

Entering Finding Aid Data in ArchivesSpace

INSTRUCTIONS

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INSTRUCTIONS FOR ENTERING FINDING AID DATA IN ArchivesSpace RESOURCE RECORDS

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ArchivesSpace is the collection management and archival description tool in use at USC Libraries. To create a full and complete finding aid in ArchivesSpace, archival processors are required to adhere to a set of requirements for entering data. These requirements are drawn from best practices guidelines published by the Online Archive of California (http://www.cdlib.org/services/dsc/tools/ead_toolkit.html), DACS content standards (<http://files.archivists.org/pubs/DACS2E-2013.pdf>), and EAD structure standards (<http://www.loc.gov/ead/>). For additional technical instructions, please refer to the ArchivesSpace manual (copies available upon request), specifically Chapter 5, Resource Records.

BASIC RESOURCE RECORDS

- 1) Title*
- 2) Identifier*
- 3) Level of Description*
- 4) Date expression and/or Begin Date and End Date
- 5) Extent portion, number and type*
- 6) Language
- 7) Minimum of 3 names/subjects/genres—can be a combination of any of these types, but must total 3
- 8) Abstract note
- 9) Conditions Governing Access note
- 10) Conditions Governing Use note
- 11) Preferred Citation note
- 12) Immediate Source of Acquisition note

Elements with an * are ASpace required fields, meaning the resource record cannot be saved without them. Resource records are spawned from accession records, and numbers 1, 2, 3, 9, 10, 11, and 12 will already be in the resource record (either from the accession record, or added at the time the resource record is spawned). If you begin work on a collection that does not already have a resource record in Archivists' Toolkit, please contact the Archival and Metadata Librarian.

FULL AND COMPLETE FINDING AIDS

- 1) Title*

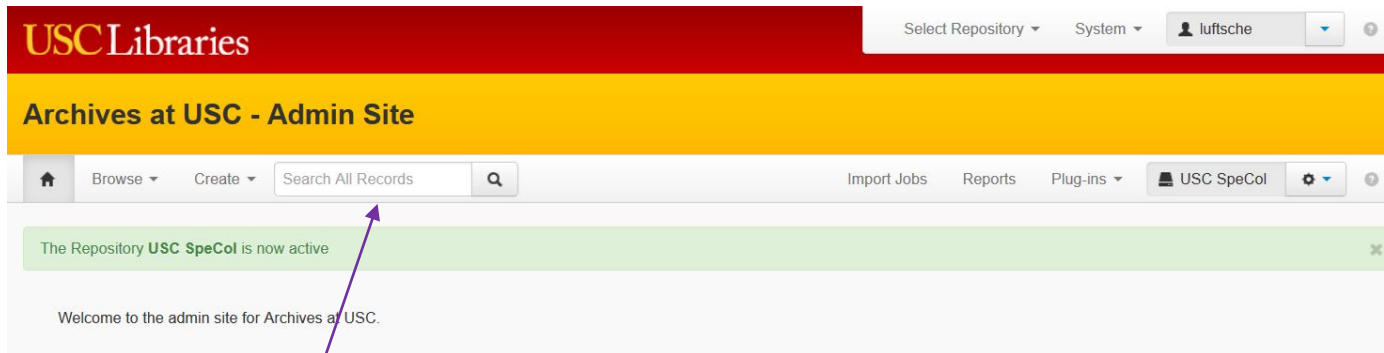
- 2) Identifier*
- 3) Level of Description*
- 4) Date expression and/or Begin Date and End Date
- 5) Extent portion, number and type*
- 6) Language
- 7) Minimum of 3 names/subjects/genres—can be a combination of any of these types, but must total 3
- 8) Abstract note
- 9) Conditions Governing Access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

It is highly recommended that the finding aid also include:

- 15) Arrangement note

First Steps

Sign into ArchivesSpace at <https://archivespace.usc.edu>, click on the **Select Repository** dropdown and make sure the repository in which you need to work is active.



Locate the resource record using the **Search All Records** box. ASpace performs a keyword search, so you may have a long list of results.

Click on **Resource** to narrow your search.

Home / Search for "Ruth Weisberg papers"

Filtered By
 • Text: Ruth Weisberg papers ✕

Ruth Weisberg papers

Record Type

- Archival Object 1307
- Resource 333
- Accession 119
- Event 76
- Collection Management 62
- Digital Object 16
- Person 11

Creator

- Edward H Fickett, FAIA (Firm) 3
- Los Angeles Unified School District 3

Search Results

Showing 1 - 30 of 1924 Results

Sort by: Relevance

Record Type	Title	Created by	Last Modified by	View	Edit
Resource	Ruth Weisberg Papers	admin	admin	View	Edit
Accession	Ruth Weisberg papers	luftsche	luftsche	View	Edit
Resource	Edward H. Fickett, FAIA, records	admin	begdataentry	View	Edit

Once you have located the correct Resource, click on **Edit** to open it.

