BROOKLYN HISTORICAL SOCIETY

ARCHIVISTS' TOOLKIT MANUAL

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Introduction: Setting Up a New Instance of the Archivists' Toolkit on Your Computer

1. Go to the Archivists' Toolkit website (http://www.archiviststoolkit.org) and download the AT onto your computer, following the installation instructions after you open the program.
2. When you first open your new instance of AT, you will be asked to enter a few bits of information that will allow you to connect to the MySQL database that contains all of BHS's AT data. Enter the following information into the text fields that open up:
   a. **Connection URL:** jdbc:mysql://bhs-app01:3306/BROOKLYN
   b. **Username:** admin
   c. **Password:** fulton00
   d. **Database Type:** choose MySQL from the drop-down menu
3. Once you do this, you should be able to log-in with your personal username and password. If you don't have a username and password, contact the library staff member who is assigned as the AT administrator.

Step 1. Entering Accession Information into the Archivists' Toolkit

- **BASIC ACCESSION INFORMATION**

   1. **PROGRAM LOG-IN:** Open the Archivists' Toolkit by double--clicking on the desktop icon and enter your user name and password when prompted.

   2. **OPENING THE ACCESSIONS MODULE:** Double-click on **Accessions** on the left navigation bar.

   3. **ENTERING A NEW RECORD:** To enter a new accession record into the database, click on **New Record** on the top navigation bar which will open up an accession record form in a new window
      o **NOTE:** Prior to the beginning of the survey, 2877 accession records (in various states of completion) were added to the database. **Before creating a new accession record, look up the accession number of the collection you are about to enter and see if it is already in the database.** Double-click on the accession number. This will open up the accession record form which will already be populated with the existing information. **In cases like this, you will be revising the existing accession record instead of creating a new one.**

   4. **ACCESSION NUMBER (required field):** In the **Accession Number** field on the upper right of the window, enter the collection's accession number. BHS accession numbers are formatted so that the accession year and sequential accession number are separated by a decimal point (example 1973.80). Enter the accession number into the fields by typing the first part of the number into the first box, and then the second part into the second box. AT will automatically populate the decimal point between the two numerals.

   5. **ACCESSION DATE (required field):** In the **Accession Date** field below **Accession Number**, enter the date on which the accession was approved by the Collections Committee. If the date of accession is unknown, use 1776/7/4 as a dummy number. The date should be formatted as year/month/day (example:

1776/7/4).

When creating an accession number prior to official approval by the Collection Committee, enter 1881/12/01 to indicate a temporary number to be changed later. Otherwise, enter the date it was accepted by the Collection Committee.

In the case of a purchase, enter the date on the receipt, invoice, or bill of sale.

6. **RESOURCE TYPE:** Open up the drop-down menu next to **Resource Type**. You will have three choices**: Collection**, **Papers**, or **Records**. Choose the appropriate resource type (DACS 2.3.18)
   - o **Records** should be used when the materials being described consist of three or more forms of documents that were created, assembled, accumulated, and/or maintained and used by a government agency or private organization such as a business or club.
   - o **Papers** should be used when the materials being described consist of three or more forms of documents that were created, assembled, accumulated, and/or maintained and used by a person or family.
   - o **Collection** should be used to describe an intentionally assembled collection.

7. **TITLE:** Beneath **Resource Type**, enter the DACS-compliant title of the collection (see DACS 2.3) into the **Title** field.

8. **EXTENT:** Below the **Title** field, enter the **Extent** of the collection (in linear feet) in the corresponding field. If you need assistance determining linear footage, consult the Beinecke Library's online linear footage calculator: http://bit.ly/8o2zOZ

9. **CONTAINER SUMMARY:** Under **Extent**, enter the number and type of containers in the **Container Summary** field (example: 5 document boxes, or 2 folders).

10. **DATE EXPRESSION:** In the **Date Expression** field on the upper left side of the window, enter the natural language expression of the date or date range of the materials in the accession (see DACS 2.4 to ensure correct formatting). For single year collections, the date expression field must always be populated with that year.

