

**Archivists' Toolkit**

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## How to Enter a Box List (Inventory/Finding/Aid) into Archivists' Toolkit (AT)

Log in to AT and double click the Resources link in the sidebar. Type in the collection number you need to enter the inventory for in the search box, and double click it in the results field.

The screen will look like this when you open the collection:

The screenshot shows the Archivists' Toolkit (AT) interface. The top bar indicates 'Record 10 of 1408'. The main content area is titled 'Resources' and shows a search for 'Weather Maps (daily)'. The search results list '1955-011: Weather Maps (daily)'. The 'Finding Aid Data' section is active, showing the following fields:

- Level: collection
- Title: Weather Maps (daily)
- Date Expression: unknown date
- Inclusive Dates: Begin, End
- Bulk Dates: Begin, End
- Language: English (eng)
- Repository Processing Note: (empty)

There are also buttons for 'Add Instance' and 'Remove Instance'. The bottom of the screen features a navigation bar with buttons for 'First', 'Previous', 'Next', 'Last', 'Reports', 'Close', and 'Save'.

Open the original finding aid in the INV folder in the V drive. If there's not an original finding aid, skip this step.

Make sure the Level box says collection. In the title box, type this: Guide to the XXXXX Collection.

In the Date Expression section, do the following:

If there's only one year listed in the Dates field of the original finding aid, put it in the Date Expression box. If there are multiple years, then put them the Inclusive Dates boxes. If there are bulk dates listed, put them in the Bulk Dates boxes.

Date Expression

Inclusive Dates

Begin  End

Bulk Dates

Begin  End

Now it's time to enter the box list.

Click here:

**Resources**

Title: Library Bulletins (Oklahoma A & M College)

- 1955-010: Library Bulletins (Oklahoma A & M College)


Basic Description

Level

Other Level

Title

Library Bulletins (Okla



And then click the **Add Child** button at the bottom of the big white box.

Once you've clicked Add Child, choose Series from the Level menu. Then, type in the Title box Series I: Title of Series. It should look like this when you're done:

**Resources**

Title: <title render="bold">Guide to the Henry G. Bennett Speeches Collection</title>

- 1955-015: Guide to the Henry G. Bennett Speeches Collection
- Series I: Published Texts/Manuscripts