Search Results

Showing 1 - 30 of 1924 Results

Sort by: Relevance

Record Type	Title	Created by	Last Modified by	View	Edit
Resource	Ruth Weisberg Papers	admin	admin	View	Edit
Accession	Ruth Weisberg papers	luftsche	luftsche	View	Edit
Resource	Edward H. Fickett, FAIA, records	admin	begdataentry	View	Edit

You will be presented with the resource record:

The two sections that you will be working with are

1) The collection inventory

2) The navigation menu

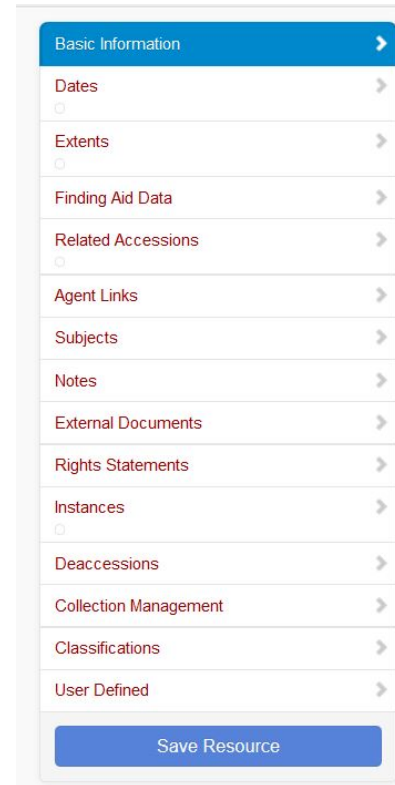
The screenshot shows the 'Ruth Weisberg Papers' resource record. The left-hand navigation menu is expanded to show 'Basic Information'. The main content area displays the 'Basic Information' form with the following fields: Title (Ruth Weisberg Papers), Identifier (0380), Level of Description (Collection), Resource Type, Language (English), Publish? (checkbox), and Restrictions? (checkbox). A purple arrow points from the text 'The two sections that you will be working with are' to the 'Basic Information' menu item. Another purple arrow points from the text '2) The navigation menu' to the left-hand navigation menu.

Navigating the Resource Record screen

The collection inventory lives at the top of the screen:

The screenshot shows the top of the 'Ruth Weisberg Papers' resource record. The navigation menu is visible at the top, and the collection inventory is displayed below it. The collection inventory shows 'Ruth Weisberg Papers' with 'Collection' and 'Text' tabs, and 'Box: 1-45'.

All sections of the finding aid can be accessed from the left hand navigation menu.

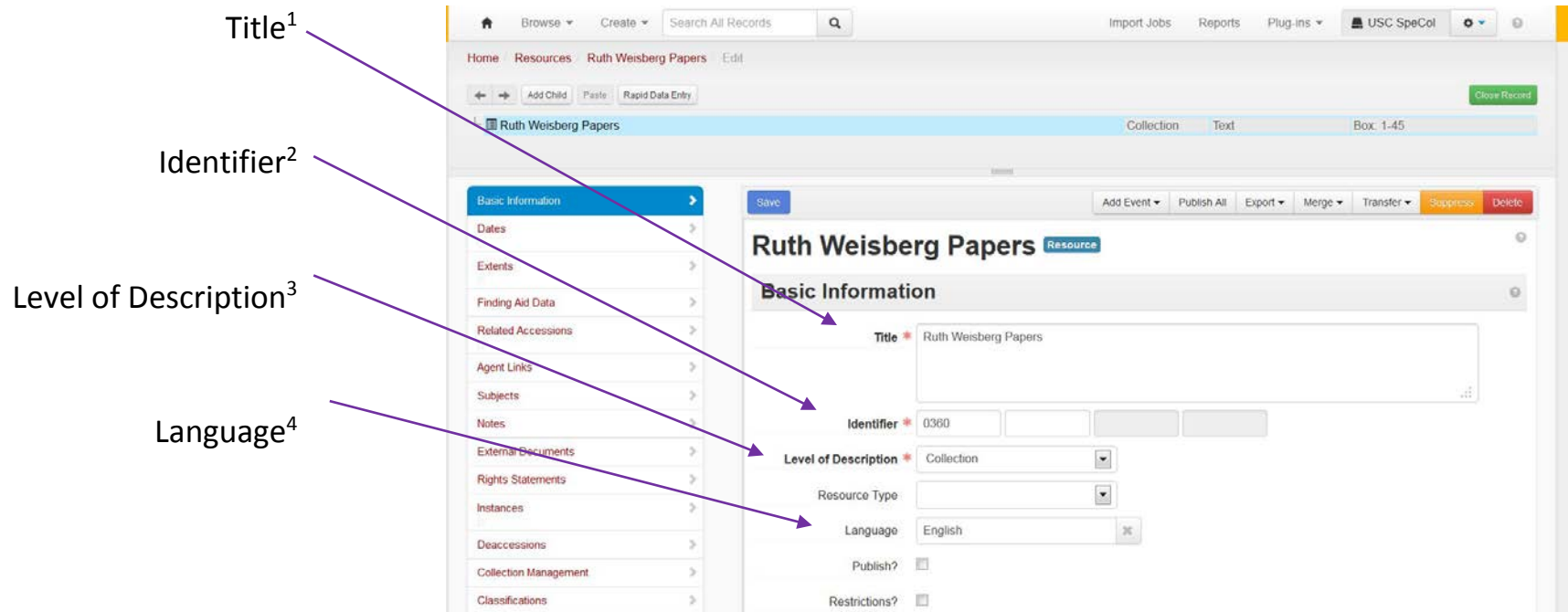


The image shows a vertical navigation menu with a blue header bar labeled "Basic Information" and a right-pointing arrow. Below the header are several menu items, each with a right-pointing arrow and a small square icon to its left. The items are: "Dates", "Extents", "Finding Aid Data", "Related Accessions", "Agent Links", "Subjects", "Notes", "External Documents", "Rights Statements", "Instances", "Deaccessions", "Collection Management", "Classifications", and "User Defined". At the bottom of the menu is a blue button labeled "Save Resource".

Entering Resource Record Information

Opening a resource record automatically places you within the Basic Information screen. Title, Identifier, and Level of Description should already be filled in. Please double check this information.

