

J. Paul Getty Trust Institutional Archives Accessioning Manual

6th Edition

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Table of Contents

Part 1: Accessioning Practices and Procedures	2
Basic Assumptions and Practices	2
Physical Management	2
Accession Numbers as Box/Call numbers	2
Accession Documentation	3
Systems	3
Hybrid accession files	3
Accessioning Procedures	4
1) Obtaining an authorization for the accession	4
2) Entering data into ArchivesSpace and labeling boxes	4
3) Creating an electronic accession file	4
4) Creating a physical accession file	5
5) Create a box list/inventory as time permits	5
Part 2 – Entering Data into ArchivesSpace	6
Create a New Accession	6
Defaults	7
Basic Information (Required)	7
Dates (Required)	9
Extents (Required)	10
Agent links (Required)	11
Related Resources (As Needed)	12
Related Accessions (As Needed)	13
Subjects (Not Used)	14
External Documents (As Needed)	14
Rights Statement (Not Used)	15
Instances (Required)	16
Deaccessions (As Needed)	19
Collection Management (Required)	21
Classifications (Required)	22
Events (Required)	23
User Defined Fields (As Needed)	26
Reports	27
APPENDIX A: The History of Institutional Archives Accessions	28
General History	28
Past Managers and Staff of Institutional Records	31

Part 1: Accessioning Practices and Procedures

Basic Assumptions and Practices

The Institutional Archives receives institutional records by transfer and institutional manuscript collections by donation or purchase.

- Multiple accessions may be received in a single day. An accession may be organized in accordance with the retention schedule or it may be a box/envelope of random records. It may contain one or multiple series. In each case, some records may not be archival or may not have met retention and will need to be destroyed or retained longer.
- Some archival records will accrue regularly throughout a year, depending on the department, as record material is superseded, closed, etc. or as copies of publications, ephemera, etc. are delivered. Assign a single accession number each year for each accession of this type, whether for the individual publications that trickle in throughout the year or for the program events of a department that arrive regularly throughout the year. At the end of each year verify the accessions' total volumes and date ranges.
- Some archival records will come in randomly, for example as people find things under their desks, while others will arrive in big sets, possibly yearly, as departments apply the retention schedule.
- Institutional manuscript accessions will arrive randomly over the course of the year.
- Assign accession numbers using the format YYYY.IA.consecutive #.
- Alma records will not be created automatically for each accession, but manually on a case-by-case basis.

Physical Management

- **Received materials should be boxes and labeled with an accession number as soon as possible, to prevent any confusion or misidentification.**
- **To ensure the ability to retrieve records, no material should ever go into the stacks without a call number on the box and a call number and location in ArchivesSpace.**
- For retrieval of accessioned material held in off-site storage, work with the Annex Courier daily runs - note that material is collected from each site during the late morning and delivered to the other site mid-afternoon of the same day. Flat files are now the only things that we regularly still need to transport in personal vehicles. For emergency or rushed retrievals (which are uncommon and usually involve Legal but use your best judgement) we will use Getty vehicles or our own personal vehicles (using personal vehicles tends to work more efficiently).
- Archives staff will **not** bring accessioned Getty records to their personal residences. Exceptions may be made in extreme circumstances (a natural disaster occurs during transport) with the awareness of other staff. The concern here is the maintenance of chain of custody.

Accession Numbers as Box/Call numbers

Accession numbers will be included in the box numbers. For box numbers 1-9 we will use a leading zero going forward. Older numbers do not have the leading zeros and will only be corrected as time permits.

Example: [Accession number]-[box number]

2005.IA.01-01

2005.IA.01-02

1986.IA.01-01

1986.IA.01-02

Reasoning: Finding aids may contain multiple accessions, so this system maintains:

- a constant, permanent, and direct relationship between the records and their accession information
- a clear record of which materials came from which accessions within finding aids
- a consistent call number that is NOT dependant on a finding aid identifier, ensuring that, even when finding aids evolve, a researcher can still ask for the same box and expect to find the same records (barring additional rehousing that may be necessary down the road), and
- an ability to facilitate the intellectual integration of new materials to finding aids.

Implications:

- Because of the necessary intellectual organization of records, the box numbers may not be consecutively displayed as one reads down a finding aid page.
- It may, in time, involve pulling a few more boxes than might be the case with physical integration.

Accession Documentation

Systems

- ArchivesSpace is the place of record for electronic accession data and location data.
- Stub records will rarely be entered into TMS, but only for items going on loan or exhibition.
- Electronic accession inventories will continue to appear under the appropriate accession number on ARJ1(//PRD-ARJ) until we can convert them to EAD and import them into ArchivesSpace.
- On very rare occasions brief MARC records for public accessions will be entered into Alma.

Hybrid accession files

Hard Files

The hard copy accession files are located in H413 on GRI L2, in the main bank of file cabinets. Accession files are the primary place of record for hard copy Institutional Archives accession data, though many of the files must be used together with the electronic accession files.

Types of records that should be found in an accession file:

- Hard copy transfer documentation (included relevant e-mail, memos, correspondence, acknowledgements, signed transfer lists, donation forms, deed of gift forms, purchase documentation, etc.)
- Box lists (if not included in above documentation)
- Copy of ASpace Assessment record (to be developed).
- A copy of the accession record from ArchivesSpace

Electronic Files

Electronic information regarding accessions lives on ARJ1(//PRD-ARJ) (some of us have it mapped to the A drive A:\ira_locked). Electronic accession files are the primary system of record for digital documents relating to IA accessions as well as original born-digital archival material.

The electronic accession files contain a folder for each calendar year and the accessions are listed by number under that year. Each of the accession folders contains documentation, inventories, and sometimes the actual content of the collections that were accessioned during that year. Many of the files must be used together with the hard copy accession files.

Related materials may be found at G:\Institutional Archives\COLLECTION MANAGEMENT\CM100_Archives Acquisitions-in-progress

This location contains folders for accessions in progress. After the necessary records or papers have been received, the relevant folder is renamed with the new accession number and moved to the appropriate year on the ARJ1 drive.

Accessioning Procedures

The order of activities listed below for formally accessioning a set of records is ideal, though it will vary in practice. Some of these activities may occur simultaneously.

- 1) Obtain an authorization for the accession (a signed transfer of records form, a clear piece of email correspondence, a deed of gift, etc.).
- 2) Enter information in ArchivesSpace and put a red label with the accession number on the box.
- 3) Create a digital accession file for any electronic documentation or content.
- 4) Create a physical accession file for any hard copy documents
- 5) Create a box list/inventory of the accession contents (if it is not already included with the records) if time permits.

1) Obtaining an authorization for the accession

All external Institutional Archives accessions must be authorized in writing and documented with a proper purchase agreement or deed of gift (specifically, use the GRI's standard deed of gift form). Internal transfers require no specific documentation, though any relevant correspondence or disposition form should be retained and placed in the accession file.

2) Entering data into ArchivesSpace and labeling boxes

(See detailed steps in Part 2 below.)

