Location* screen will appear (see Figure 7-3: Management - Location - Add Single).
2. **Location ID:** This field contains the record id, and will be filled automatically.
3. **Type:** If you are entering a new **Building or Room** record, select a Location type from the drop list. If you are entering any Location **within an existing Room**, do not enter this value (leave field blank). For a new Building record, select Type “*Building*”. For a new Room select the Type appropriate for that Room (see section 2.8.2 Location Types for more information).
4. **Site Building:** Enter a building number.
 - a. If you are creating a new Building record, simply type in the new Building number (Ex: “CHA-B9999”). Then click *Done* to save the record.
 - b. If you are adding a Room or lower level record, select an existing Building from the pick list by clicking on the down arrow (▼) button. Click the radio button next to the room desired and then click the *Paste* button.
5. **Area/Room:** Enter the Room number.
 - a. If you are creating a new Room record, simply type in the new Room number, then click *Done* to save the record.
 - b. If you are adding a lower level record, select an existing Room from the pick list by clicking on the down arrow (▼) button. (The list will only show Rooms in the selected Building.) Click the radio button next to the room desired and then click the *Paste* button.
6. **Level 1 – Level 7:** Enter information for the lower levels of the hierarchy. Remember that each level is dependent on the one above, i.e., you cannot enter a Level 2 unless you have already entered a Level 1, etc.
 - a. If the level you are entering already has higher levels, select the existing higher levels from the pick lists by clicking on the down arrow button next to each level. In the lowest level that will have a new value, simply type in the value. For example, if you are entering a record with level 1, 2 and 3, select existing values for level 1 and 2 and then type in a new value for level 3.
7. When you have entered the lowest level in the new record, click *Done* to save the record.

Figure 7-3: Management - Location - Add Single Record

The screenshot displays a software window titled "New Record Number: 730". The window has a blue header bar with buttons for "New", "Done", "Cancel", "Close", "Paste Multiple", "Undo", "Redo", and "Help". On the left, a navigation pane shows "Basic Data" (Location ID, Building/Room, Levels 1-7) and "Management Data" (Lookup/Picklist Settings, Management Notes). The main area is titled "Locations" and contains three sections: "Basic Data", "Management Data", and "Management Notes".

Basic Data section includes:

- Location ID: B00000136 (highlighted in yellow)
- Type: [Dropdown]
- Site/Building: [Dropdown]
- Area/Room: [Dropdown]
- Level 1 through Level 7: [Dropdowns]

Management Data section includes:

- Lookup/Picklist Settings: Action: Accept, Message: [Text Field]

Management Notes section includes:

- added by: [Text Field]
- date: [Text Field]
- comments: [Text Field]

7.2.2 Adding Patterned Location Records

The Patterned Records function allows you to enter multiple Locations at the same time, by having Cuadra SKCA create them for you. Cuadra SKCA does not allow you to use this feature to create multiple rooms for a building. **Use this function very carefully**, as there is no way to delete multiple Location records simultaneously. If you enter them in error, they must be deleted one at a time!

TIP

When adding Patterned Records, Cuadra SKCA automatically appends all levels you enter together. Remember that when you create a Room record, you have to enter Building as the parent of that room, and Cuadra SKCA creates the new Room ID as Building number + Room number. For example, when building the location Building CHA-B0001 + Room 0100, the Room ID becomes CHA-B0001-RM0100.

When building Patterned Records, this presents a problem. You must select an existing Building and Room to make a patterned record for lower level locations. However, this means that Cuadra SKCA will append the Building ID and the Room ID together resulting in a patterned record with the Building ID listed twice. For example Building ID

CHA-B0001 + Room ID CHA-B0001-RM0100 would produce patterned records beginning with CHA-B0001-CHA-B0001-RM0100—not what you want.

To get the Building number to NOT repeat, temporarily remove the Building number from the Room ID by editing the Room record using the function *Management* → *Authorities* → *Locations* → *Edit*. Edit the Room record's *Location ID* field, removing the Building number part of the ID (ex: just "RM0100"). Create the patterned records using this modified Room number, then when all patterned records are created, change the Room Number back to reference the Building again (ex: "CHA-B0001-RM0100").

Figure 7-4: Management - Location - Add Patterned Records

1. Select *Management* → *Authorities* → *Locations* → *Patterned Records (+New)*. (See Figure 7-4: Management - Location - Add Patterned Records).
2. **Separator:** This field indicates the special character to put between location levels. Select the “-” (single dash) character. **Be very careful to double check that you selected the correct character before proceeding, as this field can be difficult to see clearly, and this character will appear several times in every location record created!**
3. **Site/Building:** Select a Building number from the pick list by clicking on the down arrow (▼) button.
4. **Location Type:** Leave blank.

5. **Room:** Select a Room number from the pick list by clicking on the down arrow (▼) button.

Now complete steps 6-7 for all levels in the pattern.

6. **Prefix:** Enter the prefix for the Level numbers (see section 11.1 for Location prefix abbreviations).
7. **Starting Number and Ending Number:** The starting number for the range of numbers in this level. **Remember that numbers should be left-zero filled appropriately** (see section 2.8.1 Location Designator Formats for more information). Also remember that if you are creating a new filing cabinet, Starting Number should be “00” (not “01”) to include the shelf top as a separate location.
8. **Suffix:** This field is unused by MSMU. Leave blank.
9. Click the *Done* button to generate all of the new Location records.
10. Use the *Management* → *Authorities* → *Locations* → *Edit* function to view the new Location records you added.

The following example assumes that you are creating a new range of shelves for the Chalon Archives (CHA-B0007-RM0109A). The range is numbered 12. There are 3 sections in the range, A, B & C. Each section of the Range includes 7 shelves.

