

Creating/Updating Finding Aids in ArchivesSpace

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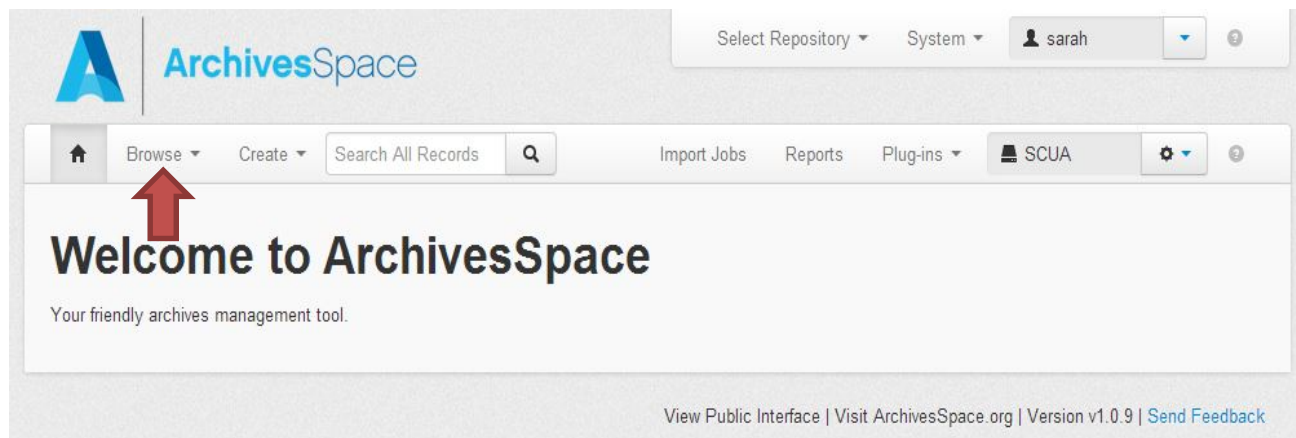
Opening the Resource Record

Go to ArchivesSpace (AS) by opening up your internet browser of choice and clicking on the ArchivesSpace bookmark. If there is no bookmark, go to <http://archivespaces.library.okstate.edu:8080>

You'll see a screen that looks like this:



Click the **Sign In** button in the top right corner, and enter your username and password. Once you're signed in, you'll see a screen that looks something like this (you may have less buttons visible depending on your access level in AS):



Click the **Browse** button on the upper left corner (see red arrow, above), and choose **Resources** from the dropdown menu. The list of Resources (Resources [or Resource records] are our finding aids) will appear. The Resources list has some things you should be aware of (see the screenshot on the next page for a visual aid to this list):

- 1) **Do not click the Show Components toggle box** (orange box below). It will bring up every folder, box, series, etc. in every collection in the Resources list, and you will be overwhelmed with information.

- 2) The **Filter by Text** box (green box below) is where you can search for a collection number, a name, anything you want. The filter will give you a results list that will show all Resources that match that term.
- 3) Clicking on a subject heading in the **Subject** list (blue arrow below) will take you to a result list that shows all Resources that have that subject heading linked to it.
- 4) The Resources list has the collection title, the collection number (which is the Identifier column), the finding aid status, the date the Resources record was created and edited, and finally, a view/edit column.
- 5) You can also sort the results by choosing a sort value from the **Sort by** dropdown menu (purple arrow below). You can sort by Title, Created date, Modified date, Identifier, and Finding Aid Status.
- 6) At the bottom of the screen, you will see a list of page numbers that you can click to advance to that page in the Resources list (not shown in screenshot).

The screenshot shows the SCUA Resources interface. At the top, there is a navigation bar with 'Home / Resources', a search bar, and various menu items. Below the navigation bar, there is a 'Show Components' checkbox (highlighted with an orange box) and a 'Filter by text' search box (highlighted with a green box). To the left of the main content area is a 'Subject' list (highlighted with a blue arrow) containing various subject headings with associated counts. To the right of the subject list is a 'Sort by' dropdown menu (highlighted with a purple arrow) with a 'Select' button. The main content area displays a table of Resources with columns for Title, Identifier, Finding Aid Status, and creation/modification dates. The table lists three resources: Otto M. Forkert Collection, Angelo Cyrus Scott Papers, and Oklahoma Power & Propulsion Laboratory Records. Each resource has a 'View' and 'Edit' button in the last column.