All accessioned material should immediately be boxed and labeled with the accession number. Use the red labels found in both the Suite and the Processing Room at the Annex. No box should EVER go into the stack without a label and an accession number.

3) Creating an electronic accession file

- 1) Within the appropriate year on ARJ1(//PRD-ARJ) (mapped to the A drive A:\ira_locked), create a new folder using the accession number. The folder name should not include punctuation or capital letters: 2019ia01.
- 2) Within the folder create up to three subsidiary folders as needed: Documentation, Originals, and Access
 - a. Documentation: contains administrative content regarding the accession, pertinent copies of emails, electronic inventories, readme notes to the file, manifests, etc.
 - b. Originals: contains any original electronic archival content
 - c. Access: contains any access copies of the original content, sometimes access copies arrive with the materials, sometimes we generate it.
- 3) Currently, it is understood that both hard copy and electronic accession files exist, so the location of the electronic accession file is not being noted in ArchivesSpace as a standard practice.

4) Creating a physical accession file

- 1) Write the accession number in pencil on the far right corner of an acid-free folder.
- 2) Place a copy of all information relevant to the accession in the file, including printed e-mails, inventories, authorizations, notes or memos, the printed copy of the accession form from ArchivesSpace, etc.
- 3) File the new accession folders in accession number order.
- 4) At the end of each calendar year printed labels are created for the accession files using Avery clear mailing labels (1 x 4 1/8, product number 5661) with the template found at GRI\Institutional Archives\Collection Management\Archives Management\Forms\Accession file labels.doc. The labels should include the accession number, title, and identity of transferor or donor (see examples on the existing accession files). The labels currently live on the supply shelf in the Suite.

5) Create a box list/inventory as time permits

If a new accession doesn't come with a contents list (ideally folder level including dates for each folder), one must be created as soon as possible. Until the accession is processed, these inventories serve as the only point of access for reference purposes. They need to be reasonably detailed and as accurate as possible.

- Enter the box list directly into the ArchivesSpace resource module. If you need to cut and paste, do it from wordpad or notepad – NOT Word! List the folders found in each box, being sure to include dates even if they don't appear on the folder titles. Sections of loose materials should be similarly described and dated. The ASpace record will be the place of record for the box list, though one can print a copy for the accession file.

SAA Museum Archives Section Working Group Example

Part 2 – Entering Data into ArchivesSpace

Note: This manual presupposes a working knowledge of ArchivesSpace. If the reader is unfamiliar with the system, use the system documentation and consult with the Department Head in conjunction with these instructions.

Create a New Accession

Log into ASpace

Go to Browse on the toolbar and select Accession from the dropdown.

Select the current year in the “Filter by Text” box on the left to recall the most recent accessions. You may need to sort the results by identifier to see what accession number was most recently used. You will be using the next number in order.

Select “Create Accession” from the upper right of the accession screen and you will see the following screens. Fill in the information as described below.

Basic Information

Title	<input type="text" value="Historic Cities OWHC project records"/>
Identifier *	<input type="text" value="2014"/> <input type="text" value="IA"/> <input type="text" value="42"/>
Accession Date *	<input type="text" value="2014-12-02"/> <input type="button" value="📅"/> <small>e.g. YYYY-MM-DD</small>
Content Description	<input type="text" value="Records related to the Getty Conservation Institute's collaboration with the Organization of World Heritage Cities (OWHC) to develop programming for the organization's"/>
Condition Description	<input type="text"/>
Disposition	<input type="text"/>
Inventory	<input type="text"/>
Provenance	<input type="text"/>
Retention Rule	<input type="text"/>
General Note	<input type="text" value="Transferred by David Schow in GCI. Possibly files of Tom Roby in Field Projects."/>
Acquisition Type	<input type="text" value="Transfer"/>
Resource Type	<input type="text" value="Records"/>
Restrictions Apply?	<input checked="" type="checkbox"/>
Publish?	<input type="checkbox"/>
Access Restrictions?	<input checked="" type="checkbox"/>
Access Restrictions Note	<input type="text" value="The following types of records are permanently closed: records containing personal"/>
Use Restrictions?	<input checked="" type="checkbox"/>
Use Restrictions Note	<input type="text" value="Contact <extref actuate='onrequest' href='http://hdl.handle.net/10020/repro_perm'"/>

Defaults

Note that the following values have been set as defaults for new accessions. Edit these values as needed.

- **Resource type:** Records
- **Access Restrictions:**
The following types of records are permanently closed: records containing personal information, records that compromise security or operations, legal communications, legal work product, and records related to donors. The J. Paul Getty Trust reserves the right to restrict access to any records held by the Institutional Archives.
- **Use Restrictions:**
Contact http://hdl.handle.net/10020/repro_perm show="new">Library Rights and Reproductions at the Getty Research Institute for copyright information and permission to publish.
- **Use restrictions checkbox:** True
- **Access restrictions checkbox:** True
- **Restrictions apply checkbox:** True

Basic Information (Required)

Working down the screen:

Title: (Required): Enter the title of the accession (this may or may not have any relationship to the eventual finding aid title). Unlike a finding aid, the precision of the title here is not critical so long as it is readily informative.

Identifier (Required): Enter the accession number into the "Identifier" fields as in the example above. ASpace will automatically supply the necessary periods between the fields.

Accession Date (Required): Enter the date in the "Accession Date" field, using the format yyyy-mm-dd. The only reason not to use the current date would be to accession something that came in at the end of the calendar year, while staff were out, for the purpose of tracking it in the correct calendar year.

Content Description (Required): Open text field. Enter an abstract of the accession contents. It should contain record types, dates, creator, and some sense of subject content. Note that it maps to the Scope and Content Note in the resource module when a resource is created from the accession record.

Condition Description (Rarely Used): Open text field. A description of the physical condition of the contents of the accession, including any special handling requirements. When spawning a Resource, this field maps to the main level general physical description note.

Disposition (Rarely Used): Open text field. Use the “Disposition Note” field for information such as “Items should be offered back to the donor before they are destroyed,” etc.

Inventory (Not Used)

Provenance (Rarely Used): Open text field. A note that provides provenance information about an accession, such as custodial history, detailed acquisition information, etc.

Retention Rule (Not Used)

General Note (As Needed): Open text field. Use the “General Note” field for general administrative information about the accession. It won’t be always be needed, but it is used to record the name of the person who gave us the records and under what circumstances. Explore existing accession records for examples.

Acquisition Type (Required): Choose from a drop-down list. A categorical descriptor for the type of acquisition. Repositories may customize the list of data values. Most commonly, you will select “Transfer” for institutional records.

Resource Type (Required): Choose from a drop-down list. Select the appropriate “Resource Type” (Records or Papers) from the drop-down menu. Note that Papers will only be used for personal papers acquired from outside the Getty.

Restrictions Apply (Required): Select the check box. A selected check box indicates that restrictions apply. The restrictions can be explained using the Access Restrictions Note and/or Rights sub-records, described below.