11. **DATE RANGE:** Under **Date Expression**, enter the beginning and end dates of the materials in the collection. If you've entered a circa date into the **Date Expression** field, enter the beginning and end dates that would correspond to that approximate range (for example, the beginning and end dates of circa 1870s would be 1870 and 1879). No matter whether the date(s) of a collection are a single year, or a span of years, the inclusive date fields **must always be populated.** For example, if the date of a collection is 1880, then the date expression, begin date, and end date must all be populated with 1880.

12. **BULK DATES:** Enter beginning and end bulk dates into their corresponding fields, if applicable.

13. **GENERAL ACCESSION NOTE:** The **General Accession Note** field can be used to record any other information that doesn't neatly fit in the more specifically defined fields.

Record the temporary location where the collection is stored prior to processing or during the accessioning process.

14. **SAVE YOUR WORK:** Click Save.

- **ADDING DONOR AND CREATOR NAMES TO AN ACCESSION**

    1. **OPENING THE NAMES AND SUBJECTS TAB:** Click on the **Names and Subjects** tab on the top of the accession record window.

    2. **CHECKING FOR EXISTING NAME HEADINGS:** Click on **Add Name Link** and look through the list of names that pops up in a new window to see if the one you want to add is already on the list.
        - If it is, highlight the name and click on the **Function** drop-down menu and select either **Source** for a donor or **Creator** for a creator.
        - After you do this, a second drop down menu, **Role**, will appear. For creators, you don't need to choose a role. For donors, scroll down through the list and choose **Donor**.
        - After choosing a **Function** and **Role**, click on **Link** and the name will be linked to the accession record.

    3. **CREATING A NEW NAME HEADING:**

        - If the name you want to add is not on the list, you can create a new name by clicking on **Create Name.**
        - You will be prompted to select the type of name you want to create (**Person, Corporate Body, or Family**). Use the drop-down menu to make your selection.
        - Once you make your selection, a new data entry box will pop up with the **Details** tab highlighted.
        - For personal names, fill out the **Primary Name** (i.e. surname), **Rest of Name** (i.e. first and middle) as well as any other applicable options such as prefix, title, suffix, number, qualifier or fuller form.
        - For corporate names, fill in the **Primary Name**, and **Subordinate elements**, **Qualifiers**, or **Numbers** that apply
            o A subordinate element is an organizational unit within the corporate body specified in the Primary Name field. For example, "New York (N.Y.). Dept. of Health. Office of Vital Statistics would be entered into AT with New York (N.Y.) in the Primary Name field, Dept. of Health in the **Subordinate 1** field, and Office of Vital Statistics in the **Subordinate 2** field.
            o The **Number** field is used for names in which a specific session or meeting of an organization is specified in the corporate name heading. For example, "United States Congress, 97th, 2nd Session" would be entered into AT with United States Congress in the Primary Name field and 97th, 2nd Session in the **Number** field.
            o The **Qualifier** field is used to enter a term or phrase that distinguishes a name from another of the same form. For example, "Court of Appeals. (2nd Circuit)" would be entered into AT with Court of Appeals in the Primary Name field and 2nd Circuit in the **Qualifier** field.

- Fill out the **Rules** and **Source** boxes: use NACO for Source if you find the name in the name authority file, or Local if it's a non-NACO heading. Use DACS for Rules.
- Click **OK** which should put you back into the **Name Lookup** box.
- Click on the **Function** drop-down menu and select function and role, as described earlier
- Click **Link** and the name should be added to the collection.

4. **SAVE YOUR WORK:** Click Save.

- **ADDING ACCESSION NOTES**

  1. **OPENING THE ACCESSIONS NOTE TAB:** Click on the **Accessions Notes** tab. Doing this will open up a new interface.

  2. **ACQUISITION TYPE:** At the top left, click on the **Acquisition Type** drop-down menu and choose the descriptor that best fits the information regarding the type of acquisition as detailed in the paper accession record. If you are unable to determine the acquisition type, choose the question mark icon.

  3. **DESCRIPTION:** In the **Description** field, record a general description of the document types and topical content of the accession, as detailed in the accession record.

  4. **INVENTORY:** In the **Inventory** field, record a list of the containers and their contents that make up the accession (if this information is available in the paper accession record). Record information into this field only if there is an existing inventory in the paper accession record.

  5. **SAVE YOUR WORK:** Click Save.