BASIC INFORMATION



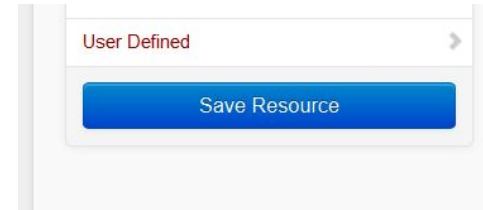
¹Make sure the title of the collection conforms to the standards mandated by DACS (Describing Archives: A Content Standard): **DACS 2.3 Title Element**. *Do not include phrases like “Inventory of...”, “Papers of...”, “Finding aid for...” as at this stage you are not describing the finding aid, you are describing the collection.*

²The Identifier is the collection number. **Please refer to your repository’s conventions for establishing collection numbers.**

³Make sure the Level of Description is set to “collection”. ASpace will also prompt you for a Resource Type: records or papers are the logical choices. This is a suggested element, not a required one.

⁴Language is not a required element, but ArchivesSpace will prompt you to select a language code when you save the record. It is generally (for cataloging purposes) a good idea to include this information. This option is for the primary language of the materials being described.

When you have filled in the Basic Information tab, click on the **Save Resource** button at the bottom of the left hand navigation menu.



COLLECTION INVENTORY

Creating the inventory is done via the **Add Child/Add Sibling** buttons in the collection inventory section.



When you click on Add Child (or Add Sibling, once you have created an archival object), you will be presented with the Archival Object template:

A screenshot of the 'Archival Object' form. The form has a 'Save' button at the top left. The title 'Archival Object' is followed by a link 'Archival Object'. Below this is a section titled 'Basic Information'. The form contains several fields: 'Title' with a required asterisk and a text input area; 'Ref ID' with a note '-- auto-generated upon save --'; 'Component Unique Identifier' with a text input field; 'Level of Description' with a dropdown menu and a required asterisk; 'Language' with a dropdown menu; 'Publish?' with a checkbox; 'Restrictions Apply?' with a checkbox; and 'Repository Processing Note' with a large text input area.

This template should be used for all levels of description—series, subseries, files, items, etc.

Folder or item level description should also have an associated Instance. See the Instance section.

DATES

Next, click on the **Dates** section

Click on the **Add Date** button

The screenshot displays the ASpace finding aid data entry interface. On the left is a vertical navigation menu with the following items: Basic Information, Dates (highlighted in blue), Extents, Finding Aid Data, Related Accessions, Agent Links, Subjects, Notes, External Documents, Rights Statements, Instances, Deaccessions, Collection Management, Classifications, and User Defined. At the bottom of this menu is a blue 'Save Resource' button. The main content area is titled 'Dates' and contains an 'Add Date' button in the top right corner, which is circled in purple. Below the 'Dates' header is the 'Extents' section, which includes an 'Add Extent' button and a form with the following fields: 'Portion' (a dropdown menu set to 'Whole'), 'Number' (a text input field), and 'Type' (a dropdown menu). Below these fields are three sections: 'Container Summary', 'Physical Details', and 'Dimensions', each with a large text input area and a small icon in the bottom right corner.

You will see this screen:

The screenshot shows a web interface for entering date information. On the left is a sidebar menu with categories like 'Basic Information', 'Dates', 'Extents', etc. The 'Dates' section is active. The main area is titled 'Dates' and contains a form. The 'Label' dropdown is set to 'Creation'. The 'Expression' field is empty. The 'Type' dropdown is set to 'Single or Inclusive Dates'. Below this are three more dropdowns: 'Certainty', 'Era', and 'Calendar'. Arrows from the text below point to the 'Label' and 'Type' fields.

Label should be **Creation**

Type should be **Single or Inclusive Dates** only.

Note: Selecting **Inclusive Dates** will bring up this set of drop downs:

This is a close-up of the 'Inclusive Dates' form. The 'Type' dropdown is set to 'Inclusive Dates'. Below it are two date fields: 'Begin' and 'End'. Each has a calendar icon and an example: 'e.g. YYYY, YYYY-MM, or YYYY-MM-DD'. Below these are three more dropdowns: 'Certainty', 'Era', and 'Calendar'.

You may enter dates in the Begin and End fields, or you may use the Expression field as above.

Use Inclusive Dates if you know the exact dates (e.g., 1920-1980). If you are not sure about the dates, use the Date Expression field (e.g., 1920s-1980s or circa 1950s). Phrases like “circa” or “before” should be

lower case. Please refer to **DACS 2.4: Date Element** for guidance on entering dates.

Specific dates should be entered according to ISO standards—year month day, e.g., 1870 November 15

Note: DO NOT USE Bulk Dates, as this option causes export issues. DO NOT USE Range, as this is an application bug that codes dates as Bulk. If you want to record Bulk Dates, use the Date Expression field for all date metadata.

EXTENTS

Click on **Extents** from the left hand menu.

Extent information should be entered as linear feet, e.g.,

Number: 10

Type: Linear feet

Make sure there is some sort of extent information, expressed in linear feet. Linear footage can be expressed to the 100th percent (e.g., 42.25 linear feet). If you are unsure, estimate.

The screenshot shows a software interface for entering extent information. On the left is a vertical menu with the following items: Basic Information, Dates, Extents (highlighted in blue), Finding Aid Data, Related Accessions, Agent Links, Subjects, Notes, External Documents, Rights Statements, Instances, Deaccessions, Collection Management, Classifications, and User Defined. The main area is titled '* Extents' and contains an 'Add Extent' button in the top right. Below the title are three input fields: 'Portion' with a dropdown menu set to 'Whole', 'Number' with an empty text box, and 'Type' with an empty dropdown menu. Below these fields are three sections: 'Container Summary', 'Physical Details', and 'Dimensions'. Each section has a large text input area and a three-dot menu icon in the bottom right corner. Two purple arrows point from the text instructions to the 'Extents' menu item and the 'Container Summary' text area.