Basic Description

Level

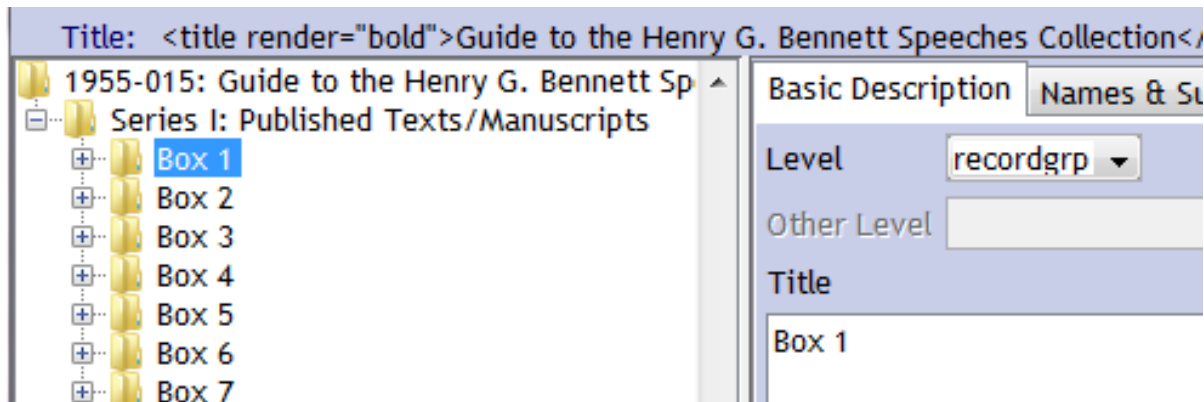
Other Level

Title

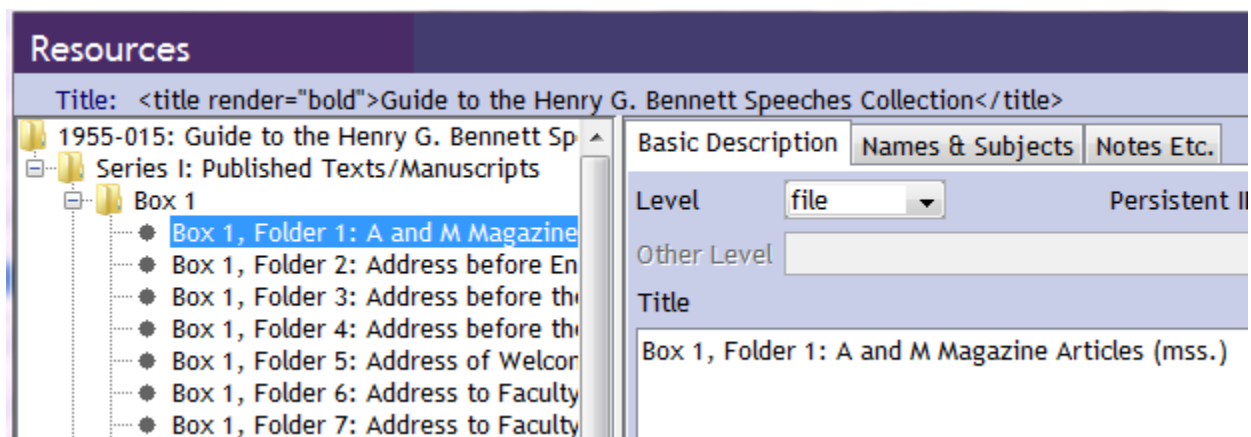
Series I: Published Texts/Manuscripts

Make sure the Series I: Title of Series is highlighted blue in the big white box. Click on it if it isn't. Once it's blue, click the **Add Child** button again.

This time, choose **recordgrp** from the Level menu. In the Title box, type in Box #.



Make sure Box 1 in the big white box is highlighted. Once it is, click the **Add Child** button again. Here is where you're going to start entering in the items from the finding aid. In the Level menu, choose **file** if you're doing folders. If it's an individual item (like a mug, book, or something that's not in a folder), choose **item** instead. In the Title box, type in Box 1, Folder 1: Title of folder. Like this:



**Dates do not go in the Title box!!** Unless the date is part of the title of a book, magazine, article, etc., like *Dress Clothes in the 1940s*, the date goes in the Date Expression fields below the Title box. The date includes Month, Semester, Season, Year, Day, or any combination of those.

If there's a single date, put it in the Date Expression field. Examples: January 14, 2011; Spring 1940; 1952; April 1980. If there's a range of dates, put them in the Date Begin and End fields. Examples: 1952-1958.

However, if there are months, seasons, or days mentioned when there are a range of dates, put them in the Date Expression field, e.g., January 14, 1932-January 22, 1933.

Here are some examples

Full single date:

G. Bennett Speeches Collection</title>

Basic Description Names & Subjects Notes Etc.

Level file Persistent ID ref11

Other Level

Title

Box 1, Folder 2: Address before Enid Meeting of Cooperatives

Wrap in tag...

Date Expression January 15, 1940

Date

Date Begin Date End

Insta

Ins

Single year:

Basic Description Names & Subjects Notes Etc.

Level file Persistent ID ref12

Other Level

Title

Box 1, Folder 3: Address before the DAR

Wrap in tag...

Date Expression 1947

Date

Date Begin Date End

Range of years:

G. Bennett Speeches Collection</title>

Basic Description Names & Subjects Notes Etc.

Level file Persistent ID ref15

Other Level

Title

Box 1, Folder 6: Address to Faculty, beginning of school year

Wrap in tag...

Date Expression

Date

Date Begin 1931 Date End 1932

Bulk Dates

Once you're done entering that folder, click the **Add Sibling** button below the big white box and repeat the process of adding a folder to AT.

When you're done adding folders for one box, click on Box 1 in the big white box to highlight it, and then click **Add Sibling**. Choose recordgrp from the Level menu, type in Box 2 in the Title box, and click save. Click on Box 2 in the big white box to highlight it, and then click Add Child to add a folder/item. Choose file/item from the Level menu, then type in the folder title, years, and click Add Sibling to add the next folder/item in the box.