- **ADDING ACKNOWLEDGEMENT, RESTRICTION, AND PROCESSING TASK INFORMATION**

  1. **OPENING THE ACKNOWLEDGEMENTS, RESTRICTIONS AND PROCESSING TASKS TAB:** Click on the Acknowledgements, Restrictions, and Processing Tasks tab. Doing this will open up a new interface.

  2. **ACKNOWLEDGEMENTS:** Under **Acknowledgements and Restrictions**, check off all acknowledgement items that apply, according to the information you find in the paper accession record.

  3. **ACCESS RESTRICTIONS:** In the **Access Restrictions** field, write "Open to users without restriction" unless otherwise specified in the accession record, or by Matthew or Chela. Generally speaking, all archival collections at BHS are accessible to researchers without restriction.

  4. **USE RESTRICTIONS:** The **Use Restrictions** field should primarily be used to identify any restrictions on reproduction due to copyright or other reasons, as well as restrictions on further use of the materials being described, such as publication, after access has been granted. If conditions governing use and reproduction are

clearly spelled out in the paper accession record, copy this information verbatim into the field. **DACS 4.4** provides some general guidelines for how use restrictions should be articulated:

- ▪ **DACS 4.4.7 -** Where possible and appropriate, combine the statements pertaining to copyright status, reproduction, publication or use in the most efficient way. Example: *Unpublished manuscripts are protected by copyright. Permission to publish, quote, or reproduce must be secured from the repository and the copyright holder.*
- ▪ **DACS 4.4.8 -** If the details of the copyright status of the materials being described are unknown, unclear, or complex, make a general statement about possible copyright restrictions. Example: *Copyright restrictions may apply.*
- ▪ **DACS 4.4.9 -** If the materials being described are protected by copyright, indicate the copyright owner, when the copyright restrictions will expire, and contact information for the copyright owner or the owner's agent, if known. Example: *Copyright retained by the owner during her lifetime, at which point it will revert to the Brooklyn Historical Society.*
- ▪ **DACS 4.4.10 -** If the term of copyright has expired, indicate that the material being described is no longer subject to copyright restrictions. Example: *Material in this collection is in the public domain.*

5. **PROCESSING PRIORITY:** The **Processing Priority** field should be filled in after the survey of a collection is complete and you commence cataloging and describing the collection. Click on the drop-down menu next to **Processing Priority** and choose the appropriate descriptor. Processing priority will largely be based on the Research Value, Physical Access and Intellectual Access ratings applied to the collection. If you have any questions as to the level of priority that should be attributed to a collection, consult with Matthew or Chela.

6. **SAVE YOUR WORK:** Click Save.

Step 2. Entering Survey Information into Archivists' Toolkit (*optional*)

NOTE: *During the 2009/2010 CLIR Hidden Collections project, the Archival Processing Team completed a survey using the following protocol. This is not necessary for all collections. However, in the case where a more formal assessment has been completed, these steps should be followed for consistency.*

- • **ADDING A NEW SURVEY RECORD**

  1. **OPENING THE ASSESSMENT RECORDS MODULE:** In the main AT window, click on **Tools** on the main menu at the top. From the drop-down menu that opens up, choose **Assessment Records**. This will open up a new window.

  2. **ADDING A NEW ASSESSMENT RECORD:** From the main **Assessment Records** window, click the **Add Record** button on the bottom task bar. This will

open up a **Basic Information** window similar to the one you started with to create accession records.

3. **LINKING AN ACCESSION RECORD TO AN ASSESSMENT RECORD:** On the **Basic Information** screen, click on **Link Accession**. This will open up a new window with a list of all the accession records that have already been entered into AT. Double-click on the accession number of the collection you are surveying. Now the accession record and the survey record that you are about to create for the collection will be linked to each other.

4. **SAVE YOUR WORK:** Click Save.

- **RECORDING SURVEY DATA**

    1. **OPENING THE SURVEY TAB:** At the top of the Assessments main window, click on the **Survey** tab.

    2. **RECORDING SURVEY RATINGS:** In the upper left of the window, record the numerical ratings for each survey category that you and your survey partner agree on.

    3. **GENERAL NOTE:** The **General Note** tab can be used to take notes for processing and description purposes (i.e. notes on the topics and dates covered by the collection, scope and content, etc).