Filling in the container summary is not necessary at this stage, but you will need to fill in this information when processing is complete.

FINDING AID DATA

The Finding Aid Date section is long, consisting of a number of fields that must be filled in before the finding aid can be published. Required sections are:

The image shows a web interface for entering finding aid data. On the left is a vertical sidebar with a menu of options: Basic Information, Dates, Extents, Finding Aid Data (highlighted in blue), Related Accessions, Agent Links, Subjects, Notes, External Documents, Rights Statements, Instances, Deaccessions, Collection Management, Classifications, and User Defined. At the bottom of the sidebar is a blue button labeled "Save Record".

The main area is titled "Finding Aid Data" and contains several input fields:

- EAD ID: text input
- EAD Location: text input
- Finding Aid Title: large text area
- Finding Aid Filing Title: large text area
- Finding Aid Date: text input
- Finding Aid Author: large text area
- Description Rules: dropdown menu
- Language of Description: text input
- Sponsor: large text area
- Edition Statement: large text area

Five purple arrows point from text labels on the left to specific fields in the main area:

- "Finding Aid Title¹" points to the Finding Aid Title field.
- "Finding Aid Filing Title²" points to the Finding Aid Filing Title field.
- "Finding Aid Date³" points to the Finding Aid Date field.
- "Finding Aid Author⁴" points to the Finding Aid Author field.
- "Description Rules⁵" points to the Description Rules dropdown menu.

(cont'd on next page)

Series Statement	<input type="text"/>
Revision Date	<input type="text"/>
Revision Description	<input type="text"/>
Finding Aid Status	do_not_publish <input type="button" value="v"/>
Finding Aid Note	<input type="text"/>

Finding Aid Status⁶ →

¹The Finding Aid Title is the same as the Title from the Basic Information section, e.g. Ruth Weisberg papers.

²The Finding Aid Filing Title is formulated according to OAC best practices, e.g. Weisberg (Ruth) papers.

³The Finding Aid Date is the date the finding aid is completed, e.g. 2014 September (formulate dates according to DACS 2.4).

⁴The Finding Aid Author is/are the name(s) of the individuals who are primarily responsible for processing the collection and contributing to the production of the finding aid. You can use a processing note to acknowledge other contributions and contributors.

⁵Description Rules should always be set to **Describing Archives: A Content Standard**.

⁶Finding Aid Status is for USC-internal use only, and is our indicator of what stage of completion the finding aid is in. It is the “signal” for either unchecking all “Publish” checkboxes, or selecting “Publish All” from the Basic Information screen. See Appendix 3 for more information.

AGENT LINKS AND SUBJECTS

OAC best practices (and USC best practices) require a minimum of 3 agent links (i.e., names) and subjects (this can also include genre terms). 3 is the minimum, and can be a combination of any of these types.

To add Agent Links and/or Subjects, click on the **Add...** buttons.

The screenshot shows the ASpace interface with a sidebar on the left containing a menu of options: Basic Information, Dates, Extents, Finding Aid Data, Related Accessions, Agent Links (highlighted), Subjects, Notes, External Documents, Rights Statements, Instances, Deaccessions, Collection Management, Classifications, and User Defined. A blue 'Save Resource' button is at the bottom of the sidebar. The main content area is divided into several sections: Agent Links (with an 'Add Agent Link' button circled in purple), Subjects (with an 'Add Subject' button circled in purple), Notes (with an 'Add Note' button), External Documents (with an 'Add External Document' button), Rights Statements (with an 'Add Rights Statement' button), and Instances (with 'Add Instance' and 'Add Digital Object' buttons). Below the Instances section, there is a list item '___ : Box 1-45' with 'Expand' and 'X' buttons. A purple arrow points from the text on the left to the 'Add Agent Link' button.

Clicking on Add Agent brings up the following options:

The 'Agent Links' form is shown with the following fields: Role (dropdown menu), Relator (dropdown menu), and Agents (text input with a search prompt 'Type to search available records...'). There is an 'Add Agent Link' button in the top right corner and an 'X' button in the top right corner of the form.

You must select a Role and enter the Agent name.

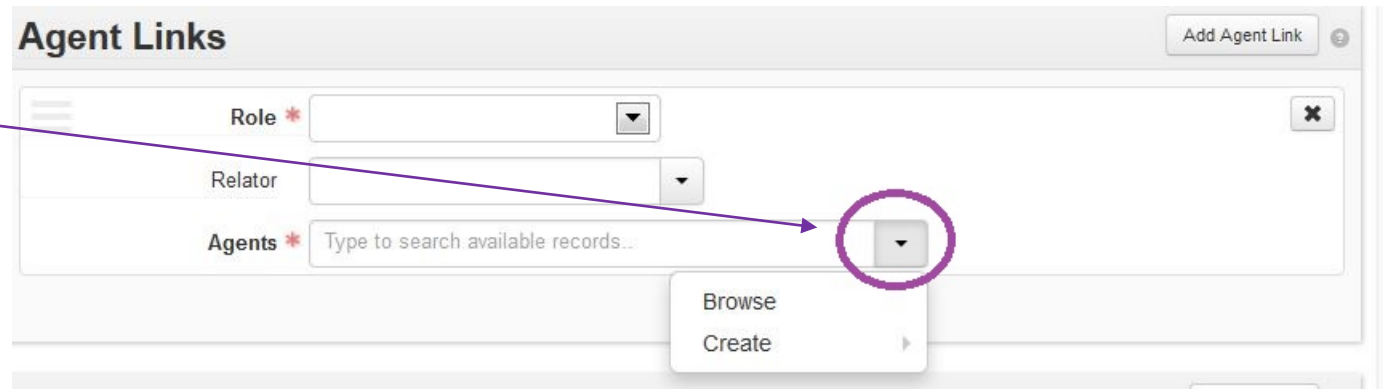
Role:

Will be one of three options—Creator, Source, or Subject. **The Creator of a collection must be added as both Creator and as Subject. Adding an agent as a subject will also bring up options to add Terms and Subdivisions. USC best practice requires the addition of a form subdivision for the Subject added entry of the creator. Add “Archives” as the Genre/Form term.**

Typing in the Agents field will automatically signal ASpace to search existing name records (records that we have already added to our database). You may also click on the down arrow next to the field to browse the existing Agent names.