Publish (Required): *Clear the check box.* A selected check box indicates that this accession will be published to public (patron) interface – we **don’t** want that to happen.

Access Restrictions (Required): Select the check box. A selected check box indicates that access to the materials is restricted.

Access Restrictions Note (Required): Open text field. A statement indicating what materials in the accession have restrictions on access, what the authority of the restriction is, and for how long the restriction will be in effect. Default text should be supplied, if not use the following text:

The following types of records are permanently closed: records containing personal information, records that compromise security or operations, legal communications, legal work product, and records related to donors. The J. Paul Getty Trust reserves the right to restrict access to any records held by the Institutional Archives.

Use Restrictions (Required): Select the check box. A selected check box indicates that there are use restrictions for materials in the accession. The restrictions can be explained using the Use Restrictions Note and/or Rights sub-records, described below.

Use Restrictions Note (Required): Open text field. A statement indicating which materials have use restrictions, how the materials can be used, what the authority of the restriction is, and for how long the restriction will be in effect. Default text should be supplied, if not use the following text:

Contact <extref actuate="onrequest" ref=http://hdl.handle.net/10020/rights_repro show="new">Library Rights and Reproductions</extref> at the Getty Research Institute for copyright information and permission to publish.

*******NOTE:** Be aware of the following behavior in the ASpace application. The use and access restriction notes should probably translate to Resource Use and Access notes, but they do not. We will have to re-enter that information when spawning a new resource record.

Dates (Required)

This sub-record identifies and records the date(s) that pertain to the creation, assembly, accumulation, and/or maintenance and use of the materials being described. You may add multiple date fields and **should** add multiple fields if you need to convey inclusive and bulk ranges.

The screenshot shows a 'Dates' form with two entries. Each entry has a 'Label' dropdown set to 'Creation', an 'Expression' text field, a 'Type' dropdown, 'Begin' and 'End' date pickers, and 'Certainty', 'Era', and 'Calendar' dropdowns.

Label	Expression	Type	Begin	End
Creation	1999-2009	Inclusive Dates	1999	2009
Creation	2004-2009	Bulk Dates	2004	2009

Label: (Required) Choose from a drop-down list. Describes the type of activity that the date signifies. The Label "Creation" is our default.

Expression (Required): Open text field specifying the date or date range of the materials in the accession.

Type: (Required) Choose from a drop-down list. Indicate the type for normalized date information, either a single date or a date range (inclusive or bulk). Filling in the normalized date fields, that appear after you select a type, is not required, though you are welcome to do so.

Certainty (As needed): Choose from a drop-down list. Indicate the level of confidence for the information given in a date statement. This information is optional and should only be added when you are qualifying date information as potentially uncertain based upon the description or cataloging rules in use.

Era (Not used)

Calendar (Not used)

Extents (Required)

This sub-record is used for recording the size of the described materials in respect to volume, items, and containers. We use it as the basis for statistics that tell us how much space a collection actually takes up on a shelf.

You may add as many extent records as needed, but you must enter one for the whole of the accession.

An example of data entry might be to enter one extent record for the whole (portion) of the accession measuring the total volume, i.e. 10 (number) linear feet (type). You might then enter a second, third, etc. extent to measure parts of the collection, for example an extent part for a count of photographs, floppy discs, or artifacts. Always enter the whole physical volume in **linear feet** so statistics can be generated from the data.

Consistency in the type of measurement and the label you use for it is critical!

In the past we tracked digital volume in the user defined fields, now we will enter it here as **GB** as an Extent portion=part. It will give us a constant for generating digital volume statistics. To determine the digital volume of a set of files, right-click the folder in file explorer and select Properties. Use the number next to "Size" and not "Size on disk." Use digvol_calc.xlsm in \\prd-arj\arj1\ira_locked\BornDigital for volume conversions. [Note: using an abbreviation is NOT a good idea but SC wants to use it based on UC guidelines, so ...]

***If any part of an accession is physical: use extent portion Whole to track the physical extent and extent type Part to track the digital volume.**

***If the accession is entirely born-digital: use the extent portion Whole to track the digital volume**

Portion: (Required) Choose from a drop-down list. Used to specify whether an extent statement relates to the whole or part of a given accession. One extent statement must refer to the whole accession; additional extent statements should use Part.

Number: (Required) Open numeric field. A numeric value for indicating the number of units in the extent statement, e.g., 5, 11.5, 245. Use it in conjunction with **Type** to provide a structured extent statement. If needed, round to two decimal places.

Type: (Required) Choose from a drop-down list. A term indicating the type of unit used to measure the extent of materials described. For whole Extents, the defaults are Linear Feet or, if the entire collection is digital and takes up no shelf space, GB for gigabytes.

Container Summary (Required): Open text field. A list of container and container types housing the materials described in the component record. Example of use, if the Number and Type are 10 linear feet then the container summary might be used to record the actual number of containers (10 boxes and 4 flat files)

Physical Details (Rarely used): Open text field. Other physical details of the materials described, e.g., analog, black and white, negatives.

Dimensions (Rarely used): Open text field. Dimensions of the materials described. May be used for dimensions of crates

Agent links (Required)

This sub-record associates an agent as a creator, source, or subject of the materials described to provide information about their context. The required fields are **Role**, **Relator**, and **Agent**. You may add as many Agent links as needed. Our Creators and Sources are most commonly corporate bodies (departments, programs, etc.).

If the name you need already exists in the system, use it. If the name is not in the system, search for it in LC using the LCNAF import and by searching within LCNAF directly. **If an authorized name already exists, use it by**

downloading it through the LCNAF import. You can enter the name or the NACO number into the search box. Next look in ULAN or other standard vocabularies for the name you need, and create the name in ASpace based on the information in those sources. If you can't find the name then create it in accordance with DACS and RDA.

You must add names for the party transferring the records (Source) and for the party who created/compiled the records (Creator/Complier/Collector). When linking the agent to the record assign the appropriate functions and roles. If the transferor and creator/compiler are the same, enter the same name twice, each time with the correct role.

The screenshot shows a web interface titled "Agent Links" with an "Add Agent Link" button in the top right. It contains two distinct entry forms. The first entry has a "Role" dropdown set to "Source", a "Relator" dropdown set to "Depositor", and an "Agent" dropdown set to "Getty Conservation Institute. Field Projects Division". The second entry has a "Role" dropdown set to "Creator", a "Title" text field, a "Relator" dropdown set to "Creator", and an "Agent" dropdown set to "Getty Conservation Institute. Field Projects Division". Each entry has a small "x" icon in the top right corner for removal.

Role: (Required) Choose from drop-down list. An indication of what role (creator, source, or subject) the agent has in regards to its link to a certain material description record. [Note that if you choose a Role=Creator, the screen will present a Title field to complete or not, as you choose. In that context, Title refers to the title of a work, thereby enabling the recording of name/title statements such as "Olson, Charles. Maximus Poems". We do not use this!]