Title	Identifier	Finding Aid Status	Created by admin	Last Modified by admin	View Edit
Otto M. Forkert Collection	1951-001	Completed	2014-08-04 14:14:49 -0500	2014-08-04 14:14:49 -0500	View Edit
Angelo Cyrus Scott Papers	1955-001	Completed	2014-08-04 14:16:07 -0500	2014-08-04 14:16:07 -0500	View Edit
Oklahoma Power & Propulsion Laboratory Records	1955-002	Completed	2014-08-04 14:17:27 -0500	2014-08-04 14:17:27 -0500	View Edit

Once you have found the collection you need to enter a finding aid for, click its blue **Edit** button in the last column of the Resources list. The Resource record will open.

The Resource record will look like this when you first open it (there's more if you scroll down, but we'll look at the bottom of the record later):

The screenshot shows the AS interface for editing a resource. At the top, the breadcrumb trail is 'Home / Resources / Testing testing testing / Edit'. Below this, there are navigation buttons: 'Add Child', 'Paste', and 'Rapid Data Entry'. A red arrow points to the 'Add Child' button. To the right of these buttons is a 'Close Record' button. Below the navigation bar, there is a blue bar with the text 'Testing testing testing' and 'Collection'. The main content area is divided into two sections: 'Basic Information' and 'Dates'. The 'Basic Information' section contains the following fields: 'Title' (with the value 'Testing testing testing'), 'Identifier' (with the value '2014-067'), 'Level of Description' (with the value 'Collection'), 'Resource Type' (with the value 'Collection'), 'Language' (with the value 'English'), 'Publish?' (checked), 'Restrictions?' (unchecked), and 'Repository Processing Note'. The 'Dates' section has an 'Add Date' button. A 'Save Resource' button is located at the bottom left of the 'Basic Information' section.

Remember, depending on your level of access within AS, you may have less buttons visible.