Essentially, clicking **Add Child** puts something inside something else, like a box inside a series, or a folder inside a box. You only have to do this once per box. After you've added one folder/item to a box, you can click **Add Sibling** to add something on the same level, like folder 1, folder 2, folder 3, etc.

**Resources**

Title: Finnell, H.H. Collection

1975-001: Finnell, H.H. Collection

Series I: Correspondence and Publication:

- Box 1
- Box 3
- Box 4
  - Box 4, Folder 1: 1943-1944
  - Box 4, Folder 2: 1945
  - Box 4, Folder 3: 1946
  - Box 4, Folder 4: 1947
  - Box 4, Folder 5: 1948
  - Box 4, Folder 6: 1949
  - Box 4, Folder 7: 1950
  - Box 4, Folder 8: 1951-1952
  - Box 4, Folder 9: 1954
  - Box 4, Folder 10: 1955
  - Box 4, Folder 11: 1956-1957
- Box 5
- Box 6

Series II: Oversize Articles

Series III: Photographs

Basic Description

Level: collect

Other Level:

Title:

Box 1 is a child of Series I, so it was created by clicking **Add Child**.

These folders are all siblings of each other, so they were added by clicking **Add Sibling** after each folder was entered. Similarly, the boxes are all siblings, so after completing a box, you can click on Add Sibling after selecting the previous box to add the next one.

### But what if I make a mistake, and add a child instead of a sibling, or vice versa?

AT is pretty forgiving. If you catch your mistake as soon as you do it, you can click on the mistaken item in the big white box and click Delete Component. If you haven't entered anything, the item will be blank (it'll just have the grey dot next to it in the big white box),

If you notice a mistake later, you can drag items in the big white box to where you want them to go. Be patient, as this can be a bit tricky and take some finesse to get the item to go where it should.

Once you get done entering in the folders, you'll need to enter the notes. See the following sections for how to enter notes in AT.

## How to put notes in Archivists' Toolkit (AT)

### The Notes Etc. & Deaccessions Tab

The **Notes Etc. & Deaccessions tab** gets the following notes put in. Click the arrow next to the Add note etc. field to add notes.

The information that goes in the Note Content field can be copied over from the original finding aid in Word. The Note Label field's title corresponds to what section of the original finding aid you should copy over.

Select from Add note etc. menu:	Note Type	Put in the Note Label field	Put in the Note Content field
Arrangement note	Arrangement note	Arrangement	Arranged into one (two, three, etc) series.
Conditions Governing Access note	Conditions Governing Access note	Conditions Governing Access	Access to this collection is unrestricted. (unless there are restrictions noted on the original finding aid)
Conditions Governing Use note	Conditions Governing Use note	Conditions Governing Use	© 2013 Board of Regents for the Oklahoma Agricultural and Mechanical Colleges. All rights reserved. (unless there are other restrictions listed in the Usage Restrictions section of the finding aid)
Biographical/Historical note	Biographical/Historical note	Biographical Sketch (for a person or a collection about a person or group of people) <b>Or</b> Administrative History (if it's	Copy the information from the Biographical/Historical note in the



		an organization/department/any thing that's not a person)	original finding aid. If there is none, summarize the history of the organization or write a short biography of the person. If you have questions, see Sarah.
Scope and Contents note	Scope and Contents note	Scope and Contents	Copy the information from the Scope and Contents note in the original finding aid.  If there is none, summarize what's in the collection. For example: Collection contains photographs, correspondence from Jane Doe to John Smith, awards, medallions, etc.
Location note	Location note	Location	For current information on the location of these materials, please consult the Library's online catalog or contact the Special Collections and University Archives Reference staff.
<b>Select from Add note etc. menu:</b>	<b>Note Type</b>	<b>Put in the Note Label field</b>	<b>Put in the Note Content field</b>
Preferred Citation note	Preferred Citation note	Preferred Citation	[Identification of item], Collection