1. Select Separator “-“ (single dash).
2. Select Building CHA-B0007.
3. Select Room RM0109A (see Tip above about removing the Building number in the Room ID before building patterned records.)
4. In Level 1, type Prefix “RG” (no quotes), Starting Number “12”, and Ending Number “12” (you are just creating 1 range).
5. In Level 2, type Prefix “SEC”, Starting Number “A”, Ending Number “C” (this will create sections A, B & C.)
6. In Level 3, type Prefix “SH”, Starting Number “01”, Ending Number “07”.

7.3 Name Authorities

This section describes creating Name authority records. For more information on the requirements governing the use of Name authorities in Cuadra SKCA, see section 2.6 Name Authorities and Subject Terms. The two types of Name Authority records, Individual and Corporate, are entered separately in Cuadra SKCA. **Note that names are not unique, so it is possible to enter two records for the same name in error.**

7.3.1 Individual Names

Individual Name Authority records can be created in two ways: via Management functions or when adding or editing a catalog record.

To add an Individual Name Authority record while adding or editing a catalog record:

1. Select the down arrow (▼) drop list next to the name row to be entered.
2. At the top of the window that appears, a link is available labeled *Create a new name record: Group (or) Individual*. Select *Individual*. This will open the same Names Individual entry screen described below (see Figure 7-5: Management - Names - Individual - Add - Basic Data).

To add an Individual Name Authority record via Management functions, select *Management* → *Authorities* → *Names* → *Individual/Person (+New)*.

7.3.1.1 Basic Data

The Names: Individual entry screen appears (see Figure 7-5: Management - Names - Individual - Add - Basic Data).

- **Last Name:** Enter surname as commonly spelled. Note that if name contains non-Latin alphabet characters (special vowels or accents, etc.), they should be entered. Be aware however that these characters may cause errors in EAD finding aids if the XML transformation does not handle them correctly. Enter hyphens as necessary (ex: “Drudis-Biada”). In the case of dual last names (ex: “Gonzales Ramirez”), use the last name referenced in LCSH authorities or common sources such as Wikipedia.
- **Honorific:** Select an honorific from the drop list if appropriate. See Appendix C for a list of Honorific abbreviations. If the Honorific desired is not in the list, staff users may click the pencil button (✎) next to the field to create a new Honorific.
- **First Name:** Enter only first name. In the case of multiple first names, enter all other names after the first in the *Middle* field.
- **Middle:** Use the full middle name if known. Otherwise use the middle initial. If the middle name has more than one word, or there is more than one middle name, or if a maiden name is used, include all names (ex: Sr. Mary *Germaine of Jesus* McNeil, middle name is “*Germaine of Jesus*”; Beverly *Jean Halpin* Carrigan, middle name is “*Jean Halpin*”; Mary *Irene Vujovich* Ohlfs, middle name is “*Irene Vujovich*”, etc.)
- **Suffix:** Select the appropriate suffix from the drop list. See Appendix C for a list of Suffix abbreviations. If the Suffix desired is not in the list, staff users may click the pencil button (✎) next to the field to create a new Suffix.

Figure 7-5: Management - Names - Individual - Add - Basic Data

New Record Number: 557

Names: Individual

Basic Data

Last Name [] Honoric [] First Name [] Middle [] Suffix []

Enter below the form of name to be used in the catalog; you may wish to add a qualifier to make the name unique. If you leave the field below blank, an official term will be constructed from the data entered in the fields above.

Name (Official Term) []

Treat as anonymous Deceased

Form of Name for Deed of Gift (optional) []

Assigned Code/Identifier (optional) []

Birth Data

Birth Date [] Birth Place [] State/Province [] Country []

Death Data

Date of Death [] Place of Death [] State/Province [] Country []

Affiliation

Biography

Classification []

Record Use []

Aliases/Pseudonyms

Last Name [] Honoric [] First Name [] Middle [] Suffix []

Input Value []

See Also []

- **Name (Official Term):** This name will be used in the catalog and search lists. If you leave this field blank, the official name will be constructed using the individual fields above. MSMU procedure is to always fill out this name. If the LCSH Name authority record lists a specific form for this name, include it in this field, regardless of how individual name parts are completed (*LCSH*). Note that Official names are not unique, so it is possible to enter two records with the same Official name.
- **Treat as Anonymous:** Always leave this field unchecked.
- **Deceased:** If the individual is deceased, check this field.
- **Form of Name for Deed of Gift:** Leave blank unless directed otherwise by the MSMU Archivist.
- **Assigned Code/Identifier:** Unused by MSMU; leave blank.
- **Birth Date:** Enter the individual's date of birth in the form MM/DD/YYYY, if known. For more information on entering dates, see section 2.7 Dates.
- **Birth Place:** Enter the city in which the individual was born, if known.
- **(Birth) State/Province:** Using the down arrow (▼) pick list, select the state or province in which the individual was born, if known (ex: Alabama, Saskatchewan, County Clare). While you can type into this field, the state/province must be available in the pick list or an error will occur. If the state/province is not found in the pick list, use the link *Create a New State* at the top of the *States/Provinces* pick list window to create a new value in the list.
- **(Birth) Country:** Using the down arrow (▼) pick list, select the country in which the individual was born, if known. Do not simply type a country name into this field! If the country name desired is not in the Countries pick list, use the link *Create a New Country* at the top of the *Countries* pick list window to create a new value in the list.
- **Date of Death, Place of Death, State/Province, Country:** Use these fields to fill in information about the death of the individual using the same requirements shown above for Birth information.
- **Affiliation:** Create one or more rows (using the plus + buttons) describing organizations or groups with which this individual was affiliated. Always use existing Corporate Name Authority formats for names of these groups. If the individual was a religious, include the religious order or archdiocese (ex: "Sisters of St. Joseph of Carondelet" or "Archdiocese of Los Angeles"). If the individual was an administrator, staff, or faculty member of MSMU, include the official name of their associated department (ex: "Mount Saint Mary's University (Los Angeles, Calif.). Department of History & Political Science.", or "Mount Saint Mary's University (Los Angeles, Calif.). Office of the President"). If the individual was affiliated with a fraternal organization at MSMU, include the fraternity name (ex: Mount Saint Mary's University (Los Angeles, Calif.). Pi Alpha Theta."). For

any other outside group affiliation, use the authorized LCSH Name Authority record format if available.

