

# **Guidelines for Creating Finding Aids Using Archivists' Toolkit**

Finding Aid content created using Describing Archives: A Content Standard (DACS). A PDF of the standard is here: <u>http://files.archivists.org/pubs/DACS2E-2013.pdf</u>. It also aligns with the guidelines set down by Northwest Digital Archives.

Archivists' Toolkit is an open-source piece of software that was created by archivists for archivists. It can be buggy sometimes, so be sure to click save regularly to ensure you don't lose work if something goes wrong!

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# Creating an Accession Record in Archivists' Toolkit

Check to see if the collection has an Accession record. If it does, make edits so that it aligns with the requirements listed below. If it does not, make an Accession record. Use the Deed of Gift\* to populate the fields. \*If no Deed of Gift present and/or no Accession number is present, contact Christine Runte to get a number and a copy of the Deed of Gift.

### **Basic Information Tab**

- Enter the Accession Number. The entire number should go in the first field in the **YYYY-MM-DD** format. If there is a number after a slash mark, it can go in the next field.
  - a. Example: For Douglas Aircraft Corporate Records (Accession No. 2012-10-24):

Accession Number 2012-10-24 Accession Date 10/24/2012	Basic Information	Accession Notes	User defined fields	Names & Subjects	Acknow
Accession Date 10/24/2012	Accession Number	2012-10-24			
	Accession Date 10	/24/2012			

- Fill in the Accession Date with the accession date. This is the date recorded in the accession number. If the collection has an FIC number, use 1/1/[year] for the accession date.
- Choose the **Resource Type**.
  - a. <u>Collection</u>: All collections in the Museum of Flight tend to be classified simply as Collections. This is partly because most donations are a blend of objects, photographs, and paper-based materials. There are two other options which may be applicable in rare circumstances:
    - i. <u>Records</u>: Materials created or received by an organization, public or private, in the conduct of their affairs.
    - ii. <u>Papers</u>: A collection of personal or family documents that is solely paper-based materials.
- Create a short **Title** for the collection you are working with. Make sure that the Title has the donor's and/or subject's name in it something to make the collection uniquely identifiable.
  - a. Examples: Smith Family Papers

Lt. John R. James Collection Jones Collection of TWA Materials

- Estimate the Extent of the collection as it is currently stored and enter the information. Give a Container
   Summary of the containers that currently house the collection. See Appendix A for a guide to standard container names and sizes.
- Give an estimate of time frame in the **Date Expression** field. If easily determined, you can also enter the Bulk and Inclusive Dates.
- Add any **Deaccessions**. This may be something that is updated after the Resource record is created and the collection has been fully sorted and catalogued, or there may be immediate deaccessions. Be sure to fill out all of the fields in the window that pops up for the Deaccession information. For items that are transferred, make note of these in the **Dispositions** note on the next tab.
  - a. Example of a **Deaccession** record:

1		23
Accessions	Deaccession Record 1	of 4
Deaccession Date	6/30/2014	
Description	One folder labeled 'Douglas Papers (copies for <u>McDonnell</u> Papers). Contains copies of several documents, including letters to and from Donald Douglas, technical drawings, and speech transcriptions.	*
Reason	The copies are of an unknown origin and the location of these original items is not recorded.	*
Extent 0.1	Linear 🖕	
Disposition	recycled	
Notification		
First	Previous Next Last Cancel OK	
Created: Jun 30, 2	2014 by Lindsay   Modified: Jun 30, 2014 by Lindsay   Record Nun	nbe

- Make sure a Location is added at the end of the process when the location of the rehoused collection is determined. See Appendix C for a guide to Locations and their codes.
- Make any **General Accession Notes** about the accession here as needed.
- Example of completed **Basic Information** tab:

a			
Accessions	Record 9 of 22		
Title: The Douglas Aircraft Company Corporate Records Collection	Accession #: 1995-06-23.15		
Basic Information Accession Notes User defined fields Names & Subjects Acknow	vledgements, Restrictions & Processing Tasks		
Accession Number 1995-06-23 15	Date Expression c. 1920s - 1940s		
Accession Date 6/20/2014	Date		
Resources Linked to this accession	Begin End		
Resource Identifier 🔺 Resource Title	Bulk Dates		
1995-06-23.15 The Douglas Aircraft Company Corpo 🔺	Begin End		
	Deaccessions		
Link Resource Remove Link	Deaccession Date Extent Extent Measurement		
	6/30/2014 0.1 Linear feet		
Resource Type Papers 👻	6/30/2014 0.2 Linear feet		
Title	Add Deaccession Remove Deaccession		
The Douglas Aircraft Company Corporate Records	Locations		
-	Location Note		
Extent	Research Center - 1st Floor - Library Black Cabinet, Rare Book Room		
Extent Number 60 Linear feet 🗸	-		
Container Summary Add Location Remove Location			
approximately 36 flat boxes and one manuscript box of documents  General Accession Note			
Separated from the Hatfield Collection (1995-6-23). The collection includes documents, technical drawings and books. The books have been separated and			
incorporated into the Museum of Flight Library.			
Repository MoF Archives Change Repository	•		
First Previous Next Last Reports Close Save			
FIISE PLEVIUUS NEXE LASE REPORTS LUSS SAVE			
Created: Jun 20, 2014 by Lindsay   Modified: Jun 30, 2014 by Lindsay   Record Num	ber: 2199		

#### **Accession Notes Tab**

• Click the **Accession Notes** tab to fill out more information about the collection.

- Enter an **Acquisition Type**. There are four options:
  - **Deposit**: For standard donations to the Museum, including collection separated off from other Deposits.
  - Gift: Use Deposit; they are considered the same thing by the Museum.
  - **Purchase**: For items purchased for the collection.
  - **Transfer**: This applies to both collections on loan to the Museum or collections that do not yet legally belong to the Museum.
- Enter a brief **Description** of the collection. Be sure to include the general subjects and topics covered and the types of materials.
- Give a short general assessment of the Condition of the collection. Add your name and the date of the condition assessment in brackets before your description. Make sure to note what has been done to stabilize any issues noted (you may have a bit of overlap here with the Processing Plan).
- Verify that the physical collection matches the inventory given in the Deed of Gift paperwork. Then fill out the **Inventory** field using the inventory from the Deed of Gift. You may also need to do a brief inventory if one does not exist, or add some detail to the Deed of Gift's inventory. You may also link to an existing document which gives the inventory for the collection. If one exists, use the **External Documents** field to link to any documents related to the collection.
- Use the **Disposition Note** to make note of anything from the collection which has been transferred. This includes listing objects in collections storage, garments in garment storage, items transferred to the Library, items given to other institutions, objects on display in the Museum, etc.
- Example of a completed **Accession Notes** tab:

al de la companya de	<u> </u>
Accessions	Record 3 of 10
Title: The Douglas Aircraft Company Corporate Records	Accession #: 1995-06-23.15
Basic Information Accession Notes User defined fields Names & Subjects Ackno	wledgements, Restrictions & Processing Tasks
Acquisition Type Deposit 👻	Inventory
Retention Rule	The full inventory is linked in the External Documents field below.
	Disposition Note
Description	Library collection transferred to Library; ledger on display in the Red Barn.
Collection of Douglas Corporate Papers, which arrived as part of the Hattield Collection. Mainly financial documents.	• External Documents
Condition	HREF Type Title Content
L. Zaborowski, 2014) Documents and ledgers are in good condition. Some of the covers for the ledgers are showing a bit of deterioration and red rot, but nothing yet to justify removing the covers. The original technical and engineering drawings are rolled and in poor condition. All of the ledgers are now housed in flat boxes and wrapped in archival tissue. The documents were rehoused in one manuscript box and	I:\Image Library\  External Docum  Douglas Inventory  I:\Image Library\   A
interleaved with archival paper where necessary. The items in the	Add Document Remove Document Open in Browser
First Previous Next Last Created: Jun 20, 2014 by Lindsay   Modified: Jul 24, 2014 by Lindsay   Record Num	Reports Close Save

Names & Subjects Tab

In the Names & Subjects tab, enter in some preliminary Names and Subjects. Make sure to note the subjects of the collection (including people, places, and things) and the donor. See Appendix C for a guide to adding Names and Subjects.