    4. **CONSERVATION ISSUES:** Under **Special Conservation Issues** and **Other Conservation Issues** check off any boxes that apply to the collection you are surveying. In the Conservation Note field, you can elaborate on any issues that warrant further explanation, or note any conservation issues that aren't covered by the listed categories.

    5. **SPECIAL FORMATS AND VALUES:** Click on the **Special Formats and Values** tab. Under Special Formats, check off any format categories that apply to materials in the collection. **The Special Formats Note** field can be used to describe any formats that aren't covered by the listed categories, or to elaborate on any issues that warrant further explanation.

    6. **SAVE YOUR WORK:** Click Save.

Step 3. Entering Collection and Series Level Descriptive Information into AT (RESOURCES MODULE)

- **LINKING AN ACCESSION RECORD TO A RESOURCE RECORD**

    1. Re-open the **Accessions module** from the AT main window and open up the accession record for the collection you want to work with.

    2. Click on the **Link Resource** button. Doing this will open up a look-up list of resource records (AT's term for descriptive documents) in a new window. Click on

the **Create Resource** button on the bottom of the window. Doing this will open up a resource record entry form in a new window.

- **ENTERING BASIC DESCRIPTIVE INFORMATION**

  1. **INFORMATION CARRIED OVER FROM THE ACCESSION RECORD:** As you will see, the **Basic Description** portion of the resource record is already populated with much of the basic descriptive information that had previously been entered into the accession record (including **Title**, **Dates**, **Extent**, and **Container Summary**).

  2. **LEVEL:** At the top of the form, open up the **Level** drop-down menu and select **Collection**.

  3. **LANGUAGE:** Select the appropriate language (see DACS 4.5) from the **Language** drop-down menu. Always choose the language that is the most prevalent in the collection.

  4. **RESOURCE IDENTIFIER:** Enter the **Resource Identifier** into its corresponding field. For collections that are comprised of a single accession, use the existing accession number. For collections that combine more than one accession, use a sequential ARC number.

  5. **SAVE YOUR WORK:** Click Save.

- **ADDING SUBJECT HEADINGS**

  1. **OPENING THE NAMES AND SUBJECTS TAB:** Click on the **Names and Subjects** tab at the top of the resource record entry form.

  2. **ADDING AN EXISTING SUBJECT HEADING:** Click on the **Add Subject** button and look through the list of subject headings that pops up in a new window to see if the one you want to add is already on the list.
     - If it is, highlight the subject heading and click on the **Link** button. The heading will then be added to the resource record and you can click the **Close Window** button.

  3. **CREATING A NEW SUBJECT HEADING:**
     - Enter the subject term (including any subdivisions) into the **Subject Term** field.
     - Choose what type of subject term it is by clicking on the **Type** drop-down menu.
     - Specify the source from which you obtained the heading from the **Source** drop-down menu. This will most likely be Library of Congress Authorities (for geographical or topical headings) or Art and Architecture Thesaurus (for genre/form headings).
     - Click **OK**
     - Double-click on the subject term you just created to link it to your collection.
     - Click **Save.**

  4. **SUBDIVIDING SUBJECT TERMS IN AT**

- Normally, when a subject term is subdivided, the subdivisions are separated with double dashes (example: Modern dance -- New York (State) -- New York). **To ensure the proper mapping of subject terms to the cataloging utilities to which we will be outputting MARC XML files, subdivisions must be separated with specific subfield codes depending on the type of subdivision.** Below, you will see a table listing the different types of subdivisions, the subfield codes that must be used to denote each type of subdivision, and examples of each type of subdivision. Below the table are instructions for properly formatting subject headings that utilize subdivisions.

Types of Subdivisions and Subfield Codes

Type of Subdivision	Subfield Code	Examples
Topical terms as subdivisions	|x	Politics and government Study and teaching Social aspects Labor unions History and criticism
Geographical subdivisions	|z	New York (State) New York United States Kings County
Chronological subdivisions	|y	18th century 20th century 1945-1960 To 1900
Form subdivisions	|v	Exhibitions Correspondence Selections Collections Periodicals Reviews

Format for Coding Subdivisions in Subject Headings

1. Replace any double dashes ("--") with the appropriate subfield code for the type of subdivision. To be formatted correctly, the proper subdivision code should precede its corresponding subdivision.
2. Precede the subfield code with a vertical bar symbol (SHIFT + backslash).
3. Enter a single space before and after the subdivision code.
4. Example: "Minstrel shows -- United States -- History -- 19th Century" would be entered into AT as "Minstrel shows |z United States |x History |y 19th Century"

- **ADDING NAME HEADINGS**

  1. **OPENING THE NAMES AND SUBJECTS TAB:** Click on the **Names and Subjects** tab at the top of the resource record entry form.