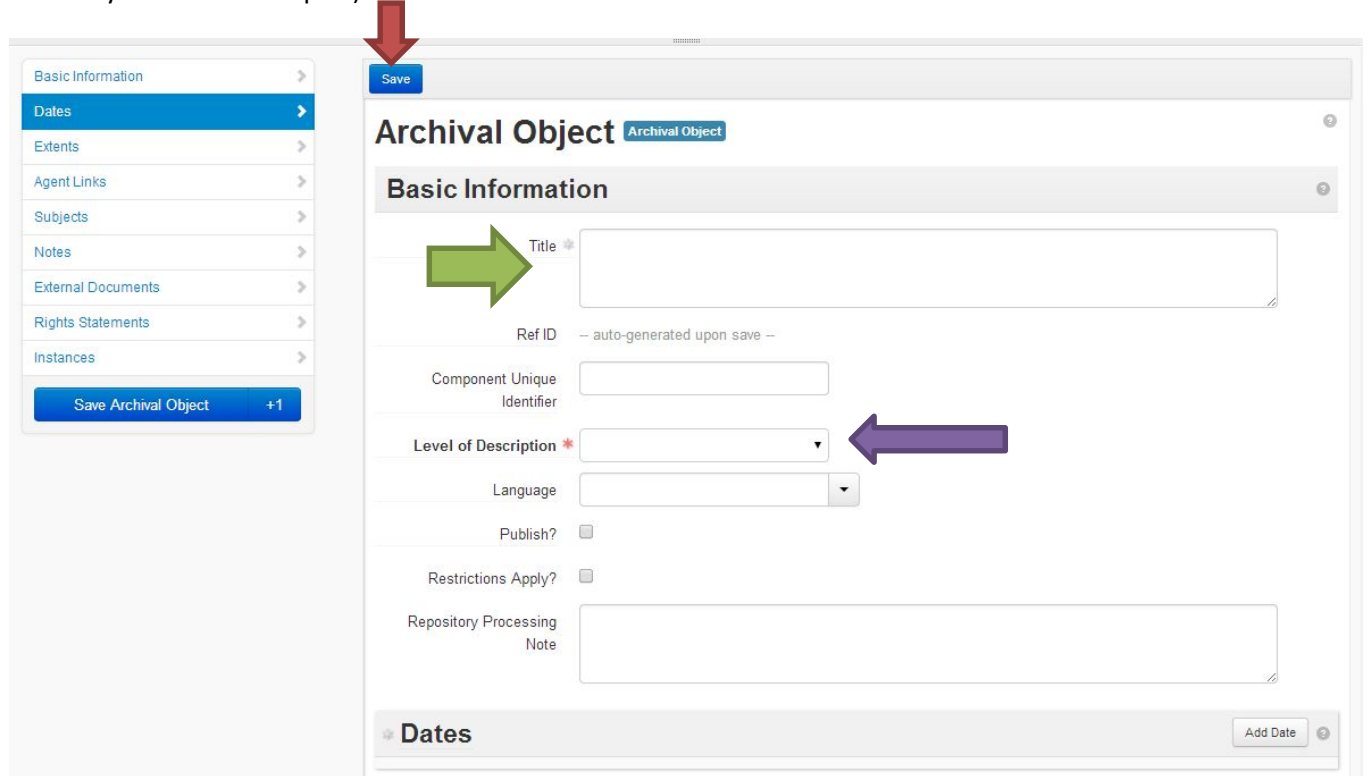
How to Enter a Finding Aid

If you're starting from scratch (as in nothing's ever been entered for the finding aid)

Open the finding aid, and click on the Collection Title line in the grey box at the top of the screen.

Click the **Add Child** button (see red arrow in above screenshot) and wait until the blue Loading box disappears.

A screen that looks like this will appear (again, there are more options if you scroll down, but you won't need any of that for this part):



The screenshot shows a web interface for creating an Archival Object. On the left is a sidebar menu with options: Basic Information, Dates, Extents, Agent Links, Subjects, Notes, External Documents, Rights Statements, and Instances. A blue button at the bottom of the sidebar says "Save Archival Object +1". At the top of the main form area is a blue "Save" button. The main form is titled "Archival Object" and has a sub-section "Basic Information". The "Basic Information" section contains several fields: "Title" (with a green arrow pointing to it), "Ref ID" (with the text "-- auto-generated upon save --"), "Component Unique Identifier", "Level of Description" (a dropdown menu with a purple arrow pointing to it), "Language" (a dropdown menu), "Publish?" (checkbox), "Restrictions Apply?" (checkbox), and "Repository Processing Note" (text area). Below the "Basic Information" section is a "Dates" section with an "Add Date" button.

Type Series # [use Roman numerals, e.g. I, II, III, IV]: [Series Title] in the **Title** box (green arrow above).

Choose **Series** from the **Level of Description** dropdown menu (purple arrow above).

Click the blue **Save** button (red arrow above).

Your screen should now look like this:

home / Resources / Testing testing testing

Testing testing testing

- Series I: Papers

Collection

Series

Basic Information

Edit

Add Event Suppress Delete

Series I: Papers Archival Object

Basic Information

Title Series I: Papers

Ref ID 8766f7a7649dbd9dc4952856e4f9c903

Level of Description Series

Publish? False

Has Unpublished Ancestor? False

Restrictions Apply? False

Created by sarah 2014-08-07 09:46:29 -0500, Last Modified by sarah 2014-08-07 09:46:29 -0500

Notice that in the grey box at the top of the screen your new series has appeared under the collection title.