Relator: (Required) Choose from drop-down list. A more specific indication of what role the agent has in respect to the materials being described. For example, an agent may be linked as a creator to a record, but with the more specific role of "creator," "collector," etc. Our default relator for a role of Source is "Depositor".

Agent: (Required) Choose from drop-down list. The Agent related to the material described in the record. Agents may be searched using auto-complete, using a browse function, or may be created on demand.

Related Resources (As Needed)

This field allows you link an accession to an existing Resource. You may add as many Resource links as needed.

When entering a new accession record, you will only need to spawn a new resource if you plan to immediately move on to creating a box list in the resources module. Note: do not actually spawn a new resource record from

the accession until the accession record has been completed and saved - the accession fields fill out some of the resource fields.

If you choose to add a related resource you must do the following:

Resource: (Required) Choose from drop-down list. A repository resource related to the material described in the record. Resources may be searched using auto-complete, using a browse function, or may be created on demand.

Find the resource you want to link to in one of two ways. Either use the auto-complete function in the Resource box or click the drop-down list button and then click Browse and browse the resources in your repository.

Related Accessions (As Needed)

This field allows you to link one Accession to another Accession. Links between accessions can be established to reflect a hierarchical or sibling relationship among associated materials. One might establish links between accessions of related material from the same donor that happened to arrive years apart. One might also link together accessions that have been broken out from another. If you choose to add a related accession you must do the following:

Relationship type (Required): Choose from drop-down list. The options are “Part of” relationship and Sibling relationship. Once the type is selected three required fields will be displayed.

This Accession: (Required) Choose from drop-down list. Select the appropriate term to describe the relationship. “Part of” relationship provides two options; Sibling Relationship provides one option.

Accession: (Required) Choose from drop-down list. A repository accession related to the material described in the record. Accession may be searched using auto-complete, using a browse function, or may be created on demand.

Relator Type: (Required) Choose from drop-down list. Select the appropriate term to describe the relationship. Each type relator currently has only one option.

Find the Accession you want to link to in one of two ways. Either use the auto-complete function in the Accession box or click the drop-down list button and then click Browse and browse the accessions in your repository:

Subjects (Not Used)

This sub-record associates subjects with the materials described to provide information about their context.

External Documents (As Needed)

This sub-record allows links to information in other description or management systems, such as donor files or processing plans. The “External Documents” field has been used to point to a related digital file or inventory. Note - the field only stores the link to the file, not the actual file.

Title: (Required) Open text field. The title of an external document referenced from the accession record. The document may be of any form or content. A web accessible file, a network accessible file, a file on the same computer as the application, etc.

Location: (Required) Open text field. The location of the file, ideally a resolvable URI. Examples: <http://www.archivesspace.org/membershipfile:///c:/path/to/the%20file.txt>

Publish: Clear the check box. A selected check box indicates that this External Document will be published to public (patron) interfaces. Note that this publish function operates independently from the publish box in the Basic Information

Rights Statement (Not Used)

This sub-record contains information about the rights status of the materials described and whether there are specific restrictions or permissions that have been indicated.

The field has not been used so far – please discuss potential use with the Department Head. The Rights Statement record allows the option of linking to an external document. You may add as many rights statements and/or subsidiary external documents as needed.

The screenshot shows a web form titled "Rights Statements". At the top right is a button "Add Rights Statement". Below the title is a field for "Identifier" with the text "-- auto-generated upon save --" and a close icon. There is a checked "Active" checkbox. A "Rights Type" dropdown menu is open, showing options: "Institutional Policy", "Intellectual Property", "License", and "Statute". Below this is a section titled "External Documents" with a button "Add External Document". Underneath is a form for an external document with fields for "Title", "Location", and a "Publish?" checkbox. The form has plus signs at the bottom to indicate it can be expanded. A large diagonal watermark "SAA Museum Archives Section Working Group Example" is present over the entire form.

Identifier: Uniquely identifies the rights statement within the repository domain. Rights Statement identifiers are auto-generated by the application.

Active: Select or clear check box. A selected check box indicates that the rights record is active.

Rights Type: (Required) Select from drop-down list the basis for the rights statement being made. Four bases are allowed: intellectual property; license, such as donor agreement; legal statutes such as Fair Use or FERPA, and institutional policy. We will normally use Intellectual Property or Institutional Policy.

Depending on which Rights Type you select, a variety of different rights related fields will appear. Again, please discuss any potential use of these fields with the Department Head. Use the external documents section to link to a copy of the relevant contract.

Instances (Required)

An instance may document both physical and digital manifestations, for example, a box of paper correspondence and additional digital content (whether digitized or born-digital). This is also where you indicate where the physical material described is located in the stacks. You may add as many instances or digital objects as needed.

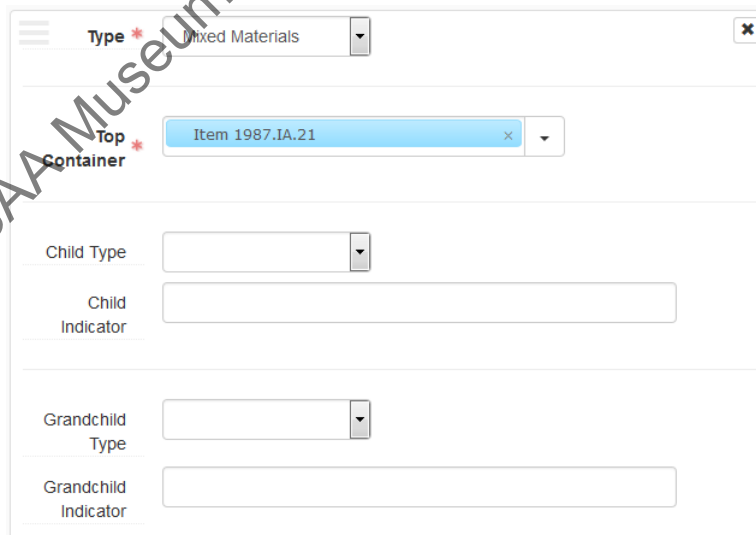
Note: We will not assign digital objects to accessions unless the link to the content in Rosetta. For content living on ARD-PRJ, we will link to the server location using the External Documents section.

To create a new Instance do the following:

1. On the **Instances** bar for the Accession, click on **Add Container Instance** if the instance declaration is for analog content or on **Add Digital Object** if the instance declaration is for digitally available content.



2. Select the **Type** of instance you wish to declare and indicate the **Top Container**.

A screenshot of a form for declaring an instance. The form has a title bar with a hamburger menu icon, a "Type" dropdown menu set to "Mixed Materials", and a close button. Below the title bar, there is a "Top Container" dropdown menu set to "Item 1987.IA.21". Underneath, there are two rows of fields: "Child Type" with a dropdown menu and "Child Indicator" with a text input field. The final row contains "Grandchild Type" with a dropdown menu and "Grandchild Indicator" with a text input field.