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2. <u>**ADDING AN EXISTING NAME HEADING:**</u> Click on **Add Name Link** and look through the list of names that pops up in a new window to see if the one you want to add is already on the list.
    - If it is, highlight the name and click on the Function drop-down menu and select either **Source** for a donor, **Creator** for a creator, or **Subject** for a name used as a topical heading. After you do this, a second drop down menu, **Role**, will appear. For creators, you don't need to choose a role. For donors, scroll down through the list and choose **Donor**. Don't bother choosing a role for subjects.
    - After choosing a **Function** and **Role**, click on **Link** and the name will be linked to the accession record.

3. <u>**CREATING A NEW NAME HEADING**</u>
    - After clicking on the **Add Name** button, click on the **Create Name** button. You will be prompted to select the type of name you want to create (person, corporate body, or family). Use the drop-down menu to make your selection.
    - Once you make your selection, a new data entry box will pop up with the **Details** tab highlighted.
    - For personal names, fill out the **Primary Name** (i.e. surname), **Rest of Name** (i.e. first and middle) as well as any other applicable options such as prefix, title, suffix, number, qualifier or fuller form.
    - For corporate names, fill in the **Primary Name**, and Subordinate elements, **Qualifiers**, or **Numbers** that apply
        - A **Subordinate Element** is an organizational unit within the corporate body specified in the **Primary Name** field. For example, "New York (N.Y.). Dept. of Health. Office of Vital Statistics would be entered into AT with New York (N.Y.) in the Primary Name field, Dept. of Health in the **Subordinate 1** field, and Office of Vital Statistics in the **Subordinate 2** field.
        - The **Number** field is used for names in which a specific session or meeting of an organization is specified in the corporate name heading. For example, "United States Congress, 97th, 2nd Session" would be entered into AT with United States Congress in the Primary Name field and 97th, 2nd Session in the **Number** field.
        - The **Qualifier** field is used to enter a term or phrase that distinguishes a name from another of the same form. For example, "Court of Appeals. (2nd Circuit)" would be entered into AT with Court of Appeals in the Primary Name field and 2nd Circuit in the Qualifier field.
    - Fill out the **Rules** and **Source** boxes: use NACO for **Source** if you find the name in the name authority file, or **Local** if it's a non-NACO heading. Use DACS for Rules.
    - Click **OK** which should put you back into the **Name Lookup** box.
    - Click on **Function** drop-down menu and select function and role, as described earlier.
    - Click **Link** and the name should be added to the collection.

4. <u>**SAVE YOUR WORK:**</u> Click Save.

- **ADDING NOTES:**

1. **OPENING THE NOTES TAB:** Click on the **Notes Etc. and Deaccessions** tab at the top of the form and then on the **Add Note etc.** drop-down menu to select the applicable note.

2. **CREATING A NOTE:** Type or paste the text of the note into the text box that pops up. When you are finished typing the note, click **OK**.

3. **PROOFREADING:** AT provides **no spelling or grammar check**, so it is a good idea to either write the text of the note in MS Word and then paste it into the appropriate text box after proofreading, or write the note into the text box, copy and paste the text into MS Word to proofread, and then re-paste the corrected text back into the notes field.

4. **SAVE YOUR WORK**: Click **OK** which will close the note text box. Then click Save in the main resource record screen.

   - **YOU MUST WRITE NOTES FOR:**
     - **Conditions Governing Access** (AT will automatically populate "Open to users without restriction" into the note field)
     - **Conditions Governing Use**
     - **Preferred Citation** (AT will automatically populate the preferred citation format into the note field)
     - **Scope and Content note**
     - **Processing** (include "Minimally processed to the {collection, series or folder} level)
     - **Language of Materials** (only if more than one language is in a collection— AT does not allow you to add multiple languages in the "Basic Description form)
     - **Abstract** (maximum of 1,950 characters for MARC export)
     - **Biographical/Historical note**
     - **Separated Material** (if separated material exists)

- **ADDING FINDING AID INFORMATION.**

  1. **OPENING THE FINDING AID INFORMATION TAB:** Click on the **Finding Aid Data** tab at the top of the form.