Click the blue **Edit** button (see green arrow in the above screenshot). Wait for the blue loading box to disappear. Your screen will now look like this (except you won't have a box listed under the series yet):

Home / Resources / Testing testing testing / Edit

Add Child Add Sibling Cut Paste Move Transfer Rapid Data Entry

Testing testing testing

- Series I: Papers
- Box 1

Collection

Series

Record Group

Basic Information

Dates

Extents

Agent Links

Save

Add Event S

Series I: Papers Archival Object

Basic Information

If the Series I: [Series Title] line in the grey box at the top of the screen is not highlighted blue, click on it to highlight it blue (blue arrow above).

Once that Series line is blue, click the **Add Child** button (red arrow above). Wait for the blue loading box to disappear.

You'll get another screen that looks just like the screen from where you entered your series title. It will look like this (except it will say Archival Object instead of Box 1):

Testing testing testing

Series I: Papers

Box 1

Collection

Series

Record Group

Basic Information

Dates

Extents

Agent Links

Subjects

Notes

External Documents

Rights Statements

Instances

Save Archival Object

Save

Box 1 Archival Object

Basic Information

Title * Box 1

Ref ID 151ddce23766c7b3f0964e6c069e2e49

Component Unique Identifier

Level of Description * Record Group

Language

Publish? Please be aware this record has an ancestor that is unpublished.

Restrictions Apply?

Enter the box number as Box # [use Arabic numerals, e.g. 1, 2, 3] in the **Title** box (green arrow above).

In the **Level of Description** dropdown menu, choose **Record Group** (purple arrow above).

Click the blue **Save** button (red arrow above).

Now you're ready to start entering folders/items.

Entering folders into a box

Make sure the Box # you need to add folders to is highlighted blue in the grey box (if it's not, click on the box # line to highlight it blue) (blue arrow below).

Click the **Rapid Data Entry** button (purple arrow below).

Home / Resources / Testing testing testing / Edit

Testing testing testing

Series I: Papers

Box 1

Collection

Series

Record Group

Basic Information

Dates

Extents

Agent Links

Subjects

Notes

Save

Box 1 Archival Object

Basic Information

Title * Box 1

Your screen will now look like this:

Rapid Data Entry

Basic Information					Date		
* Level of Description	Publish?	Title	Component Unique Id	Language	Expression	Date Type	Begin
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Keyboard Shortcuts

Jump from cell to cell: SHIFT + Arrow Keys

Create a new row (from last row): SHIFT + Return

Fill Column - Basic

Before you start entering any folders, do the following:

- 1) Click the **Columns: 23 visible** button and **uncheck** the following options (when you uncheck, the line on the menu will change from blue to white):
 - a. Basic Information—Component Unique Identifier
 - b. Basic Information—Language
 - c. Instance—Container 1 Barcode
 - d. Instance—Container 3 Type
 - e. Instance—Container 3 Indicator
 - f. Notes—Note 1
 - g. Notes—Content 1
 - h. Notes—Notes 2
 - i. Notes—Content 2
 - j. Notes—Notes 3
 - k. Notes—Content 3

When you get done, the **Columns** button should read **Columns: 12 visible** and the columns you unchecked will disappear from the Rapid Data Entry screen.

- 2) Take a closer look at the column headings/titles. You'll see that some of them are highlighted blue. However, you only want some of them to be highlighted blue as the highlighted ones will then fill automatically each time you add a row. So, you want to click on the column headings/titles for the following columns to unhighlight them as you don't want them to automatically fill for you:
 - a. Date Expression
 - b. Date Type
 - c. Begin
 - d. End

So, when you get done, the **following columns' titles should still be blue**:

- a. Level of Description
- b. Publish
- c. Instance Type
- d. Container 1 Type
- e. Container 1 Indicator (you may have to click on this one to turn it blue)
- f. Container 2 Type (you'll have to click on this one to turn it blue)

3) Now we're ready to start entering in our folders. You can hit the Tab key to move to the next column. Here's what you'll type in the box under each column:

- a. **Level of Description:** choose **File**
 - i. **Exception:** if the thing you're adding is not in a folder, it is an **Item**.
- b. **Publish?:** Leave **unchecked**
- c. **Title:** Put the folder title here, minus the date. **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 fields next to the Title column. The date includes Month, Semester, Season, Year, Day, or any combination of those.
- d. **Date Expression:** put in the date if it's a single date. Examples: January 14, 2011; Spring 1940; 1952; April 1980. If there's a range of dates, put them in the Date Begin and End columns. 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. If you only have a range of years, leave this column blank.
- e. **Date type:** Choose **Single** if you put anything in the Date Expression column. If you have a range of years, like 1955-1956, choose **Inclusive Dates**
- f. **Date Begin:** Only use if you have a range of years as the date (otherwise, leave blank). Only a 4 digit number can go in this field. If you have a range of years, put the earliest year in this column.
- g. **Date End:** Only use if you have a range of years as the date and have put the earliest year in the Date Begin. Use a 4 digit year and enter the latest year in this column. Otherwise, leave blank.
- h. **Instance Type:** 99% of our materials are going to be **text**, so choose **Text**. If the folder is a folder of **photographs**, choose **Graphic Materials**. If it's an **Audio** material (like a CD or cassette tape), choose **Audio**. If it's a **map**, choose **Maps**. If it's an **object** (like a medal, trophy, mug, hat, etc.), choose **Realia**.
- i. **Container 1 Type:** choose **Box**
- j. **Container 1 Indicator:** type the box #, using Arabic numerals (e.g. 1, 2, 3)
- k. **Container 2 type:** Choose **Folder** (unless it's an object, in which case it would be **Item**)
- l. **Container 2 Indicator:** type the folder #, using Arabic numerals

When you're done adding that folder, click the **big green plus sign** at the end of the row, or click the **green Add Row** button. A new row will appear below the first row, and it should have the following fields already filled in for you: Level of Description, Publish?, Instance Type, Container 1 Type, Container 1 Indicator, Container 2 Type.

Note: If you get annoyed by the red error box that keeps popping up, click the **View Inline Errors** button at the top of the screen and it will go away.

Fill in the correct information for the next folder. Change any of the already filled in fields if needed. Click the big green plus sign or the Add Rows button to add a new row. Repeat until you have all of the folders for the box entered.

Once you've got all of the folders for that box entered, click the big blue **Save Rows** button at the bottom of the screen. Wait for the Rapid Data Entry screen to disappear and for the resource record to load. Your screen should now look like this:

The screenshot shows a web interface for managing archival collections. At the top, there are navigation links: Home / Resources / Testing testing testing / Edit. Below this is a toolbar with buttons: Add Child, Add Sibling, Cut, Paste, Move, Transfer, and Rapid Data Entry. The main area displays a tree view of folders: Testing testing testing (Collection), Series I: Papers (Series), and Box 1 (Record Group). Under Box 1, there are two folders: Sample folder title, 1998 and Another sample title, 1996 - 1997. To the right of the tree is a table with columns for File, Text, and Box: 1, Folder: 1/2. Below the tree is a grey box containing a 'Save' button (highlighted with a green arrow) and an 'Add Event' button. A red box highlights a grey bar at the bottom of the folder list.

If you can't see the folders/box/series, just click on the dots on the little grey bar at the bottom of the grey box and drag down (see red box above). This will expand the grey box. Double click the plus sign next to the Series, box, folder, etc. to expand the list.

If you are **done entering folders for the collection** (as in there are **no more boxes** to add), click the big blue **Save** button (see green arrow above).

If you have **more boxes to add** to the collection, click on Box 1 in the grey box (if you're adding a box to the same series) so that it highlights blue. If you're adding a new series, click on the Series line in the grey box to highlight it blue (remember, if you need to add a new series, you add the series first, then add the box to the series).

If you're adding a **box**, after you've clicked on box 1 so it turns blue, click the **Add Sibling** button in the grey box (see the orange arrow in the above screenshot). Wait for the new Archival Object window to appear. Type the new box number in the **Title** box, and choose **Record Group** from the Level of Description menu.