- **Biography:** Enter biographical information for this person, if known. Cite sources for biographical information.
- **Classification:** Select one or more classification values from the drop list that describe this individual's relationship to the materials. For each new value desired, use the plus button (+) to create a new row. It is perfectly possible for an individual to have more than one category relating to MSMU ("ex: *Alumnae*, *Faculty* and *Hierarchy*; or *Alumnae & Donor*). For staff in MSMU Administration, include the value *Executive* in one row. For high level religious personnel (Mother Superiors, Bishops, Archbishops, etc.) include the value *Hierarchy* in one row. Note that these values can control whether the individual appears in other drop lists.
- **Record Use:** This field is used by Cuadra SKCA to restrict other pick lists used during catalog entry. If you don't want to restrict use of this name, leave the field empty. If desired, select one or more values from the drop list. For each new value desired, use the plus button (+) to create a new row. For more information on how Cuadra SKCA restricts catalog fields based on this value, see Cuadra Manual Part D Management section 3.2 Working with the Names Authority.
- **Aliases/Pseudonyms:** Enter any variant formats of this individual's name, including birth name of religious personnel if known. For each new value desired, use the plus button (+) to create a new row.
- **Input Value:** This field can contain a short text string or set of initials that can be used for quick data entry for this individual. Ex: ("Estelle" for "Carrie Estelle Betzold Doheny"). When you enter the input value in a field and click *Tab*, the full Official name will be entered.
- **See Also:** This field can contain other individual or corporate name authority values associated with this individual. For example, under "E. L. Doheny Jr", you might enter "Carrie Estelle Betzold Doheny" for reference purposes. It is possible to simply type into this field, but MSMU requires that values in this field be taken via the pick list from the Name Authority lists.

7.3.1.2 Contact Data and Addresses

- **Contact Data:** These fields are rarely used at MSMU. If desired, they can act as an address book for donors or vendors. Leave blank if not needed.
- **URL/Link Text:** If desired, enter a full URL to embed a link to an outside source for information on this individual. The *Link Text* is the name of the link that will be viewable in the Name Authority pick list.

- **Contact Persons & Addresses:** These repeatable sets of fields can be used to enter address book or mailing information for contacts related to the individual. These fields are not currently used at MSMU.

7.3.1.3 Management Data

- **Management Data:** Use the Added By, Date and Comments fields to enter information about the staff member who added this record, and when and why it was added.

7.3.2 Corporate Names

Corporate Name Authority records can be created in two ways: via Management functions or when adding or editing a catalog record.

To add a Corporate Name Authority record while adding or editing a catalog record:

1. Select the down arrow (▼) drop list next to the name row to be entered.
2. At the top of the window that appears, a link is available labeled *Create a new name record: Group (or) Individual*. Select *Group*. This will open the same Names Individual entry screen described below (see Figure 7-6: Management - Names - Corporate – Add - Basic Data).

To add a Corporate Name Authority record via Management functions, select *Management* → *Authorities* → *Names* → *Group/Organization (+New)*. The Names: Group entry screen appears (see Figure 7-6: Management - Names - Corporate – Add - Basic Data).

7.3.2.1 Basic Data

- **Group/Organization Name:** Enter the name by which you want this group to be searched (ex: Art Department, Gamma Sigma Pi, etc.).
- **Acronym:** Enter an acronym for this group if applicable (ex: “AACW” for African American Council on Women).
- **Name (Official Term):** This is the value that will appear in pick lists for this group name. Please see section 2.6.2 Corporate Name Authority Records for requirements for values entered in this field. (Note: You can also use the drop list next to the field to see examples of existing group names.)
- **Treat as Anonymous:** Leave this field unchecked.
- **Defunct/No longer operational:** Check this field if the group is no longer in operation (for example, for discontinued MSMU fraternal organizations).
- **Use as Default Owner: Leave this field blank!** This field is only checked for a single corporate name record in Cuadra SKCA: currently, the record with value “Mount Saint Mary’s University (Los Angeles, Calif.)”. The official name value in the Default Owner record is automatically entered in the *Owner* field in catalog records.

Figure 7-6: Management - Names - Corporate – Add - Basic Data

New Record Number: 557

Names: Group

Basic Data

Group/Organization Name Acronym

If the name above is not unique, you may wish to edit below to add a distinguishing qualifier.

Name (Official Term)

Treat as anonymous Defunct/No longer operational Use as Default owner

Type of Group

Corporate Author/Institution Family

Form of Name for Deed of Gift (optional)

Assigned Code/Identifier (optional)