  2. **REQUIRED FIELDS:**
     - Type in an **EAD FA Unique Identifier** which will be the accession number or the ARC number.
     - **EAD FA Location** will be left blank. We will fill this out WHEN the finding aids are made available on the web.
     - **Finding Aid Title**: Enter "Guide to the (collection name goes here)"
     - **Finding Aid Date:** The date you finished working with the finding aid (Year,
     - Month, Day: xxxx.xx.xx)
     - **Author:** The full name of the person(s) who wrote the finding aid.
     - **Description Rules:** DACS.
     - **Language of the Finding Aid:** Finding aid written in English
     - **Sponsor Note:** The sponsor note should be created in collaboration with or approved by the Development Department to ensure the funder's name is

captured according to their preference. The project name which was funded may also be included. Example: *"This collection was processed and described as part of the project, 'Uncovering the Secrets of Brooklyn's 19th Century Past: Creation to Consolidation,' funded by the Council on Library and Information Resources."*

- **Edition Statement:** Leave blank.
- **Series:** Leave blank.
- **Revision Date:** Leave blank as we are working with unprocessed collections.
- **Revision Description:** Leave blank as we are working with unprocessed collections.
- **Finding Aid Status:** Click on drop-down menu and select "For Supervisor Review." Matthew/Chela will change to "Completed" once reviewed.
- **Finding Aid Note:** Leave blank, generally speaking, unless there is something critical that needs to be addressed.

3. **SAVE YOUR WORK:** Click Save.

- **ADDING SERIES INFORMATION**

  1. **ADDING A NEW SERIES:** Click **Add Child** button and a new **Basic Description** data entry screen will pop up. Click on the **Level** drop-down menu and select **Series**.

  2. **TITLING THE SERIES:** In the **Title** field, type in the title of your series.

  3. **DATES:** In the **Date** field, type your date in the most appropriate of the following:
     - **Date Expression** is for a phrase, such as circa 1900.
     - **Date Begin** and **Date End** fields are for inclusive date spans: This is probably the most common format for series dates.
     - **Bulk dates** may be used, if relevant.

  4. **EXTENT:** In the extent field, add the extent for the series in linear feet

  5. **SCOPE AND CONTENTS NOTE:**
     - Click on the **Notes, etc.** tab and choose **Scope and Contents note** from the drop down menu at the bottom of the screen labeled **Notes, etc.**
     - Enter the text of your note in the text box that opens.
     - Click **OK** which will close the text box. Then click **Save** in the main resource record screen.

  6. **ADDING ADDITIONAL SERIES:** Click **Add Sibling** and follow steps 2-5. Continue this process until all your series are added.

  7. **SAVE YOUR WORK:** Click Save

- **ADDING SUBSERIES INFORMATION**

  ➢ **ADDING A NEW SUBSERIES:** To add a subseries, follow the same steps as above, simply applying them to the series level rather than the collection level:
     - Click on the series to which you want to add a subseries.

- Click on "Add Child" button and a new "Basic Information" screen will pop up.
- Follow the **ADDING A NEW SERIES** instructions 2 and 3.

- **ADDING FILES**

  1. **ADDING A NEW FILE:** Click **Add Child** button and a new **Basic Description** data entry screen will pop up. Click on the **Level** drop-down menu and select **File**.

  2. **TITLING THE FILE:** In the **Title** field, type in the title of your file.

  3. **DATES:** In the **Date** field, type your date in the most appropriate of the following:
     - **Date Expression** is for a phrase, such as circa 1900.
     - **Date Begin** and **Date End** fields are for inclusive date spans: This is probably the most common format for series dates.
     - **Bulk dates** may be used, if relevant.