Type: (Required) Choose from drop-down list. A designation of the manifestation for the described materials. Our default is Mixed Materials. For an individual document, you might consider "Text".

Top Container: (Required) Three selection options: 1) start typing to filter the existing containers and auto-complete the field; 2) use the down arrow to browse the existing locations; 3) use the down arrow to create a new location.

Child Type (Not Used): This is where folder/item labels would go but is rarely/never used at the accession level

Child Indicator (Not used): This is where folder/item numbers would go but is rarely/never used at the accession level

Grandchild Type (Not Used)

Grandchild Indicator (Not Used)

3. If you need to create a new Top Container, you will see a blank template.

The screenshot shows a web form titled "Create Top Container". The form has several input fields: "Container Profile" with a search box and dropdown, "Container Type" with a dropdown, "Indicator *" with a text box, "Barcode" with a text box, "ILS Holding ID" with a text box, and "ILS Item ID" with a text box. Below these is a section for "Exported to ILS" with two radio buttons: "Exported to ILS" and "Not exported". At the bottom, there is a "Locations" section with an "Add Location" button. A large diagonal watermark reads "SAA Museum Archives Section Working Group Example".

The only required field for a top container is **Indicator**.

Container Profile (Not Used)

Container Type (Required) – enter the type of container using the drop down, our default is "Box"

Indicator: (Required) Open text field. An alphanumeric expression for indicating the place of a container in a sequence of containers. If listing a string of boxes, use a leading zero for the first number, if appropriate, so containers will sort in order. Examples: 2015.IA.01-01 or 2015.IA.01-02 thru 06 or 2015.IA.01 – 01, 03, 05, 07, 09-11

Barcode (Not Used)

ILS Holding ID (Not Used)

4. Save the record.

Once the top container information is added, it can be linked to a **Location** record. This can be done at the time the container is created or later. To do so, open the top container record by either navigating to it in the accession record or through the **Manage Top Containers** module by searching for the accession number in the keyword search (use this format: "1986--IA--01") OR for the accession title in the accession box:

The screenshot shows the 'Institutional Archives' system interface. A dropdown menu is open, showing options: 'Manage Groups', 'Manage User Access', 'User Preference Defaults', 'Manage Top Containers' (highlighted), 'Transfer Repository', 'Background Jobs', 'Reports', and 'Plug-ins'. Below the menu is the 'Top Containers' search form. It includes the following fields and controls:

- Keyword:
- Barcode(s):
- Resource:
- Accession:
- Container Profile:
- Location:
- Exported to ILS:
- Unassociated containers:
- Search:

1. Select **Add Location** at the bottom of the **Top Container** record.
2. Indicate the current location for the container.
3. Indicate the date the container was stored at the location.
4. Select a **Location** record to link to the top container. If you cannot find an appropriate location, talk to the Department Head and have her create one!

The screenshot shows a web form titled "Locations" with an "Add Location" button in the top right corner. The form includes the following fields:

- Status:** A dropdown menu with "Current" selected.
- Start Date:** A text field containing "2014-03-02" and a calendar icon.
- End Date:** An empty text field and a calendar icon.
- Note:** A large, empty text area.
- Location:** A dropdown menu showing "Overly Gothic Library, Main, YNHSC, Stacks" with a sub-selection "[Range: 1, Section: A, Shelf: 1]".

5. Save the record.

Status: (Required) Choose from drop-down list. The options are Current or Previous. Repositories may not customize the list of data values. We will not use previous – it has some unfortunate side-effects.

Start Date: (Required) Intended to reflect the date the material was moved to the location. Use the calendar button as needed.

End Date (Not Used – required if status is Previous): Choose from drop-down list. Intended to reflect the date the material was removed from the location. Use the calendar button as needed.

Note (As Needed): Open text field.

Location: (Required) Three selection options: 1) start typing to filter the existing locations and auto-complete the field; 2) use the down arrow to browse the existing locations; 3) use the down arrow to create a new location.

Deaccessions (As Needed)

Deaccessioned material may have been returned to its source, transferred to another repository, stolen, discarded, etc.

Deaccessions
Add Deaccession

Portion *

Part

Description *

Deaccessioned boxes 10-38, 41-82 (71 boxes).

Boxes 39 and 40, containing records pertaining to the opening of the Getty Villa, were retained and renumbered boxes 10 and 11.

Reason

Records contained mundane accounts payable that had met retention.

Disposition

Shredded 02/12/2009

Notification Given?

Deaccession Date

Label *

Deaccession

Expression *

2009-02-02

Type *

Single

Begin

2009-02-02

e.g. YYYY, YYYY-MM, or YYYY-MM-DD

Certainty

Era

ce

Calendar

Extents
Add Extent

Portion *

Whole

Number *

44.45

Type *

Linear Feet

Container Summary

Deaccessioned boxes 10-38, 41-82 (71 boxes).

Boxes 39 and 40, containing records pertaining to the opening of the Getty Villa, were retained and renumbered boxes 10 and 11.

Physical Details

Dimensions

SAA Museum Archives Section Working Group Example

Fill in the following fields as required or needed:

Portion: (Required) Choose Whole or Part from drop-down list. Used to specify whether an extent statement relates to the whole or part of a given accession.

Description: (Required) Open text field. Description of the materials that have been deaccessioned.

Reason (Required): Open text field. The reason for deaccessioning the materials described.

Disposition (Required): Open text field. A description indicating what was done with the deaccessioned materials.

Notice Given (As Needed): Select or clear the check box. A selected check box indicates that notification of the deaccession was given, typically to the source of the materials being described.

Deaccession date (Required)

Fill in the fields as you would for the main dates, just use the date on which the deaccession was done

Deaccession extent (Required)

Fill in the fields as you would for the main extent, just supply the volume of material that was deaccessioned. [Note: when data migrated the description field information was duplicated in the container summary – it can be removed from the container summary.]

Collection Management (Required)

This sub-record is used to add internal-only information about how the materials will be processed or have been processed. There are no required fields, though **Processing Total Extent** and **Extent Type** must be used together. You can only have one collection management record per accession.

The screenshot shows a web form titled "Collection Management" with a sub-header "Add Collection Management Fields". The form contains the following fields and controls:

- Processing Priority: A text input field with a dropdown arrow and a close button (X).
- Rights determined?: A checkbox.
- Processing Plan: A large text area with a resize handle (three dots).
- Processors: A large text area with a resize handle (three dots).
- Processing hrs/unit Estimate: A text input field.
- Processing Total Extent: A text input field.
- Extent Type: A dropdown menu.
- Total Processing Hours: A text input field.
- Funding Source: A large text area with a resize handle (three dots).
- Processing Status: A dropdown menu.

Processing Priority (Required): Choose from drop-down list. Indicates the priority assigned to processing of an archival unit. Select a procession priority as appropriate, based on a subjective balancing of immediate research need, physical fragility, and available staff time.