Operational Dates

Start Date closed on

Account Number

Administrative History

Classification

Record Use

Also Known As/Doing Business As

Input Value

See Also

- **Type of Group:** Select *Corporate Author/Institution*. The value “Family” is not used at MSMU.
- **Form of Name for Deed of Gift:** This value will appear on Deed of Gift forms printed out of Cuadra SKCA. Currently, it is unused at MSMU.
- **Assigned Code/Identifier:** This field is unused at MSMU.
- **Operational Dates:** If desired, enter a Start Date and Closed On date for this organization in the format MM/DD/YYYY.
- **Account Number:** This field is unused at MSMU.
- **Administrative History:** This field is unused at MSMU.
- **Classification:** Choose one or more values from the drop list that represent the relationship of this group to catalog items. Create a new row using the plus button (+) for each new value desired. Examples of use:
 - Academic Department: Use for all MSMU departments.
 - Administrative Group: Use for MSMU administrative offices and committees (President’s Cabinet, Academic Advisement, etc.)
 - Board of Trustees/Regents: Use for committees and offices associated with the Board or Trustees or Regents (ex: Regents Council).
 - Cultural Society: Use for MSMU cultural organizations or fraternities (ex: Hawaiian Club, Campus Ministry, Da Camera Society).
 - Fraternal Organization: Use for MSMU fraternities that are **not** cultural in nature, **not** student chapters of professional groups, **not** service organizations, and **not** honor societies (ex: Delta Tau Delta, Lambda Omicron Chi).
 - Historical Society: Use for any historical society.
 - Honor Society: Use for student honor societies (Kappa Gamma Pi National Graduate Honor Society Chapter, Lambda Iota Tau International Honor Society for Students of Literature Chapter).
 - Professional Society: Use for student chapters of professional societies (ex: Mathematics Council, California Nursing Students' Association Student Chapter).
 - Service Society: Use for student groups organized for the purposes of public service such as campus hostesses (e.g. Delta Theta Chi, Health Advocates, Mount Volunteer Program, etc.).
- **Record Use:** This field is used by Cuadra SKCA to restrict other pick lists used during catalog entry. If you don’t want to restrict use of this name, leave the field empty. If desired, select one or more values from the drop list. For each new value desired, use the

plus button (+) to create a new row. For more information on how Cuadra SKCA restricts catalog fields based on this value, see Cuadra Manual Part D Management section 3.2 Working with the Names Authority.

- **Also Known As/Doing Business As:** Use this field to enter alternate names for this corporate authority. This field should be used for obsolete MSMU department names (only the most current name should be an authority record).

7.3.2.2 Contact Data, Addresses, Management Data

- All other fields for Corporate Name authority records are the same as those for Individual Authority records.

7.4 Places/Geographic Location Authorities

Places/Geographic Location authority records are used when entering information in other records. Adding and editing these records is mostly self-explanatory. See the following notes for special conditions.

To add a new geographic location, navigate to *Management* → *Authorities* → *Places/Geographic Locations*, and then choose the type of location (*Country*, *State/Province*, or *Other*).

- Geographic location names should be taken from authorized LCSH Authority records (*LCSH*).
- Type *Other* can be used to enter Cities, Counties, Regions or Townships if desired.
- When entering any geographic location level lower than country, you will be asked to link the location to a country. For this reason, enter any new country record **before** entering associated states/provinces, counties, etc. in that country.

7.5 Restriction Summaries

Restriction Summary values are used in catalog records to indicate any restrictions on use of collection materials. See Appendix A Boilerplate Text for the most commonly used values. Adding a new Restriction summary is for the most part self-explanatory.

To add a new Restriction Summary value, navigate to *Management* → *Authorities* → *Restriction Summaries* → +New.

7.6 Retention/Terms Statements

Retention Terms/Statements indicate the length of time that collection materials will be retained before deaccession. See Appendix A Boilerplate Text for the most commonly used values. Adding a new Retention Statement is for the most part self-explanatory.

To add a new Retention Statement, navigate to *Management* → *Authorities* → *Restriction Summaries* → +New.

7.7 Subjects

Subjects can be entered into catalog records in two ways: via the Subjects drop list (for topical subjects) or via the Name Authority drop list (for names as subjects). This section explains how to add a new **topical** Subject drop list value. For more information on Subject requirements, see section 2.6.3 Subject Terms. For more information on names as subjects see section 7.3 Name Authorities.

7.7.1 Adding Subject Terms

Adding a new topical Subject record can be done in two ways: while adding or editing a catalog record, or via a Management function.

To add a new Subject when adding or editing a catalog record:

1. Navigate to the Subjects section of the record.
2. Use the plus button (+) to create a new Subject row.
3. Use the down arrow drop list (▼) next to the new row to open the Subjects window.
4. Click the *Create a New Subject* link at the top left of the window. The Subject Terms entry window will appear (see Figure 7-7: Management - Subjects - Add). See instructions below for using this window.

To add a new Subject via the Management function:

1. Navigate to *Management* → *Authorities* → *Subjects* → *+New*. The Subject Terms data entry window will appear (see Figure 7-7: Management - Subjects - Add).
2. **Subject Term (Official Term)**: Type in the Subject term value. For LCSH subject term values, be sure to enter all punctuation (such as ending periods in phrases). For examples of existing terms to match their structure, and to avoid duplicating subject terms, click on the down arrow button (▼) next to this text box.
3. **Type of Term**: Use the value “*topical term*” when creating new topical Subject terms. Use “*geographic name*” only if the Subject is an entirely geographic subject (i.e., “Los Angeles (Calif.)”), and not for terms that have a geographic facet appended (i.e., “Art—Private collections—California—Los Angeles”).
4. **Cross Collection Category?**: Select “No” for this field for all topical, geographic and name terms. For more information on Cross Collection Categories, see section 7.7.2 Cross Collection Subject Categories (Facets).
5. **Input Value**: Use this field if desired to enter a short name for entry of this subject term.
6. **Usage Notes**: This field is currently unused by MSMU.
7. **Date Added**: Enter today’s date.

Figure 7-7: Management - Subjects - Add

New Record Number: 328

Subject Terms

Basic Data

Subject Term (Official Term)

Type of Term

Cross-collection Category? Yes No

Input Value

Usage Notes

Date Added Date Retired

Scope Notes

Management Data

Lookup/Picklist Settings

Action Message

Accept

Management Notes

added by	date	comments

8. **Date Retired:** This field is currently unused by MSMU.
9. **Scope Notes:** Enter “*LCSH authorized subject term*” if the term was taken from LCSH. Enter “*Local term*” for any other term.
10. **Added By/Date:** Enter your name and today’s date in these fields.
11. Click the *Done* button to save the record.

7.7.2 Cross Collection Subject Categories (Facets)

Cross collection subject categories are used by MSMU to group collections into “facets”, i.e. broad subject categories. See Appendix D for a list of MSMU’s cross collection categories, and an explanation of their subject coverage.