So, it will look like this when you're done:

Home / Resources / Testing testing testing / Edit

Testing testing testing

- Series 1. Papers
 - Box 1
 - Archival Object

Collection
Series
Record Group

Basic Information

Save

Archival Object Archival Object

Basic Information

Title

Ref ID -- auto-generated upon save --

Component Unique Identifier

Level of Description

Language

Save Archival Object +1

Click the blue **Save** button. Then, follow the instructions listed on pages 8-10 to enter folders into this new box.

If you need to add a new series to the collection, click on the existing Series line in the grey box, click the **Add Sibling** button, type in the new series' title in the Archival Object's **title** box, choose Series from the **Level of Description** dropdown, and then click the blue Save button. When the resource record reloads, click on the series line you just created in the grey box, click Add Child, type in the box number in the Title box, choose Record Group from the Level of Description menu, and then click the blue **Save** button. Follow the instructions on pages 8-10 to add folders to the box.

Updating Finding Aids

Use when the finding aid has already been entered and you need to add new boxes/folders to said existing finding aid.

Once you're in ArchivesSpace and logged in, and you've opened up the Resource record for the collection you need to add folders/boxes to (see pages 3-4 for instructions on accessing AS, logging in, and opening the Resource record), you'll see a screen that looks like this after you've opened the Resource record:

Home / Resources / Testing testing testing / Edit

← → Add Child Paste Rapid Data Entry

Testing testing testing	Collection	
Series I: Papers	Series	

Basic Information

Save Add Event Publish All View Published Export

Testing testing testing Resource

Basic Information

Title * Testing testing testing

Identifier * 2014-067

Level of Description * Collection

Resource Type Collection

Language English

The grey box at the top (where it will have the collection title and the series names listed) is where you enter in the finding aid information you need to add. I've outlined this area in red in the screenshot above.

There are two things to consider before you update the finding aid—does the box you added folders to already exist in the finding aid, or did you have to make a new box when you added folders to the collection? See pages 13- for instructions on how to update the finding aid if you needed to add a box, and pages – for if you just added folders to a box(es) that already existed.

If you need to add a box:

Click on the correct series line that the new box needs to go into in the grey box. Once that Series line is blue, click the **Add Child** button (orange arrow below). Wait for the blue loading box to disappear.

You'll get a screen that will look like this (except it will say Archival Object instead of Box #):

Enter the box number as Box # [use Arabic numerals, e.g. 1, 2, 3] in the **Title** box (green arrow above).

In the **Level of Description** dropdown menu, choose **Record Group** (purple arrow above).

Click the blue **Save** button (red arrow above). Wait for the loading box to disappear.

Now you're ready to start entering folders/items.

If you're entering just 1-3 folders for a box, or if you need to enter a few folders to multiple boxes, see the instructions below:

- 1) Click on the plus sign next to the box title line (in the grey box) for the box you need to add folder(s) to.
- 2) Once the folders appear, click on the folder before the one you need to add (so, if you need to add folder 13, click on folder 12's line). Wait for the blue loading box to disappear.
- 3) Once it's gone, click the **Add Sibling** button at the top of the grey box. Wait for the blue loading box to disappear.

You'll see a screen that looks like this:

Testing testing testing	Collection		
Series I: Papers	Series		
Box 1	Record Group		
Sample folder title, 1998	File	Text	Box: 1, Folder: 1
Another sample title, 1996 - 1997	File	Text	Box: 1, Folder: 2
* Archival Object			

Basic Information

- Dates
- Extents
- Agent Links
- Subjects
- Notes
- External Documents
- Rights Statements
- Instances

Save Archival Object +1

Save

Archival Object Archival Object

Basic Information

Title

Ref ID -- auto-generated upon save --

Component Unique Identifier

Level of Description *

Language

Publish?

Restrictions Apply?