Rights Determined (Discuss Potential Use with Dept. Head): Select or clear check box. A selected check box indicates that the rights for an archival unit (accession, resource, or digital object) have been determined and there is a rights record created and linked to the archival unit.

Processing Plan (As Needed): Open text field. For recording a plan for processing of the archival unit. The plan may include an outline of the arrangement for the archival unit, as well as instructions for how to treat particular objects in the archival unit. The plan might also specify different assignments for different repository staff.

Processors (Not Used): Open text field. For listing staff to whom processing of the archival unit (accession, resource, or digital objects) has been assigned.

Processing Hours Estimate (Not Used): Open text field. The time a repository estimates that is required to process a unit of archival materials (e.g. a linear foot or an item in the case of digital objects). The estimate may factor in, or not, the production of finding aids, catalog records, and other access products.

Processing Total Extent (Not Used): Open text field. A numerical expression for the total extent (cubic feet, linear feet, items, etc.) processed.

Extent Type (Not Used): Choose from drop-down list. A term indicating the type of unit used to measure the extent of materials described.

Total Processing Hours (Not Used): Open text field. The numerical result of multiplying "Processing hours per foot estimate" by "Processing total extent"

Funding Source (Not Used): Open text field. Used to indicate the source of funding the processing of the described materials.

Processing Status (Required): use drop down to complete. (Note: this data was lost when we migrated from Archivists' Toolkit and had to be re-entered).

Classifications (Required)

This sub-record is used for linking an accession to a Classification or a Classification Term. An accession may only have one classification link.

Classifications Add Classification

Classification * ✕

Classification: (Required) A collection category under which the accession is grouped. Classifications may be selected using auto-complete or using a browse function. They may not be created on demand.

Choose the appropriate category from the following standardized list:

- 1. Trust Records
- 1.1. Admin Records - Foundation
- 1.2. Admin Records - GCI
- 1.3. Admin Records - GEI
- 1.4. Admin Records - GII
- 1.5. Admin Records - GRI
- 1.6. Admin Records - Museum
- 1.7. Admin Records - Trust
- 1.8. Buildings and Grounds
- 1.9. Collaborative Projects and Philanthropy
- 1.10. Oral History
- 1.11. Press and Media Coverage
- 1.12. Public Programming and Publications
- 1.13. Staff Events
- 2. Collected Papers
- 2.1. Getty Family
- 2.2. J. Paul Getty Trust Affiliates

Events (Required)

Note – Within the accession record, you can only see the events that are currently assigned to an accession if you are looking at the record in "View" mode.

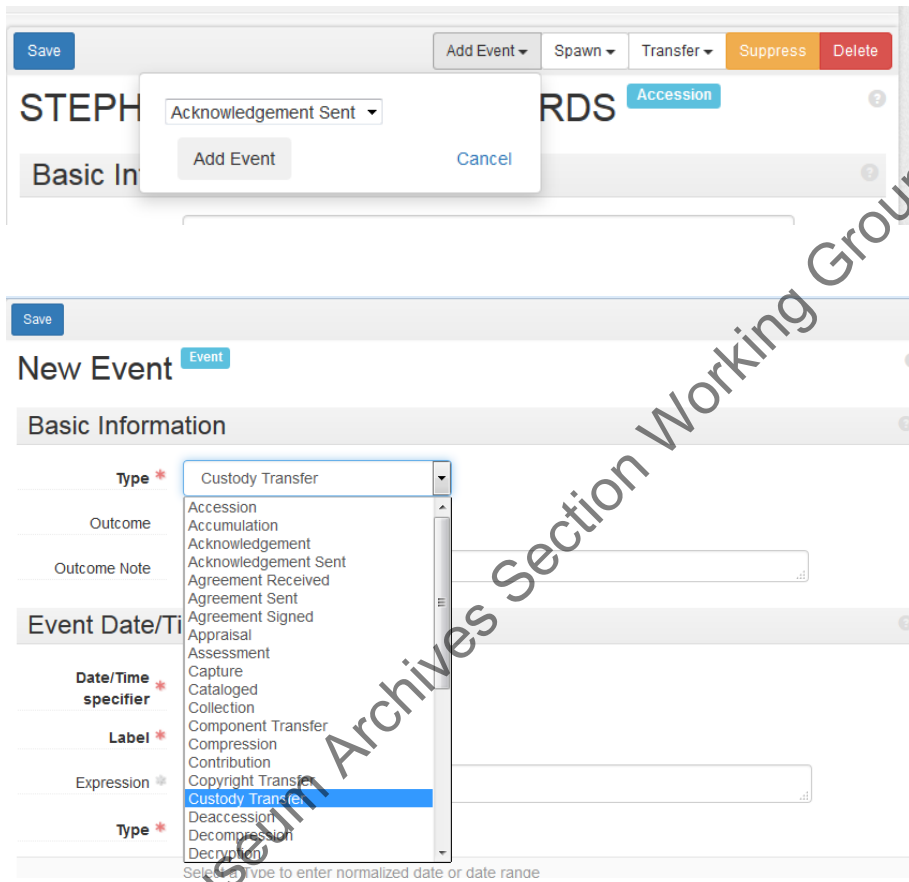
Custody Transfer (Required): Add the name of the staff member taking custody of the accession as "Recipient." Enter the date you took possession and use "Event" for the date Label. If the accession is an external donation or acquisition, enter the name of the Head of the IRA department.

Ingestion (Used by Lorain as needed): Add the name of the staff member ingesting the accession's digital content into Rosetta as "Implementer." Enter the date of the ingestion and use "Event"

for the date Label. Use the Outcome Note to record any notes about the ingest and include the Rosetta IE number.

Virus Check (Used as needed): Add the name of the staff member performing a virus check on the accession's digital content as "Implementer." Enter the date of the check and use "Event" for the date Label. Use the Outcome Pass/Fail and Outcome Note to record any notes about the check.

Use of other types of events should be determined by the department head in consultation with the department members.



Fill out the fields as follows:

Basic Information

Type * Custody Transfer

Outcome

Outcome Note

Event Date/Time

Date/Time specifier * Date Subrecord

Label * Agent Relation

Expression * January 2006

Type * Single

Begin e.g. YYYY, YYYY-MM, or YYYY-MM-DD

Certainty

Era

Calendar

Agent Links

Role * Recipient

Agent * Nancy Enneking

Record Links

Role * Source

Record * STEPHEN GARRETT'S RECORDS

Type (Required): “Custody Transfer” or the appropriate processing status

Outcome (As needed) – For notes about the virus check

Outcome note (As needed) – for notes about the Virus check or ingestion, for the latter case include the Rosetta ID number

Date/Time specifier (Required): Choose “Date Subrecord” if not automatically selected.

Label (Required): Choose “Event” (changed from "Agent Relation" in July 2019)

Expression (Required): Fill in the date custody was taken, the date of ingest, or the date a virus check was performed.