To add a Cross Collection Subject category, simply add a Subject term and select the radio button *Cross Collection Category?: Yes*.

Note the following:

- Cross collection categories should only be entered in collection level records.
- More than one Cross Collection category can be entered for each collection. However, current MSMU procedures only use one per collection.
- Cross Collection categories must be approved by the MSMU Archivist before they are added as subject authorities. A master list (Excel spreadsheet) of Cross Collection categories can be found on the MSMU archives share drive.

8. Reporting

Reports in Cuadra SKCA can be generated via several different functions. For a complete description of Cuadra SKCA reporting functions, see the Cuadra SKCA Manual Part C Catalog.

8.1 General Reporting

- Reports are basically generated by first performing a catalog search using the normal search interface, clicking the *Search & Display* button, then using the *Select Format* drop list on the left of the screen to either display those records in a pre-defined or custom report.
- For custom or pre-designed reports, use the *Catalog → Generate Reports & Statistics* function. For reports specifically focused on a catalog item’s Assigned Location, use the *Inventory Control → Generate Inventory Lists* function.
- A *Professional Search Mode* option also exists under the Catalog reporting function, which allows experienced users to search using Boolean queries (see Cuadra manual).
- While Cuadra SKCA menus offer the option to save searches, saved searches, reports and report definitions **only persist during the current login session**, even if they are named.
- Unless you specify otherwise, reports will list all records at all levels. To limit reports to only collection level records, use one of these methods:
 - In Catalog reports, either select *All Level 1 Top Records* in the left side menu, or modify the search by selecting *Administrative Searches → System-assigned level → Collections/record groups* in the search options. Use the latter feature if you want to search using multiple criteria within collection level records.

- In Inventory reports, in the left side menu select *Saved Searches* → *All Top-Level Collections*, then the *Go* button. Once Cuadra SKCA enters the search criteria in the search screen, click the *Search & Display* button.
- Reports can be downloaded in CSV (comma-separated values) text format, HTML or .TXT (plain text) format. Reports can be printed to PDF or HTML or text format. Controls to print files vary depending on the web browser used.

8.2 Catalog Reports & Statistics

These report list catalog records, as well as summary reports of catalog record counts.

8.2.1 Report Formats

The following are the most commonly used report formats for catalog records. For more information about report types see the Cuadra Manual Part C Catalog.

1. **Brief:** This is the default record search format. It shows the record's Title field.
2. **Preview (Staff):** This report form will let you view portions of the finding aid, as well as drill down into the finding aid Biographical/Profile Data section. Report is sorted by Title.
3. **Summary Location Data:** This report is similar to the Inventory List report. It shows the Assigned Location and Location Now for each collection, sorted by collection Title.
4. **Counts reports:** These reports show several different summary reports, for example count of collections by location.

8.2.2 Custom Reports (Define Your Own Report)

Cuadra SKCA allows you to make custom reports, defining what fields you wish to see in the report, sort fields, etc.



TIP

Report definitions made with the *Define Your Own Report* feature cannot be saved. They will only persist until you log out of Cuadra SKCA. While you are in the same login session, you can view the report, modify the search, view again, etc. To modify the report definition, click again on the *Define Your Own Report* link in the left side menu.

Note also that reports are displayed for printing in portrait format. When printing to PDF, reports too wide for the screen can be viewed via horizontal scrolling. However, if you choose fields too wide to be displayed on paper, the report data will be truncated on the right side when printed.

To define a custom report:

1. Select *Catalog* → *Reports & Statistics*.

2. Enter search criteria for the records upon which you wish to report. Click the *Search & Display* button.
3. When the search results appear, click *Define Your Own Report* on the left side menu. The Define Your Own Report window appears (see Figure 8-1: Catalog - Reports & Statistics - Define Your Own Report).
4. If desired, enter a *Report Title* to appear on the top line of the report.
5. Choose the Report Style, *Table* or *Labeled*. *Table* reports appear like a spreadsheet in column/row format. *Labeled* reports appear as a list of rows, similar to the normal search results list.
6. Select one or more fields in the *Fields Available* list by left clicking them and clicking on the *Add ►* button. The field name will be moved right into the *Fields Selected* list. Only those selected fields will appear in your report.
7. To reorder fields in the layout, click on the field you want to move in the *Fields Selected* list and use the *Top of List*, *Up ▲*, *Down ▼* and *Bottom of List* buttons.
8. To select one or more sort fields, click on the field in the *Fields Selected* list and select *Ascending Order* or *Descending Order*. To remove a sort on a field, select the field and click *No Sort*.
9. Click the *Display Report* button to view your report.

Figure 8-1: Catalog - Reports & Statistics - Define Your Own Report

Important fields to know:

- **Identifying Number:** For collection records, this is the collection number (ex: CLMSM-US-300). For other types of records, this is the type of record plus the number (ex: “Series 01” or “File 01”). Note that this **will not show the entire hierarchy for the record**; while it may show you that it is File 01, it will not tell you in what Series the file resides. In some cases, for example, for File records with a Box number in the record, the value may read “Box 01 File 01”.
- **Parent/ID and Child ID:** These fields show the internal record number for the next parent or child of this record in the hierarchy.
- **Collection Name:** This is the collection short name (ex: SLOPER).
- **Title:** This is the full title for the record (ex: “Records of the Art Department”)

- **Sort Title:** This is the sort title entered for the record (ex: “Art Department”).
- **Title in Hierarchy/Time Period:** This is the full Title + the display date + the record type (collection, series, etc.)
- **Title (Other):** This is the value from the *Other/Variant Title* field.
- **Assigned Location:** The location in the archives where this item should reside.
- **Location Now:** The location where the item actually exists (for example, Exhibit, Missing, in Processing). It will not show MSMU room numbers and shelves, etc.
- **Record Level Name:** This is the name of the level of the record in the hierarchy (collection, series, file, item).
- **Record Type:** This is the number of the level of the record in the hierarchy (level 1, level 2, level 4, etc.)
- **Record History:** This is the date created and last updated date for the record.
- **Record ID:** This is the internal record number.
- **Record Status:** This is the work status for the record (complete, in progress, etc.)