If the name you need is not already in our database, you must create it.

Click on the down arrow next to the Agents field to bring up the **Browse** and **Create** menus.



The screenshot shows the 'Agent Links' form with three fields: 'Role *', 'Relator', and 'Agents *'. The 'Agents *' field contains the placeholder text 'Type to search available records...'. A purple circle highlights the dropdown arrow on the right side of the 'Agents *' field. A purple arrow points from the text 'Click on the down arrow next to the Agents field to bring up the Browse and Create menus.' to this dropdown arrow. A dropdown menu is open below the 'Agents *' field, showing two options: 'Browse' and 'Create'.

Mousing onto the **Create** option brings up a sub-menu from which you must choose what kind of Agent name to create: Person, Corporate Entity, Family, or Software (ignore Software). Once you make your selection a new window opens in which you can input the required information (see Appendix 1 for creating agent links).

Adding Subjects is a similar process—typing in the field to search across existing subject headings, using the drop down arrow to **Browse** or **Create** existing/new subject access points. (See Appendix 2 for creating new subject access points.)

NOTES

OAC and USC best practices require the inclusion of 6 notes:

Abstract note

Conditions Governing Access note

Conditions Governing Use note

Preferred Citation note

Immediate Source of Acquisition note

Scope and Contents note

It is highly recommended that the finding aid also include:

Biographical or Historical note

Arrangement note

The required notes should already be present in the resource record (spawned from the accession record) but if they need to be added, follow these instructions:

Click on the **Add Note** button

The screenshot shows the ASpace interface with a left sidebar containing various menu items: Basic Information, Dates, Extents, Finding Aid Data, Related Accessions, Agent Links, Subjects, Notes (highlighted in blue), External Documents, Rights Statements, Instances, Deaccessions, Collection Management, Classifications, and User Defined. At the bottom of the sidebar is a 'Save Resource' button. The main content area displays several sections: Notes (with an 'Add Note' button circled in purple), External Documents (with an 'Add External Document' button), Rights Statements (with an 'Add Rights Statement' button), Instances (with 'Add Instance' and 'Add Digital Object' buttons, and an 'Expand' button next to a list item), Deaccessions (with an 'Add Deaccession' button), Collection Management (with an 'Add Collection Management Fields' button), and Classifications (with an 'Add Classification' button).

This will bring up the Note Type drop down; select the appropriate note.

The screenshot shows the 'Notes' form with a 'Note Type' dropdown menu. The dropdown is open, showing a list of options. Below the dropdown is a message that says 'Please select a Note Type'. There is a plus sign at the bottom of the form.

Selecting a Note Type will bring up the subsections—Multipart Note and Text.

The Type refers to the EAD encoding and should not be changed. It will also automatically populate (in the finding aid) the note Label, so do not make any changes, with one exception—Biographical/Historical note. In the case of a Biographical (persons) or Historical (corporate bodies) note, the appropriate label (Biographical Note or Historical Note) must be added.

The screenshot shows the 'Notes' form in ArchivesSpace. At the top, there is a 'Notes' header with an 'Add Note' button. Below this is a 'Note Type' dropdown menu set to 'Scope and Contents'. The main section is 'Multipart Note', which includes fields for 'Persistent ID', 'Label', and 'Type' (set to 'Scope and Contents'). There is also a 'Publish?' checkbox. Below this is a 'Sub Notes' section with an 'Add Sub Note' button. The 'Text' subsection is expanded, showing a 'Content' text area with a 'Publish?' checkbox. A note at the bottom of the content area says 'Mixed Content Enabled -- Type '<' for elements or highlight text to wrap'.

Text is entered in the Content box.

USC has standardized text for three required notes: Conditions Governing Access, Conditions Governing Use, and Preferred Citation. See Appendix 3 for the text for these notes. ArchivesSpace does not allow for the prepopulating of these notes but there are techniques you can use to autofill the text. Please consult with the Archival and Metadata Librarian for instructions.

INSTANCES

Instances refers to the physical (or digital) instantiation of materials. Instances can be recorded at any level of description, but should generally be recorded at the lowest level.

Your basic resource record may have instances already present, spawned from the accession record. These will probably be associated with the highest component, and thus will need to be changed/deleted. Once you have entered component information, you will need to add an instance associated with that component. To do so,

Click on the **Add Instance** button

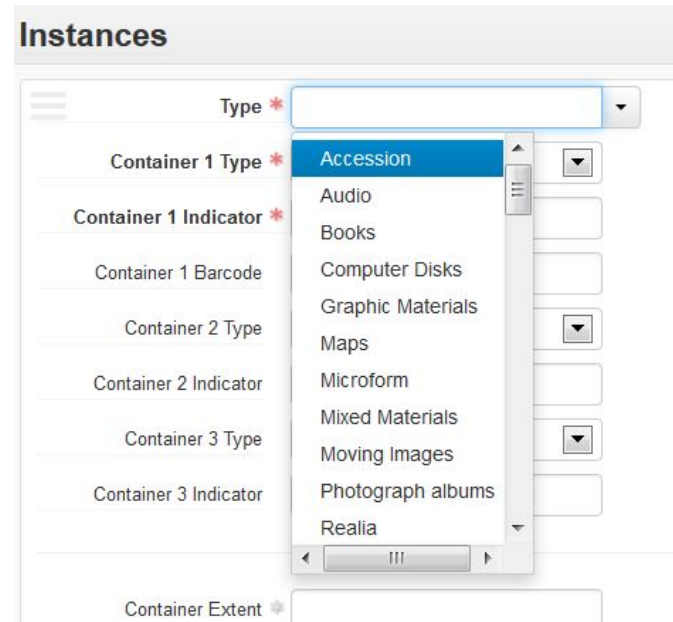
This will bring up some dropdown menus: **Type**, **Container 1 Type**, and **Container 1 Indicator**.