Type (Required): Choose the correct type (most likely single)

Normalized Begin and/or End dates (Not Used)

Certainty (Not used)

Era (Not Used)

Calendar (Not used)

Agent link -Role (required): Choose "Recipient" for Custody Transfer; choose "Implementer" for virus check or Ingestion

Agent link - Agent (required): Choose the name of the staff member

Record Link – Role: Should be automatically populated

Record Link – Record: Should be automatically populated

User Defined Fields (As Needed)

Boolean 1 has been relabeled "Contains digital content." Check the box if the accession contains digital content of any kind - floppy disks to born-digital files.

Contains digital content	<input checked="" type="checkbox"/>
Boolean 2	<input type="checkbox"/>
Boolean 3	<input type="checkbox"/>

At the moment, the following string and text fields are used for the prior accession number (used before the accessions were renumbered in 2005) and for any notes about the renumbering process. It is unlikely that you will have to enter this sort of information in the future, but you will find it in older records. **This data cannot ever be cleaned out of the system.** We stopped using "Curator" once we started creating events and we stopped using "Collection Category" once we started using Classifications. The data in those fields has been replicated in other modules, and can be cleaned out of the user defined fields if the fields are needed for future purposes. "DAO accession" is used by Special Collections to group digital objects.

Curator	<input type="text"/>
Prior Accession	<input type="text"/>
Collection Category	<input type="text"/>
DAO Accession	<input type="text"/>
Accession Renumbering Notes	<input type="text"/>

Two text fields are used to record actions taken on digital files and to document content loaded into the Getty's digital asset management system.

Digital File Mgmt Notes	Copied files from CD using Bagger. Disc discarded. LW 4/2/2019
DAMS	

Reports

When finished with the data entry, generate a printed report for the accession file. These have yet to be remotely helpful in ArchivesSpace. **Nancy can produce a more complete report using Crystal, so you can always ask her to generate the page, or wait and ask her to print them quarterly.**

SAA Museum Archives Section Working Group Example

APPENDIX A: The History of Institutional Archives Accessions

General History

Because of the nature of the Trust's work and the backgrounds of the people who were hired to do the work, the Trust and its staff have always had a general tendency to keep everything. This doesn't mean we won't find gaps in the record, but we suspect that the gaps will be further and fewer between than any other organization whose records have suffered from benign neglect for 50 years.

The J. Paul Getty Trust has created records that it believes to be of permanent value since its inauguration in 1953. One of the first indications of the management and appraisal of institutional records occurred in 1965, less than 3 months into the Museum Curatorship of Burton Fredericksen. His first progress report to J. Paul Getty on August 6, 1965 states that he has compiled all previous correspondence and comments on the individual artworks into a single file that anyone could use. He thought it was necessary to organize the material to prevent information from being forgotten and felt this hadn't been done before because Wescher and Jones (the former Curators) had been around since the founding of the Museum and had known the contents of the letters. While compiling the correspondence, he also reorganized almost all of the Museum's back files, combining redundant folders and discarding a 10-year accumulation of material that no longer had value.

Though the management of records undoubtedly continued in an ad-hoc way behind the scenes, the topic resurfaces in the early 1980s when Nicholas Olsberg was brought in as a consultant for Archives and Records Management. Olsberg seems to have written two reports, the first in January 1982 and a follow-up in the summer of 1983. In his 1983 report he provides the following summary of the situation to-date:

The J. Paul Getty Museum has established a modest archives and records program, designed to govern the manner in which records are retired from active office status and to provide protection for and reference to closed records of permanent value. The program is run by a single half-time museum archivist who doubles as a library assistant [Mitchell Hearn Bishop]. He acts as curator for records moved into the archives; advises offices on the disposition of non-current files, for which general schedules governing retention periods have already been established; and provides, according to policy guidelines on access, information or documents drawn from archives files. No provision has yet been made for the housing of the records that are retained for the short term to fulfill the requirements of the schedule but could be maintained outside working offices. Nor does the amount of personnel time allocated to archives permit the archivist to undertake any elaborate reviews of files or information systems. The museum archives has a limited set of collection goals: it is essentially restricted to records that relate to the administration of the museum itself, to the role of Mr. Getty as the founder, and to such records of the Getty Trust (up to the last few years) as bear directly on the work of the museum and on its collections. Apart from plans to re-capture missing documentation through the compilation of oral histories, no attempt has been made to extend the archives' role in the collection of other archival resources within the Trust; into Records Management of files outside those of the museum itself; or into the evaluation and collection of other manuscript resources relating to the areas of art in which the Trust is interested. The archives was established as a result of consultant review, and now operates with periodic consultant support in the setting of annual objectives and the development of professional standards.

At about the same time, in 1983, the Trust established the Getty Center for the History of Art and the Humanities (GCHAH) which, from the outset, worked to establish a library and archives geared toward fostering

advanced research in art, its history, diversity, and cultural meaning. [Nicholas Olsberg actually became the founding head of the Archives of the History of Art in the GCHAH from 1984-1989.] The GCHAH staff understood the importance of maintaining a historical record of the Getty but the management of its records was not their primary purpose. Instead, they were to focus on the collection of manuscript resources relating to the areas of art in which the Trust was interested. Therefore, in spite of early recognition of the need to better manage the material (and the active records), the Getty's institutional records simply accumulated on the back shelf of the stacks in the GCHAH. [Editorial note: I suspect some of the accumulated material to have been the museum records that Mitchell Bishop had been managing, given the contents of the first accession.]

In 1986, as institutional records continued to accrue, the Special Collections (SC) Registrar began to assign them accession numbers, recognizing that some sort of administrative control over the records was badly needed. The numbering of Special Collections accessions started in 1984, with a format of YY####. The staff/Registrar wanted to make a point of using similar practices for institutional records while visibly distinguishing between SC and institutional records. To accomplish both goals, it was decided that all of the institutional numbers would be assigned based on a year date of 1983, since no SC material would ever have a 1983 accession date. Unlike the SC system, the year "1983" was not intended to have any relationship to the actual year in which the material was received. The numbers were assigned to institutional records, consecutively, in a format of 83####, starting with 830001 in 1986 and continuing to 830151 in 1999. The first number (830001) was assigned to the assorted records that had been gradually accumulating on the shelves.

As the GCHAH evolved over the years the Photo Study Collection was merged into Special Collections, bringing with it accession numbers in the format of "YY.P [for photo study].###", a practice in use since 1982. Thus, the "83" prefix no longer uniquely designated the institutional records. Additionally, because of the increasing numbers of accessions of photographic materials into SC, the Registrar implemented a different accession number format for new accessions that were predominantly photographic in nature, developing the "YY.R [for rare photos].##" system. As with the paper materials, the institutional records accessions that were composed largely of photographs were included in the newly added system and given the "83" prefix by default. This system was used, in addition to the 83#### system, for institutional material starting with 83.R.1 in 1994 and continuing until 83.R.38 in 2003. When the staff and collections moved to the Getty Center, all of the YY.R.## accessions were placed in Vault 4 and the accession numbers were treated as locations. The institutional ".R." accessions have not, however, been stored in Vault 4 for some years, so the call number no longer acts as a location.