TIP

There is no way to create any custom report that will show you records in their hierarchical order. The only way to view records in hierarchical order is via editing a collection record and selecting Show Hierarchy.

It might be tempting to think that you can show the actual hierarchy by sorting by Title + Identifying Number. However, Identifying numbers sort alphabetically by **prefix**, i.e. “File 1” comes before “Item 1” which comes before “Series 1”, meaning the hierarchy is out of order.

8.3 Inventory Reports

Inventory reports are pre-defined or custom reports designed to show location data for catalog records. A summary report showing counts of records in each location is available. Functions of these reports also allow selecting a group of records and flagging them all with a *Location Now* value (i.e., *Assigned Location* or *Missing*). The *Define Your Own Report* function, identical to that under the Catalog reports function is also available.

8.3.1 Basic Inventory Reports

To create or view inventory reports use the function *Inventory Control* → *Generate Inventory Lists*. Enter search criteria for records to display in your report, and then click the *Search & Display* button.

The following report formats are available via the Select Format drop list on the left of the screen:

1. **Summary Location Data:** This report shows the record Title, Record Level (name), the Assigned Location and the Location Now displayed in label format, sorted by record Title.
2. **Counts-Locations:** This report shows record count by location. Note this is **records**, not series, files or items per se. Counts will depend on the search criteria entered for the resulting records.
3. **By Location Now:** This report groups records by Location Now, sorted by Title.
4. **By Assigned Location:** This report groups records by Assigned Location, sorted by Title.

Reports can be downloaded in CSV (comma-separated values) text format, HTML or .TXT (plain text) format. Reports can be printed to PDF or HTML or text format. Controls to print files vary depending on the web browser used.

8.3.2 Using Inventory List Reports to Change the Location Now Catalog Field

When you search for a set of records using the function *Inventory Control* → *Generate Inventory Lists*, you can perform a mass change of the catalog *Location Now* field on selected records. Two possible values can be set: “Assigned Location” or “Missing”. **This feature should be used with care!** It is more advisable to selectively set collection locations using normal catalog edit features.

To use this feature:

1. Select the function *Inventory Control* → *Generate Inventory Lists*. The search screen appears (see Figure 8-2: Inventory Control - Generate Inventory Lists).
2. Enter search criteria for a set of records to change. Remember that at MSMU *Location Now* information is only stored in collection level records, **so you must restrict your search results to collection level records** by checking the box “Collections/record groups” under Administrative Searches section of the report search screen.
3. Check boxes next to any record in the search results for which you wish to set a *Location Now* value.
4. Click the Actions button, and under *For Selected Records* choose either *Set Location Now to “Assigned Location”* or *Set Location Now to “Missing”*.
5. Click *OK* to set all selected records, or *Cancel* to exit without setting.

Figure 8-2: Inventory Control - Generate Inventory Lists

Welcome, Welcome Silly Person! [Help, Exit, Public Catalog]

Quadra STAR Knowledge Center for Archives

Accessions Catalog Research Services **Inventory Control** Management...

Home > Inventory Control > Generate Inventory Lists > Report

Select Format
Summary Location Data

Define your own report

Printsave
Printsave PDF

Displaying items 1 - 30 of 1394 [1] 2 3 4 Next »

Select: All on this page, All on All pages, None

Actions View Selected Edit Selected

For selected records
Set Location Now to "Assigned Location"
Set Location Now to "Missing"

For all records
Set Location Now to "Assigned Location"
Set Location Now to "Missing"

<input type="checkbox"/>	Path/Title:	RECORDS OF DELTA	
	Record Level:	collection	
	Assigned Location:	CHA-B0007-RM0109A-	(RM0109A Archives)
	Location Now:	Assigned Location	
			Record 1240 More Edit
<input type="checkbox"/>	Path/Title:	Records of Delta Theta Chi. GENERAL RECORDS	
	Record Level:	series	
	Sub/Series No.:	1	
	Parent Location:	Assigned location (from above): CHA-B0007-RM0109A-FC10-D01 / Chalon - B0007 Library (RM0109A Archives)	
			Record 1241 More Edit
<input type="checkbox"/>	Path/Title:	Records of Delta Theta Chi - General Records. GENERAL RECORDS	
	Record Level:	file	
	File/Folder No.:	1	
	Parent Location:	Assigned location (from above): CHA-B0007-RM0109A-FC10-D01 / Chalon - B0007 Library (RM0109A Archives)	
			Record 1242 More Edit
<input type="checkbox"/>	Path/Title:	DON AND MARY CARATAN SLOPER '62 COLLECTION OF DOHENY HISTORY	
	Record Level:	collection	
	Assigned Location:	CHA-B0007-RM0109A-FC16-D02 / Chalon - B0007 Library (RM0109A Archives)	
	Location Now:	Assigned Location	

9. Exception Procedures

This section describes the way the system is to be used under abnormal circumstances, e.g., data recovery, during a network failure, etc.

In case of network server failure, archives will locate collections via use of a printed inventory report. Patron requests will be resolved by archivists using this list until system is restored.

Emergency data recovery procedures shall be performed by Cuadra Associates, Inc. as needed.

10. Appendix A – Boilerplate Text

This section lists fixed text statements that should be entered into some data entry fields that always contain the same value, but for which drop lists are not available.