Repository Processing Note

Dates Add Date

Extents Add Extent

- 4) Put the folder title in the Title box. **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 fields below. The date includes Month, Semester, Season, Year, Day, or any combination of those.
- 5) Choose **File** from the **Level of Description** dropdown menu.
- 6) Click the **Add Date** button [if there are no dates, skip this step!]. Choose **Creation** from the **Label** dropdown menu. Then enter the date like this:
 - a. **Date Expression:** put in the date if it's a single date. Examples: January 14, 2011; Spring 1940; 1952; April 1980. If there's a range of dates, put them in the Date Begin and End columns. 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. If you only have a range of years, leave this column blank.
 - b. **Date type:** Choose **Single** if you put anything in the Date Expression field. If you have a range of years, like 1955-1956, choose **Inclusive Dates**

- c. **Date Begin:** Only use if you have a range of years as the date (otherwise, leave blank). Only a 4 digit number can go in this field. If you have a range of years, put the earliest year in this field.
 - d. **Date End:** Only use if you have a range of years as the date and have put the earliest year in the Date Begin. Use a 4 digit year and enter the latest year in this field. Otherwise, leave blank.
- 7) Scroll down the screen until you see the **Instances** line (it's the very last option on the page). Click the **Add Instances** button. Fill in the following in this section:
- a. **Instance Type:** 99% of our materials are going to be **text**, so choose **Text**. If the folder is a folder of **photographs**, choose **Graphic Materials**. If it's an **Audio** material (like a CD or cassette tape), choose **Audio**. If it's a **map**, choose **Maps**. If it's an **object** (like a medal, trophy, mug, hat, etc.), choose **Realia**.
 - b. **Container 1 Type:** choose Box
 - c. **Container 1 Indicator:** type the box #, using Arabic numerals (e.g. 1, 2, 3)
 - d. **Container 2 type:** Choose Folder (unless it's an object, in which case it would be Item)
 - e. **Container 2 Indicator:** type the folder #, using Arabic numerals
- 8) Click the big blue **Save** button (there are 2—one at the top of the screen above the Basic Information section where you entered the title, and then a second one at the bottom under the Instances section where you entered the box/folder information). Wait for the blue loading box to disappear.
- 9) If you need to **add another folder to the same box**, repeat steps 2-8.
- 10) If you need to **add folders to a different box** (and the box exists), do this:
- a. Click on the box title line (in the grey box) for the box you need to add folders to and click the **Add Child** button. Now repeat steps 2-8.
- 11) If you need to **add folders to a new box (the box doesn't exist in AS)** do this:
- a. Make sure you are in the appropriate series for the box/folders you need to add. If you need to add a series, see pages 6-8 for instructions on starting a new series and adding a new box.
 - b. If you are in the correct existing series (remember to click on the series title if you need to select a different series to add a box to), click on the plus sign next to the series title in the grey box to see all of the boxes in the series.
 - c. Click on the box title line (in the grey box) for the last box in the series and click **Add Sibling**. Wait for the blue loading box to disappear.
 - d. Enter the box number in the **Title** box, and choose **Record Group** from the Level of Description dropdown menu. Click the blue Save button and wait for the blue loading box to disappear.
 - e. Click on the box title line for the box you just created and click Add Sibling. Wait for the blue loading box to disappear.
 - f. Follow steps 4-8 to enter folders.

If you're entering lots of folders for one existing box, see the instructions on pages 8-11. Just remember that you only have to click the box title and then click Rapid Data Entry after the loading box disappears—you don't have to create a new box.

Adding Notes to AS

Open up the Resource record for the collection you need to add notes to. Be sure to open it in Edit mode, or click the blue Edit button at the top of the resource record.

Scroll down to the **Notes** section of the resource record. Look to see what notes are already present. If there are some present (usually it will be the Scope and Contents note and possibly a few others), then check to make sure the content of the **Label** and **Text** fields is accurate. If it's not, correct it.

To add a new note, click the **Add Note** button. Follow the grid below to add the appropriate notes.

The information that goes in the Text field can be copied over from the original finding aid in Word. The Label field's title corresponds to what section of the original finding aid you should copy over. Blue highlighted text is considered standardized text. Always use the language in the blue highlighted text for each collection, unless there is a note saying otherwise. Yellow highlighted text will need to be updated for each collection.