The screenshot shows a web interface for managing instances. On the left, a sidebar contains a menu with 'Instances' selected, and a 'Save Resource' button. The main area is titled 'Instances' and features a purple arrow pointing to a circled 'Add Instance' button. Below this, there are several form fields: 'Type *' (dropdown), 'Container 1 Type *' (dropdown), 'Container 1 Indicator *' (text), 'Container 1 Barcode' (text), 'Container 2 Type' (dropdown), 'Container 2 Indicator' (text), 'Container 3 Type' (dropdown), 'Container 3 Indicator' (text), 'Container Extent *' (text), and 'Container Extent Type *' (dropdown). At the bottom, there is a 'Locations' section with an 'Add Location' button. A 'Collapse' button is also visible in the top right corner of the form area.

Type refers to the format/genre of the materials being described. In general, materials tend to be mixed, so we use “Textual Materials” as our default.

Container 1 Type should be chosen from the available entries in the drop down list; it will most likely be “Box”; Container 1 Indicator refers to the number of this container, ie, the box number.

For folder level description, add Container 2 Type and Indicator.



The screenshot shows a web form titled "Instances". The form has several fields, each with a red asterisk indicating it is required. The fields are: "Type", "Container 1 Type", "Container 1 Indicator", "Container 1 Barcode", "Container 2 Type", "Container 2 Indicator", "Container 3 Type", "Container 3 Indicator", and "Container Extent". A dropdown menu is open for the "Type" field, showing a list of material types: "Accession", "Audio", "Books", "Computer Disks", "Graphic Materials", "Maps", "Microform", "Mixed Materials", "Moving Images", "Photograph albums", and "Realia". The "Accession" option is currently selected and highlighted in blue. To the right of the dropdown menu, there are several small square buttons, some of which are also highlighted in blue.

The Instance for each Archival Object should also have location information attached. Click on the **Add Location** button to associate a location with the instance.

The screenshot shows a web form titled "Locations". At the top right is a button labeled "Add Location". The form contains several fields: "Status" with a dropdown menu showing "Current"; "Start Date" and "End Date" with calendar icons; a "Note" text area; and "Location" with a dropdown menu containing the placeholder text "Type to search available records..". A purple arrow points from the text on the left to the "Add Location" button.

Typing in the **Location** field will bring up a matching list of locations; alternatively, you can click on the dropdown arrow to browse existing locations.

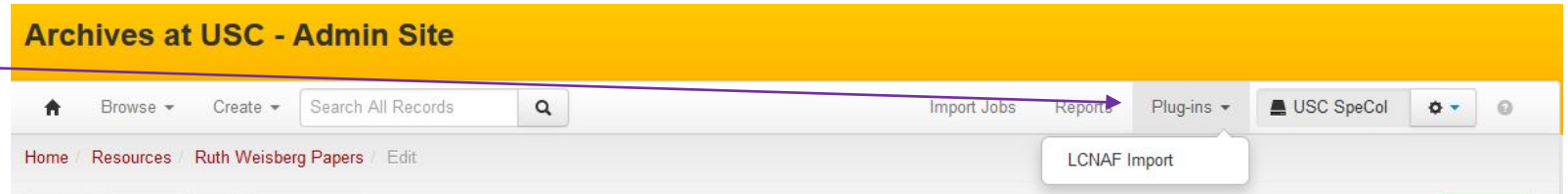
Appendix 1: Creating Agent links

It is very likely that an agent you wish to associate with your finding does not currently exist in our database, so you will need to add the name. Metadata for names is entered through the Agents section of the resource record.

There are two ways to enter name metadata in ArchivesSpace. The first allows you to import a name authority record from the Library of Congress Name Authority database, if that name has already been established.

IMPORTING ESTABLISHED NAMES

From the top of your screen, click on **Plug-ins**, then **LCNAF Import**



Enter the last name in the Primary Name field. Rest of Name is not required but will help to narrow your search. Click the "Search" button.

LCNAF Import

Primary Name *

Rest of Name

Search

If your name exists in the database, you will be presented with the results.

Scroll through each record to determine which one you would like to import, then click on the "Select" button next to that name.

LCNAF Import

Primary Name *

Rest of Name

[Search](#)

Page 1 - Showing results 1 to 2 of 2 matches

Select	<pre><record> <leader>00000cz a220000n 45 0</leader> <controlfield tag="001">oca01756099 </controlfield> <controlfield tag="005">20010801033231.0</controlfield> <controlfield tag="008">861204n acannaab n aaa </controlfield> <datafield ind1=" " ind2=" " tag="010"> <subfield code="a">n 85274816</subfield> </datafield> <datafield ind1=" " ind2=" " tag="040"></pre>
Select	<pre><record xmlns:mx="http://www.loc.gov/MARC21/slim"> <leader>00000nz a220000n 45 0</leader> <controlfield tag="001">oca09589017 </controlfield> <controlfield tag="005">20131012073558.0</controlfield> <controlfield tag="008">131011n azannaabn a aaa </controlfield> <datafield ind1=" " ind2=" " tag="010"> <subfield code="a">no2013112351</subfield> </datafield> <datafield ind1=" " ind2=" " tag="040"></pre>

Your choice will be “Selected” and the authority record control number will appear on the right hand side of the screen. Click on the “Import” button.