In 2000, because of Y2K issues, the Registrar began using a 4-digit year and, simultaneously, began using an "M" infix to designate Special Collections material (YYYY.M.###), distinguishing manuscript material from rare photos and the photo study collection. As in the other cases, the format of institutional records accession numbers also changed (though the year of 1983 continued to be used) and from 2000 to 2004 the numbers 1983.M.152 through 1983.M.158 were assigned (though, for unknown reasons, one of the numbers was actually assigned to materials that seem to have arrived in 1993 and several accessions were accidentally given two numbers – one in each numbering system).

The Trust formally began its Institutional Records and Archives program when David Farneth was hired as the Institutional Archivist in 2001. After his arrival, from 2001 until 2003, records were assigned temporary accession numbers, which were simply the date of arrival in YYYYMMDD format. Materials assigned these numbers were never actually accessioned or described in any existing system. Simultaneously, however, some records continued to pass through the Registrar's office and were assigned accession numbers in the formats described above. In 2004, institutional records finally started to be accessioned using the actual year of accessioning combined with an "IA" infix, resulting in a format of YYYY (current year).IA.XXX.

Accession numbers continued to be assigned by the GRI Registrar until the Fall of 2005 when the Archives staff took over all accessioning of Institutional Archives records. The Archives Manager immediately took steps to organize and regularize the accession numbering system to facilitate the future use and management of the archival holdings. Examining the systems used up until that time, the Archives Manager created the following summary:

Numbering system	Years of use
83####	1986-1999
83.R.## (also occasionally seen as 1983.R.##)	1994-2003
1983.M.### (note some confusion with later 83####, and vice versa)	2000-2004
YYYYMMDD (these were David's temporary numbers, the records were never formally accessioned)	2001-2003
YYYY.IA.##	2004 - present

The Manager believed the YYYY.IA.## system was the most useful and informative and renumbered and standardized all the accessions using this format. The 2004 and 2005 accessions needed no revisions (except for 1983.M.158). All other accession numbers, and references to them, also had to be changed.

To accomplish the change in numbers, starting in September 2005, the Institutional Archives Manager did the following:

1. Took the existing spreadsheet derived from the original accession logs and
 - a. set aside the accessions that had already been irretrievably merged into other accessions at some time in the past [some accessions had been assigned numbers and then (usually shortly after they arrived) merged into other accessions, effectively causing them to disappear, usually with no record of their original contents];
 - b. assigned new numbers to the accessions that could be located and identified;
 - c. used this list as the master for all renumbering.
2. Renumbered the actual boxes. Folders within boxes were renumbered when possible, but some will not be caught until the records are processed.
3. Renumbered the locations database.
4. Cross-checked the locations database against the boxes to look for discrepancies.
5. Corrected errors.
6. Renumbered the finding aids.
7. Collected, merged and renumbered the accession/central/research files.
8. Provided Collection Development staff with the new number for their records of what used to exist in the Central Files.
9. Checked with Conservation (Mary Sackett).
10. Checked with Deb Lenert regarding VMS numbers that may need to be changed in their records and in electronic images.
11. Checked with Jonathon Furmanski for numbers that may have existed in his reformatted database.
12. Checked with Karin Lanzoni for exhibition materials and the negatives in the reading room [Karin had a work-study student renumber the negatives for us – they were partly done as of January 2007].

13. Renumbered all of our versions of electronic inventories and accession lists and our in-house locations and spreadsheets.
14. Imported data into TMS with the new numbers and edited the existing TMS records to change the object numbers. The old numbers went into TMS as alternate numbers and are searchable as such.
15. When possible, entered data on the subsumed accessions (1a above) into the appropriate TMS record to ensure the basic data and events were captured.
16. Renumbered all of the Voyager records.
17. Placed printouts of the spreadsheets with the old and new numbers in
 - a. the Reading Room with the original logbooks;
 - b. the accession files;
 - c. on F:\GETTY\GRI\Institutional Archives\COLLECTIONS MANAGEMENT\Archives Accessions\IA accession renumbering final.xls.

This renumbering process was essentially completed in December 2005, though the old numbers will undoubtedly crop up from time to time, particularly on old folders and photograph sleeves. If staff find one of these old numbers, they should consult the renumbering spreadsheet or ArchivesSpace (where the old numbers can also be found) and change the number.

Past Managers and Staff of Institutional Records

Memos in our accession files indicate that the individuals responsible for Institutional Records in the past include:

- 1) Mitchell Hearn Bishop was working on a half-time basis with the Institutional Records from [pre?] Summer of 1983 until at least March of 1987 (during which time the records moved from the butler's pantry in the Ranch House to the GCHAH). He produced what may be the first inventory of institutional records in the autumn of 1983 [see 1993.IA.01 box 42].
- 2) Kevin Mulroy was involved with Institutional Records and bore the title Assistant Archivist in 1987.
- 3) Nicholas Olsberg's (under whom Bishop and Mulroy worked) is the only name that appears in conjunction with institutional accessions from 1988 until his departure in 1989.
- 4) Claire Lyons? may have had some oversight of institutional archives in the 1990s.
- 5) Wim de Wit, Head of Special Collection, seems to have been the next de facto person responsible for the Institutional Records until 2001.
- 6) David Farneth arrived as the founding head of the Institutional Records and Archives Department in 2001.
 - a. Ian Johnston was hired as Assistant Archivist in 2002, and Nancy Enneking was brought on as the Processing Archivist in September of 2004.
 - b. Ian Johnston left in July of 2005; Nancy Enneking became the Institutional Archives Manager in August 2005.
 - c. Leah Prescott was hired as Assistant Archivist and began work in late February, 2006.
 - d. Leah was promoted to Digital Projects Coordinator in January of 2007 (but still consults with the Institutional Archives); Rebecca Fenning was hired as the new Assistant Archivist in May of 2007.
 - e. Rebecca Fenning left in April 2008; Cyndi Shein was hired as the new Assistant Archivist in October 2008.
- 7) Nancy Enneking was made Head of Institutional Records and Archives in 2009.
 - a. Cyndi Shein left the Getty in February 2014. Katie Duvall was hired to fill her position in April 2014.
 - b. The department was reorganized in the summer of 2014, doing away with the Records/Archives distinction. Thereafter each staff person was assigned a program and was expected to be

- responsible for all records and archives functions for each program, working jointly with other IRA staff to maintain Trustwide standards, policies, and procedures. The department was given two more professional positions.
- c. Sara Seltzer and Lorain Wang were hired in October 2014. Helen Kim was hired January 2015, following Katie Duvall's departure. Sara Seltzer left on July 1, 2019. Helen Kim departed in October 2021.
 - d. Jennifer Thompson, a member of the Records and Archives Department since 2004, began taking on Archival work in 2014.
 - e. Alexis Adkins was hired in March 2021. Allison Waite was hired in June 2022.

SAA Museum Archives Section Working Group Example