- **ADDING INSTANCES**

  - **Note:** This where you can add the physical location of the material within the collection and it can be done at any level of the collection:
    1. Click on the series to which you want to add an instance.
    2. On the right side of the **Basic Description** form, you will see a box titled **Instances**.
    3. Click on **Add Instance**.
    4. A box will pop up that asks, **"What type of Instance would you like to create?"**
    5. Click on the drop-down menu and select the type of material contained within your series
    6. Click OK.
    7. A new data entry box will automatically pop up called **Analog Instance.**
    8. **Container 1 Type:** Select how the material is housed (In boxes, drawers, map cases, etc.)
    9. **Container 1 Indicator:** This will usually be **Box.**
    10. **Container 2 Type:** This will usually be **Folder.**
    11. **Container 2 Indicator:** This is a number OR numbers, identifying the folder, etc.)
    12. Click **OK**
    13. Continue until all of your intellectual material is connected to a physical location.
    14. Click **Save.**

- **EXPORTING EAD AND MARC XML RECORDS**

  - Exporting EAD XML records
    1. Open up the resource record for which you'd like to export an EAD record.
    2. Right underneath the instances field in the bottom left, look for the button labeled **Export EAD**, and click on that button.
       3. In the next window that opens, choose the location where you want to save your file, and enter the file name for your EAD record. Please consult the instructions for uploading EAD records to the NYU finding aid portal, which outlines BHS's preferred file-naming

conventions for both EAD and MARC records (located in
S:\LIBRARY & ARCHIVES\Cataloging-Description-
Processing\Archives description and processing\Manuals,
procedures, templates).
4. Before clicking **Save**, click on the check box labeled **Suppress components and notes when marked "internal only."** Doing this will ensure that any parts of the finding aid that you don't want made readable to the public will not be populated in the EAD record.
5. Click **Save.**

➢ Exporting MARC XML records
   1. Open up the resource record for which you'd like to export an EAD record.
   2. Right underneath the instances field in the bottom left, look for the button labeled **Export MARC**, and click on that button.
         3. In the next window that opens, choose the location where you want to save your file, and enter the file name for your MARC record. Please consult the instructions for uploading EAD records to the NYU finding aid portal and use these same file-naming conventions when naming your MARC record (located in S:\LIBRARY & ARCHIVES\Cataloging-Description-Processing\Archives description and processing\Manuals, procedures, templates).
   4. Before clicking **Save**, click on the check box labeled **Withhold data marked "internal only."** Doing this will ensure that any parts of the finding aid that you don't want made readable to the public will not be populated in the MARC record.
   5. Click **Save.**

Appendix A - How to import a box-folder inventory into an existing AT resource

Large collections often feature hundreds or thousands of files, and manually adding the files into an AT resource record can be exceedingly time consuming. If an inventory of the files already exists, it can fairly easily be imported into Archivist Toolkit.

This document contains instructions for importing a box-folder inventory spreadsheet into an existing Archivist Toolkit resource record. The basic steps are outlined below:

1.   Export existing AT resource record as an EAD document
2.   Convert the box-folder inventory spreadsheet into CSV
3.   Convert the CSV into EAD
4.   Insert the inventory EAD into the collection level EAD
5.   Import the complete EAD back into AT
6.   Proofread the new AT resource record and delete the original resource
7.   Enter location information

Step 1 – Export existing AT resource record as an EAD document
First you need to export the existing resource record from AT into EAD. All you need to do is click on the "Export EAD" button from the resource record.

Step 2 – Convert the box-folder inventory spreadsheet into CSV

Now you need to convert your box-folder inventory into a CSV. Your inventory needs to include (at a minimum) the following fields (separated into individual columns):

1. Box
2. Folder
3. Title
4. Date(s)

You can also include anything other field which you might think is relevant (Scope and content, general note, restrictions, subject headings, etc.). You can also upload series and subseries level information via spreadsheet, however, it's usually simpler to add this manually to the AT resource record. For the purposes of this guide we will assume that you are not using the spreadsheet to import series or subseries level information.

You should use the CSV import template spreadsheet (inventory_import_template.csv), which can be found in: S:\LIBRARY & ARCHIVES\Cataloging-Description-Processing\Archives description and processing\Archivists' Toolkit

Delete the sample data from the CSV import template and paste the data from your inventory into the corresponding column (e.g. folder titles will be pasted under the "file title" heading). Feel free to delete columns which you do not plan on using, or simply leave them blank. If you have multiple series and/or subseries you may want to save each section individually as separate CSVs, which will make copying the inventories into the collection EAD simpler.