LCNAF Import

Primary Name *

Rest of Name

n85274816

Page 1 - Showing results 1 to 2 of 2 matches

Selected

```
<subfield code="c">0000</subfield>
<subfield code="d">NNWhit</subfield>
</datafield>
<datafield ind1="1" ind2=" " tag="100">
  <subfield code="a">Weisberg, Ruth</subfield>
</datafield>
<datafield ind1=" " ind2=" " tag="670">
  <subfield code="a">Her Ruth Weisberg, c1986:</subfield>
  <subfield code="b">p. 45 (prof., fine arts, Univ. of Southern Calif.; B.A. and M.A., Univ.
of Mich.)</subfield>
```

ASpace will run through the import process, and you will be redirected to a screen indicating your import job has been complete.

You may now locate the record you imported, which you can do via the Browse → Agents menu, or by searching the database from the main search box.

To add the newly imported name to your finding aid, refer to the Agent Links and Subjects section above.

ADDING NEW NAMES

If no matching name is found in the LCNAF database, you must create the Agent in our ASpace database.

When the name you need to enter is not found in the Authority File (i.e., it has not yet been established), you must “create” (establish) the name. Choose the most common form of name found in the collection. Do research to confirm the name, and if possible, to find dates (for persons).

Acceptable sources of information:

- 1) Material in the collection itself—letters, clippings, etc.
- 2) Use a search engine, like Google, to see what you can find.
- 3) Check the (Historical) Los Angeles Times for an obituary (if a local person) or other information (for a corporate body or family).
- 4) Check other newspapers (available through the electronic resources search in Homer).

Document your sources. Record the source in a note (You can add a Biographical/Historical note to the Agent record via the Notes section). Alternatively, you can print out any information you find and/or save it electronically and give/send it to the Archival and Metadata Librarian. Make sure that the “Publish” checkbox for this note is unchecked.

You may find variant forms of the name. This is especially common with government bodies; these entities invariably go through name changes over the course of their administrative history. You need to make sure you use the latest form of the name in use at the time the material in your collection was created, but note earlier and later names, if possible. This information will be used in the authority record(s). Record any variant forms by clicking on the “Add Name Form” button; this will bring up a second (and third, etc) Name Form template. If possible, record sources for variant forms in a note, or print out what you have found.

This information is required if we submit the name to NACO.

To create a new Agent:

Click on the Agent Links section from the left hand navigation menu, then click “Add Agent Link”.

This brings up the dropdown menus for Role, Relator and Agents

Click on the arrow next to the Agents dropdown and hover your mouse over “Create”. You will be presented with a list of agent types. Select the appropriate one.

The screenshot shows a web interface for creating an Agent Link. At the top, there is a header "Agent Links" and a button "Add Agent Link". Below this, there are three dropdown menus: "Role", "Relator", and "Agents". The "Agents" dropdown is open, showing a list of agent types: "Person", "Family", "Corporate Entity", and "Software". The "Create" option is highlighted in blue. A purple arrow points from the text "Click on the Agent Links section..." to the "Add Agent Link" button. Another purple arrow points from the text "Click on the arrow next to the Agents dropdown..." to the dropdown arrow of the "Agents" field.

A popup window appears in which you will enter the metadata for the name you wish to create. The first form of the name you enter will be recorded as the authorized form; this will be the most common form of name that you have discovered in your research.

Create Agent

For **Source**, select “Local sources”

For **Rules**, select “Resource Description and Access”

Primary Part of Name:

For individuals, this is last name. First name goes into Rest of Name, and if you need to spell out initials, use Fuller Form

You will notice the two highlighted labels at the top of the screen:

Authorized and **Display Name**. The first Agent record you create is automatically identified by ASpace as the “authorized” version and thus will be

Authorized Display Name

Authority ID

Source *

Rules *

Name Order * Indirect

Prefix

Title

Primary Part of Name *

Rest of Name

Suffix

Fuller Form

Number

Qualifier

Create and Link to Agent Cancel

the one displayed in your record. Make sure that the first record you create is the one you want identified as the authorized form.

After you have filled out the information, click on the **Create and Link to Agent** button

For corporate bodies, the **Primary Part of Name** is the most common form. For governmental agencies, you will need to use the Subordinate Name fields.

Ex:

American Association of Social Workers. Los Angeles Chapter

American Association of Social Workers is the primary part of name; Los Angeles Chapter is the Subordinate Name 1.

Name Forms Add Name Form

Authorized Display Name

Authority ID

Source

Rules

Primary Part of Name *

Subordinate Name 1

Subordinate Name 2

Number

Qualifier

Sort Name System generates when saved

Automatically generate

To add additional, alternative/unauthorized names to the same agent record, locate the agent record you just created and click on the Add Name Form button in the Name Forms section. Follow the same procedures as above. You will see that the template has different labels

The screenshot shows a 'Name Forms' dialog box with the following fields and controls:

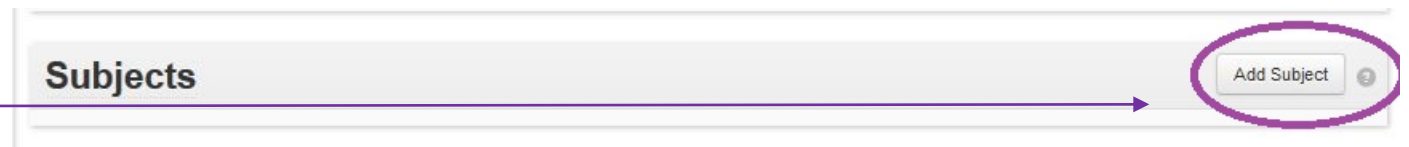
- Buttons: **Make Authoritative Name** and **Make Display Name** (highlighted with a purple oval).
- Authority ID: Text input field.
- Source: Dropdown menu.
- Rules: Dropdown menu.
- Primary Part of Name: Text input field (marked with a red asterisk).
- Subordinate Name 1: Text input field.
- Subordinate Name 2: Text input field.
- Number: Text input field.
- Qualifier: Text input field.
- Sort Name: Text input field containing 'System generates when saved' (marked with a red asterisk).
- Automatically generate: Checked checkbox.

Appendix 2: Creating Subject access points

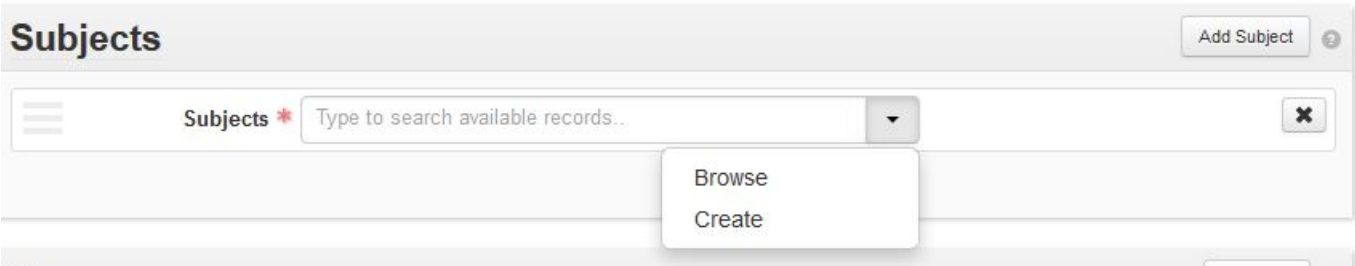
You may need to add new subject access points to your finding aid, if the subject you need does not already exist in the database. As with Agents, Subjects can be created via the Create → menu, or from within the finding aid.

From within the finding aid, click on the Subjects link from the left hand navigation menu. This will bring up the Subjects section of your finding aid:

Click on the **Add Subject** button.



You will be presented with the **Subjects** dropdown. Click on the dropdown arrow to bring up the **Browse** and **Create** options.



Selecting **Create** brings up a popup template where you will enter the new subject metadata

The type of term you enter will determine your selection for **Source**.
Library of Congress Subject Headings are only used for Topical Terms and Geographic Names. Genre/Form terms should be taken only from AAT or TGM.

Enter your term in the **Term** field.

Type will generally be either Genre/Form, Geographic, or Topical Term. In general, we do not use any of the other

The screenshot shows a 'Create Subject' form with the following sections and fields:

- Basic Information**:
 - Authority ID:
 - Source: Library of Congress Subject He
 - Scope Note:
- * Terms and Subdivisions**:
 - Term *:
 - Type *: Cultural context
- External Documents**:
 - Add External Document
- Buttons: and

Annotations include a purple arrow pointing to the 'Source' dropdown, a black arrow pointing from the 'Term' field to the 'Type' dropdown, and two purple arrows pointing to the 'Create and Link to Subject' button.

types of terms.

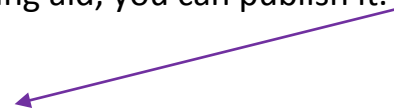
Faceted subject terms must be entered as individual term and subdivision(s). Click on the Add term/Subdivision button to add subdivisions to your term.

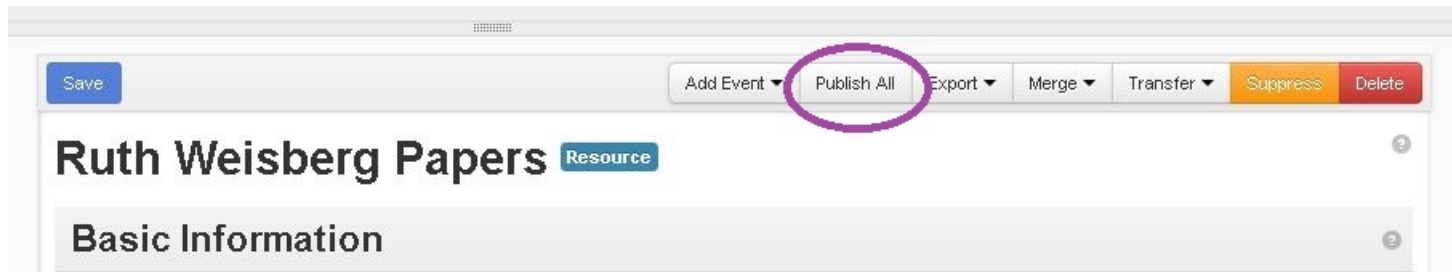
When you have entered all your information, click on the **Create and Link to Subject** button.

Note: If you are not experienced with developing faceted subject headings, please contact the Archival and Metadata Librarian.

Appendix 3: Publishing your finding aid

When you have entered all the information required to complete your finding aid, you can publish it. To do this, simply click on the **Publish All** option at the top of the Basic Information section:





The default options associated with your login can be set to have the Publish checkbox automatically checked or unchecked. Contact the Archival and Metadata Librarian for help with this. The default should be for the checkbox to be checked. It is recommended that you change the default to unchecked. If the default is set to Publish, then your work will be visible to users while it is in progress.