Select from Type menu:	Note Type	Put in the Label field	Put in the Text 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	© 2014 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) Or Administrative History (if it's an organization/department/anything that's not a person)	Copy the information from the Biographical/Historical note in the 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. The first two words of the Scope and Contents note are ALWAYS Collection contains 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.
Physical Location note	Physical 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.
Preferred Citation note	Preferred Citation note	Preferred Citation	[Identification of item], Collection Title, Special Collections and University Archives, Oklahoma State University Libraries. (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	Processed by: Name, Date (Copy the information from the Processing Information section in the original finding aid)
Immediate Source of Acquisition note	Immediate Source of Acquisition note	Provenance	Gift of: Name, Date (Copy the information from the Provenance section of the original finding aid.)

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

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

Once you're done adding all of the notes for the collection, click on each **Series** title in the big grey box and scroll down to the **Notes** section. Click **Add Note** and then choose the **Arrangement** note. Type Arrangement in the **Label** field, and then copy over the arrangement note found under the series title in the original finding aid into the Text field. This note will usually say Arranged chronologically, or Arranged by subject, etc.

Adding Subjects and Agents

Once you've added all of the notes for the collection and the series notes, you can add **Agent Links** (for adding the names of persons, corporate bodies, and families) and **Subject Headings**.

To add Agent Links:

Click back on the collection title in the big grey box. Once you're back in the main collection level record, scroll down to the **Agents** section. Click the **Add Agent Link** button.

Choose a role for the Agent (creator, subject, or source), and if desired, a relator from the appropriate dropdown menus. If you know the agent you want to add already exists in AS (as in you've made a agent record for that person already), type in the name in the Agent box and select it.

If you've never added this agent to AS (as in it's brand new), click the dropdown arrow next to the Agent box and choose Create from the dropdown menu. Choose the appropriate category for the Agent you are creating (person, corporate body, etc.). When the Create Agent box appears, tick the Publish box, and then fill in the dates of existence by clicking Add Date. If unknown, do not click Add Date. Fill in the Name Forms fields with the appropriate information. Add the Use Dates (if known) by clicking Add Use Date.

If you like, you can fill in contact information for the agent. This information will not be added to the public interface record.

When you're done, click Create and Link to Agent. The Agent will then be added to AS and linked to the resource record. To add another agent, just click the Add Agent Link button again and repeat these steps.

You can browse all of your agents or search for them across AS by either a) going to Browse→Agents or b) by searching for the Agent name in the search box at the top of the screen.

Adding Subject Headings

Adding subject headings works the same way as adding agents. Click on the collection title in the big grey box, and then scroll down to the Subject section. If you know you've already added a subject heading to AS, simply type in the term in the Subjects box, select it, and it will be added to the resource record.

If you need to create a new subject heading in AS, click on the arrow at the end of the Subjects box and choose Create from the dropdown menu. Fill in the appropriate boxes in the new window, and click Create and Link to Subject. The subject heading will be added to AS and linked to the resource record. If you need to add another subject heading, just click the Add Subject box and repeat these steps.

You can browse all of your subjects or search for them across AS by either a) going to Browse→Subjects or b) by searching for the Subject name in the search box at the top of the screen.

Final Steps

Click on the collection title in the big grey box and click the **Publish All** button that's just under the big grey box. This will make sure all of your stuff that's in the finding aid will show up in the public interface. You must hit Publish All everytime you change/update something in a finding aid (or wait until you're done making all necessary changes).

If there are folders/series/boxes/collections you don't want to have appear in the public interface, click on the needed folder/box/series/collection in the big grey box and click the yellow

Suppress button. Note that suppressing the whole collection will remove the collection from the public interface but it will still be visible in the staff interface. Suppressing a series will suppress everything in that series; suppressing a box will suppress everything inside that box, etc.

If you like, you can export several files from AS. In the collection level record, click the **Export** button (right under the big grey box). You can download container labels, a MARCXML record, and an EAD file (and also a PDF of your finding aid). To download an EAD file, click Export, then click Export EAD. Tick the first three tick boxes, then click Export, Export EAD again. The EAD file will start downloading. To download the PDF of a finding aid, click Export, then Export EAD. Tick all four of the boxes, and then click Export, Export EAD again. The PDF will start downloading.