			<b>Title, Special Collections and University Archives, Oklahoma State University Libraries.</b> (Copy the information from the Preferred Citation section in the original finding aid. Make sure the collection name appears in the citation.)
Processing Information note	Processing Information note	Processing Information	<b>Processed by: Name, Date</b> (Copy the information from the Processing Information section in the original finding aid)
Immediate Source of Acquisition note	Immediate Source of Acquisition note	Provenance	<b>Gift of: Name, Date</b> (Copy the information from the Provenance section of the original finding aid.)
Related Archival Materials	Related Archival Materials	Related Archival Materials	Copy the information from the Related Archival Material section of the original finding aid. If none are listed, do not use this note

If any of these fields are empty in the original finding aid, then you do not need to put that note in AT.

Only put into AT the information listed here. There is more information on the original finding aid that does not go into AT.

### **The Finding Aid Data Tab**

In the **Finding Aid Data tab**, enter the following information. If the information is not present in the original finding aid, leave the corresponding field blank in AT.

**Finding Aid title:** Guide to the \_\_\_\_\_ (copy the information found at the top of the original finding aid)

**Finding Aid Subtitle:** Collection Number xxxx-xxx

**Author:** Copy the information found in the Processed by section and the Date Completed section on the first page of the original finding aid.

**Description Rules:** Choose Describing Archives...(dacs)

**Series:** Enter the list of series. Use Roman numerals for the Series numbers.

**Revision Date:** Enter the month and year of revision. This can be found in the Revision Date section on the first page of the original finding aid. If there's no Revision date, leave this blank.

**Revision Description:** Enter the name of the person who did the revision (found in the Revision Date section on the first page of the original finding aid). If there's no revision, leave this blank.

**Note:** If there are more than one Revisions listed, put the **most recent** revision in the **Revision date** field as follows: Most recently by (name); Month and year.

Then, in the Revision Description field, put the names and months and years of the other revisions.

**Finding Aid Status:** Completed

Leave the remaining fields blank.

### **Adding Arrangement notes to each Series**

You'll also need to add the arrangement for each series. To do so, click on the **series title** in the box list. Then, click on the **Notes Etc. tab**.

Choose **Arrangement** from the Add note etc. menu at the bottom of the screen.

In the **Note Label** field, type Arrangement.

In the **Note Content** field, copy and paste the Arrangement note that can be found under the series name in the original finding aid's box list.

Make sure you add an Arrangement note for each series in the collection.

**Note:** If there are no notes on how each series is arranged, look to see if you can figure out how it's arranged and put how it's arranged. For example: Arranged chronologically, Arranged by author, Arranged by subject. If you're not sure, come ask Sarah or Kate.

**One last thing:** on the **Basic Description tab**, make sure you enter the linear feet and the number of boxes in the collection. This information can be found in the Extent section of the original finding aid or in the Accession record in AT. The linear feet goes in the Extent number box. Then, in the Container Summary field, put in ( ) the number of and type of boxes. For example: (2 record storage boxes, 1 half size document box)

If there is no linear feet/# of and type of boxes in the original finding aid, you'll have to calculate the linear feet and find out how many boxes there are and what type of boxes they are and enter it. The chart for calculating linear feet is in the INV folder in the linear feet chart folder. If you're not sure how to calculate linear feet, come ask Sarah or Kate.

### **Downloading the PDF finding aid**

Once you've entered in **all** of the notes, including the Series Arrangement notes, and the fields in the Finding Aid Data tab, and put in the linear feet and container summary, you'll need to download the PDF of the finding aid.

Click the Reports button at the bottom of the screen (it's next to the close and save buttons). Choose **Finding Aid** from the **Select Report** menu. Make sure PDF file is chosen in the Select Output menu.

Click Save. Choose the collection's folder to save it to and name the file like this: Collection number Name of Collection DACS. For example: 1955-001 Oklahoma Power and Propulsion Laboratory DACS

Click Save again and AT will start downloading the PDF.

Once you've downloaded the PDF, make a note of the collection you've just completed and let Sarah know you've finished it.

**For an example of what all the notes should look like, look at 1955-001 or 2011-072.**