Boilerplate Text		
Module	Field	Statement
Catalog	Preferred Bibliographic Citation	<p>For records use: “Records of the Department of xxx, CLMSM-US-xxx, University Archives, The Charles Willard Coe Memorial Library (Chalon Campus), Mount Saint Mary’s University (Los Angeles, Calif.)”</p> <p>For collections use: “Sr. XYZ CSJ Collection, CLMSM-US-xxx, University Archives, The Charles Willard Coe Memorial Library (Chalon Campus), Mount Saint Mary’s University (Los Angeles, Calif.)”</p>
Catalog	Chain of Custody / Providence	Use: “Material collected by the University Archives.”
Catalog	Current Legal Owner / Title Holder	<p>Use “Mount Saint Mary’s University (Los Angeles, Calif.). Archives.”</p> <p>This has been set as the default owner by checking the “Use as Default” box in this name authority record.</p>
Catalog	Location/Public Access Data	Use: “The Mount Saint Mary’s University Archives are open Monday through Friday from 9 a.m. to 5:00 p.m. for staff, faculty and students and by appointment to external researchers. Archives are housed on the Chalon Campus.”
Catalog	Access Restrictions (Public Statement)	<p>Use: “The collection is open to qualified researchers and does not circulate; i.e., it may not be physically removed from the archives.”</p> <p>If the collection contains student files, may add: “Collection is open for research, except for student files, if any, that may appear in a series. These will be made available at the discretion of the College Archivist.”</p>

Boilerplate Text		
Module	Field	Statement
Catalog	Use/Reproduction Restrictions	Use: "Copying will be done by Archives or Library staff only, and is limited to 25 exposures of physically stable, unbound material per day."

11. Appendix B – Location Information

This appendix contains miscellaneous information about locations, including abbreviations used, the breakout of cabinet / shelf locations in the Archives room, and a map of the Archives room showing all cabinets.

11.1 Location Abbreviations

The following table lists abbreviations used by MSMU in Cuadra SKCA for Location authorities.

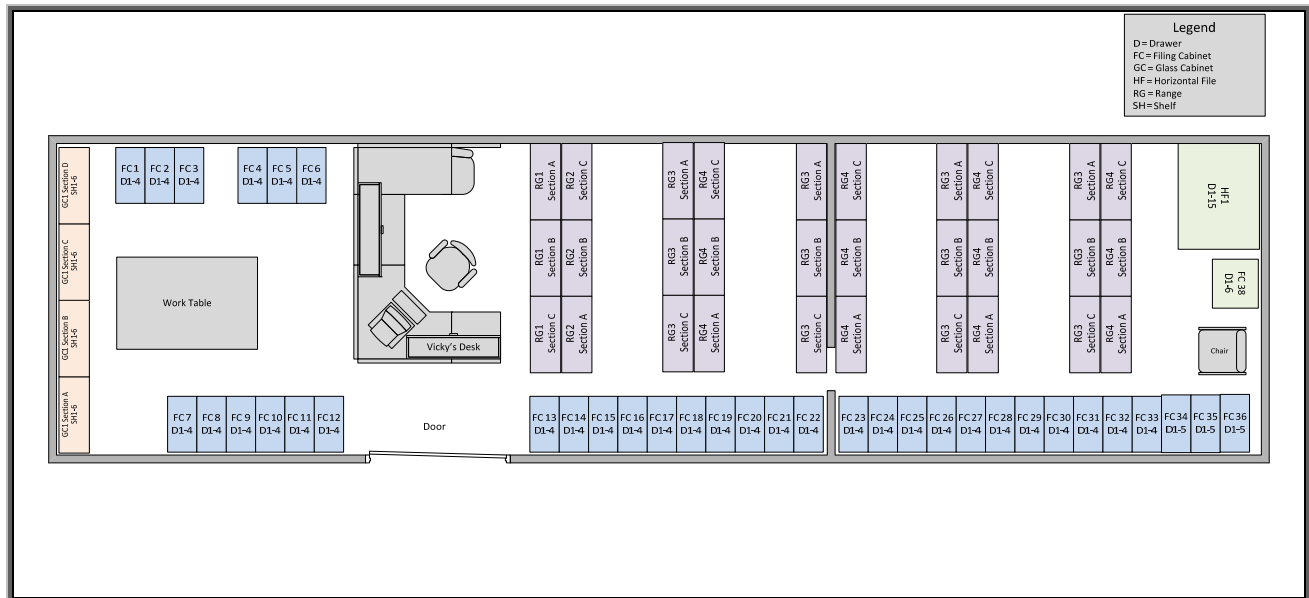
Location Abbreviations			
Code	Level No.	Level	Meaning
MSMULA	0	Repository	Mount Saint Mary's University Los Angeles
VIR	0	Repository	Virtual
CHA	1	Site	Chalon Campus
DOH	1	Site	Doheny Campus
DAM	1	Site	Digital Asset Management Software path (Merlin)
B	2	Building	Building
RM	3	Room	Room
AC	4	Cabinet	Artifacts Cabinet
FC	4	Cabinet	Filing Cabinet
GC	4	Cabinet	Glass Cabinet
HF	4	Cabinet	Horizontal Filing Cabinet
HS	4	Shelving unit	Horizontal Shelves (for oversized, scrapbooks, etc.)
RG	4	Range	Range
W	4	Wall	Wall on which item is displayed - N, NE, NW, S, SE, SW, E, W
SEC	5	Cabinet Part	Section
D	6	Drawer	Drawer

Location Abbreviations			
Code	Level No.	Level	Meaning
SH	6	Shelf	Shelf

11.2 Archives Room Map

This map shows the location of all shelves and cabinets in the Archives room.

Figure 11-1: MSMU Archives Room Map



11.3 Archives Breakout

The following table lists the breakout of cabinet locations in the Archives (B0009-RM109A). Note that some filing cabinets have 5 drawers, while most have 4. Locations marked “D00” indicate the top of the cabinet. This list can be used to assist when creating new breakout locations.

Site/Bldg	Area/Room	L1	L2	L3
CHA-B0009	RM0109A	FC01-FC033	D00-D04	
CHA-B0009	RM0109A	FC34-FC36	D00-D05	
CHA-B0009	RM0109A	GC01-GC04	SEC A-D	SH01-06
CHA-B0009	RM0109A	RG01-RG10	SEC A-C	SH01-10

Site/Bldg	Area/Room	L1	L2	L3
CHA-B0009	RM0109A	HF01	SH01-15	
CHA-B0009	RM0109A	AC01	SEC A-C	SH01-07

12. Appendix C – Name Authority Abbreviations

The following abbreviations are used in Name Authority records.