Once you have copied all of your data into the CSV import template, save the file using the collection's resource ID (e.g. accession or ARC number), making sure not to overwrite the template.

Step 3 – Convert the CSV into EAD
The CSV inventory needs to be converted into EAD. There are several web applications which can automatically convert them for you. I recommend using Steady (http://steady2.herokuapp.com/). Once converted you should have a new XML file containing the EAD inventory. Repeat this process for each series/subseries inventory, saving each set as separate files.

Step 4 – Insert the inventory EAD into the collection level EAD
Before importing the inventory into the collection level EAD, you will need to clean up the EAD inventory. First, open the inventory in Notepad and delete all the header information (i.e. everything that is not part of the actual inventory). You also need to make sure the inventories are at the correct "LEVEL" (e.g. <c01> <c02> etc.). The default level for converted inventories is <c01>. Series level inventories should be converted to <c02>, subseries level inventories should be converted to <c03>, etc. You can easily do this by using Notepad's find and replace function.

Now open the collection level EAD in an XML editor (such as oXygen). The inventory EAD should be inserted in the relevant series/subseries after the <scopecontent> note. At the series level, the EAD will look like this:

<c01 id="Laws" level="series">
        <did>
            <unittitle>Laws</unittitle>

```
            <langmaterial>
               <language langcode="eng"/>
            </langmaterial>
            <physdesc>
               <extent>0.5 linear feet</extent>
               <extent>in 1 manuscript box</extent>
            </physdesc>
            <unitdate normal="1867/1898" type="inclusive">1867-1898</unitdate>
         </did>
         <arrangement>
            <head>Arrangement note</head>
            <p>The series is arranged chronologically by year and then alphabetically by
folder title.</p>
         </arrangement>
         <scopecontent>
            <head>Scope and Contents</head>
            <p>The series primarily consists of various records related to laws, acts,
resolutions, and other regulations enacted or proposed by or to the Common Council of the
City of Brooklyn (after 1897, the City of New York). The files span the years 1869 to 1898.
Subjects include sewers, street openings, water supply, railroads, and civil service. Of
particular note is one file related to improvements in Brooklyn Heights (1895).</p>
         </scopecontent>
<c02 level="file"><did><unittitle>Act in relation to sewerage and
drainage</unittitle><unitdate>1867</unitdate><container
type="box">231</container><container type="folder">1</container></did></c02>
<c02 level="file"><did><unittitle>Act to authorize the extending of certain streets to the East
River</unittitle><unitdate>1867</unitdate><container
type="box">231</container><containertype="folder">2</container></did></c02>
</c01>
----
```

Repeat this process for each series/subseries. XML editors such as oXygen should
automatically validate the EAD for you and will let you know if you've made any mistakes
pasting the inventories into the collection level EAD.

Step 5 – Import the complete EAD back into AT
Now you're ready to import the EAD back into Archivist Toolkit. Open AT, click Import (located
in the top left corner of the screen, next to File), and then click Import EAD. Select your new
EAD file and then click Import.

You will now have two resource records for your collection, the original and the new record
which includes the file inventory.

Step 6 – Proofread the new AT resource record and delete the original resource
Importing the new EAD into Archivist Toolkit does slightly alter the resource record. Date
expressions at the collection and series level will need to be corrected if you are using bulk
dates. Also, container summaries will be imported as "General physical descriptions" notes
(which work the same as keeping the information in the container summary field, so there is
no need to change this). Compare the new resource record to the original record to see if
anything else has been altered by the export/import process. Finally, you may have noticed
that the Resource Identifier number has been changed.

The original Resource ID should look like this:

Resource Identifier	2013	015	
Accessions linked to this Resource ID:			

The new one will look like this:

Resource Identifier	2013.015		
Accessions linked to this Resource ID:			

This is why AT is allowing duplicate resource records in the system. Once you have determined that the new record is accurate and good to go, you should delete the original record. Once you have deleted the original record, change the new Resource Identifier back to the original ID.

Step 7 – Enter location information
The last step in this process is adding the location information for the new files. Please follow the instructions for "Adding Instances" in the BHS Archivist Toolkit manual.