Honorifics	
Abbreviation	Description
Abp.	Archbishop
Bp.	Bishop
Br.	Brother
Cardinal	Cardinal
Countess	Countess
Dr.	Doctor
Fr.	Father
Freifrau von	Freifrau von
Mayor	Mayor
Miss	Miss
Mr.	Mister (Master)
Mrs.	Missus (Mistress)
Ms.	Miz
Msgr.	Monsieur
PP.	Papa, Papa Pontificum (father of the popes); OR Pater Patrum (father of fathers); a Latin title for a Roman Catholic Pope
Rev.	Reverend
Rev. Mother	Reverend Mother
Rt. Rev.	Right Reverend
Sr.	Sister

Suffixes	
Abbreviation	Description
CSJ	Sisters of St. Joseph of Carondelet
IHM	Sisters of the Immaculate Heart of Mary
Jr.	Junior
Sr.	Senior
II	The second
III	The third
IV	The fourth
CSC	Congregation of Holy Cross
KGCHS	Knight Grand Cross of the Holy Sepulchre
OP	Order of Preachers (Dominican Order)
OSB	Order of St. Benedict (Benedictine Order)
SP	Sisters of Providence
SJ	Society of Jesus (Jesuit Order)
SSJ	St. Joseph's Society of the Sacred Heart or Josephite Fathers

13. Appendix D: Cross Collection Subject Categories (Facets)

The following table lists Cross Collection subject categories used by MSMU, and their scope of use.

Code	Facet Name	Description
ACAD	Academic affairs	Provost, faculty general (training, etc. - NOT papers or vita), advisory bodies, enrollment, affirmative action, research, grades, graduate work, tutoring, special programs, academic planning, college catalogs.
ADMN	Administration	Institutional materials. Board of Trustees, President, all administrative departments, administration of employees, finance, grants, institutional advancement, admissions, public relations, insurance, legal affairs, etc.
ALUM	Alumnae	Materials authored by MSMU alumnae.
AUDV	Audio/visual materials	Audio and visual materials that are not photographs. Only if not already included in a collection. Digital AV materials will be in DAM (Merlin).
CHAH	Chalon History	Collections covering history of Chalon campus
CLIP	Clippings	Clippings from magazines and newspapers. Only use for stand-alone clippings. Do not pull clippings from collections if incorporated. (Note these are product of a clipping service/agency.)
CULT	Culture and spirituality	All cultural groups, spiritual groups, service groups. Includes cultural organizations/clubs, ministries, cultural awareness, catholicity materials, fine arts gallery.
DEPT	Departments / Programs (academic or curricular)	All academic departments. All for Chalon campus. For Doheny campus post 1990. Both current and discontinued. And academic/curricular programs, including ones that are interdepartmental such as American Studies.
CHES	Chester Place History	Collections covering history of Doheny campus or Chester Place.
DOHC	Doheny Campus	All Doheny campus institutional materials before 1990. These materials were organized by previous archivists, and represent an intellectual division of importance in campuses. Do not comeingle with Chalon institutional materials pre-1990.
EPHM	Ephemera	Bookmarks, greeting cards, postcards, posters, souvenirs. Any of these items not already included within collections.

Code	Facet Name	Description
EVNT	Events	All academic and non-academic events. Includes one-time and recurring meetings, holidays, celebrations, anniversaries, auctions, campus tours, disasters, convocations, commencements, commemorations, competitions, conferences, elections, cultural events such as fairs, performances and exhibitions, dances, fund-raising events, special lectures and webinars, festivals, meetings, open houses, parties, political events, receptions, reunions, social events, speeches, student orientation and violence.
LIBR	Library and archives	Library and archives papers, budgets, auctions, procedures and handbooks, library committee, deeds of gift, donations, returned materials lists, early college scrapbooks assembled by librarians, etc.
MATW	Material works	Collectables or material works of art including paintings, sculpture, figurines, plaques, hangings, woven or knitted items, icons, of cloth, glass, ceramics, wood, metal, plastic, etc. NOT paper items except if artwork. No digital artworks.
MUSC	Musical works	Musical scores or notes. Only for items not already included in existing collections.
PAPR	Papers and writings	Individually authored collections, personal papers rather than institutional materials. Faculty papers and vita, deceased staff papers and vita. Include sister's papers, projects and theses. Materials for CSJ as institution in SPON.
PHOT	Photos	Photographs (analog). Note that digital photographs will be kept in separate digital asset management (DAM) system - MerlinOne. Analog photos do not currently contain Doheny Campus photos - those are interfiled with Doheny Campus materials. Only photos not included in other collections.
PROG	Programs (non- or co-curricular)	Non- or co-curricular programs such as Career Planning, Women's Leadership, Fitness Education, etc.
PUBS	Publications	Newspapers, magazines and journals. Only if not included in other collections.
RSRC	Resources and infrastructure	Facilities, groundskeeping, building renovations, bookstore, food service, copying, business office, communications, computer service, safety, security, environment & sustainability, transportation, campus maps, child development center.
SCRP	Scrapbooks	Scrapbooks not part of another collection.
SPON	Sponsors (CSJs)	Materials concerning the Sisters of St. Joseph of Carondelet as an organization. (Note that individual sisters' papers are stored under "PAPR".)

Code	Facet Name	Description
SPTS	Sports	Club sports, Inter-collegiate sports, inter-mural sports, Fitness Education programs.
STDT	Student life	Campus activities, student behavior, tuition, awards, scholarships, student loans, financial aid, student unrest, fraternal societies, service societies, honor societies, experiential learning, ambassadors, ASB.