### Acknowledgments, Restrictions & Processing Task Tab

- Click on the Acknowledgements, Restrictions & Processing Tasks tab.
- Make note of any **Access Restrictions** and **Use Restrictions** in the appropriate fields.
- Assign the collection the **Processing Priority**. Be sure to update this when the processing is complete.
- Put your name in the **Processors** field.
- Outline your plan for processing the collection in the **Processing Plan** field. Be sure to update this field to reflect the actual processing once it is completed, in case of any changes in the plan.
- Enter the **Processing Started Date**.
- Give the **Processing Status**. Be sure to update this as your proceed with processing.
- Once the collection is processed, check the box and give the Processed Date. The Catalogued Date and Catalogued Note will be updated after the collection is processed, catalogued, and a Resource record is completed.
- Add **Catalogued Note** and reference the date completed and the final product produced.
- Example of a completed **Acknowledgements**, **Restrictions & Processing Tasks** tab:

Accessions	Record 9 of 22	
Title: The Douglas Aircraft Company Corporate Records Collection	Accession #: 1995-06-23.15	
Basic Information Accession Notes User defined fields Names & Subjects Ackno	wledgements, Restrictions & Processing Tasks	
Acknowledgements & Restrictions	Processing Tasks	
Acknowledgement Sent Acknowledgement Date	Processing Priority	
Agreement Sent Agreement Sent Date	Processors L. Zaborowski	
Agreement Received Agreement Received Date	Processing Plan	
Rights Transferred Rights Transferred Date	The collection was partly reprocessed in June 2014. All of the ledgers were housed in flat boxes and wrapped in archival tissue. The documents were	
Rights Transferred Note	rehoused in one manuscript box and interleaved with archival paper where	
	necessary. Items were reorganized by type of document, and chronologically within each of these subject groups. A book, a file of copies, an unrelated	
E	letter, and a file with a note about a ledger on display were deaccessioned from the collection (See: Deaccessions in the Basic Information tab).	
Restrictions Apply	Processing Started Date 6/20/2014	
Access Restrictions	Processing Status Processed -	
Access Restrictions Note	Processed Processed Date 6/30/2014	
	Cataloged Cataloged Date 7/8/2014	
E	Cataloged Note	
▼ ▼	Finding Aid completed 7/8/2014. The Resource record in AT is linked to this Accession record.	
Use Restrictions	Accession record.	
Use Restrictions Note		
The original drawings are rolled and are not in good enough condition to allow for researchers to use them.		
First Previous Next Last	Reports Close Save	
Created: Jun 20, 2014 by Lindsay   Modified: Jun 30, 2014 by Lindsay   Record Nun	nber: 2199	



## Creating a Resource Record in Archivists' Toolkit

If an Accession Record exists, begin by opening the Accession record in Archivists' Toolkit.

- Open the appropriate **Accession** record:
  - a. Double click on **Accessions**.
  - b. Use the Filter Search Results box to locate the collection you are processing.
  - c. Double click on the Accession record in order to open it.
  - Link the Accession Record to a new Resource Record:
    - a. Once you have opened the appropriate Accession Record, click on:
      - Resources Linked to this accession  $\rightarrow$  Link Resource  $\rightarrow$  Create Resource
- When you create a Resource record this way, some information transfers from the Accession Record into the Resource Record. Be sure to edit these fields if needed:

In the Accession Record	In the Resource Record
Title	Title
Date Expression, Inclusive Dates, Bulk Dates	Date Expression, Inclusive Dates, Bulk Dates
Extent Number	Extent Number
Container Summary	Container Summary
Names	Names
Subjects	Subjects
Condition	General Physical Description note
Description	Scope and Contents note
Access Restriction Note	Conditions Governing Access note

If you are working on a topical finding aid that describes resources from across various collections, start by clicking on **Resources** and then clicking **New Record** at the top of the window. Be sure to link to all relevant accession records as you add materials to the topical finding aid. You can do this by opening the **Accession Record** to the collection and then clicking the **Link Resource** button. In the dialog box, search for your Resource Record, highlight it, and then click **Link**.

Outlined below is a guide to each field in each tab of Archivists' Toolkit. The name of the field is given, followed by the DACS guideline it follows and then the directions for what to enter in each field. At the end of the guide are screenshots of a completed example for each tab. Required fields are in **blue**.

## **Basic Description Tab**

Field	DACS	Notes
<b>Resource Identifier</b>	2.1 Reference Code	Enter the Accession Number.
Level		Choose Collection unless directed otherwise.
Title	2.3 Title	Titles typically include the name of the person or
		organization or subject and then <b>Collection</b> . You may
		choose Papers or Records in some cases; see Resource
		Type in the Accession Record guide above for further
		explanation.
		Capitalize all words in the Title.
		Examples:
		The Douglas Aircraft Company Corporate Records
		The John Cook Collection
Date Expression	2.4 Date	Use <b>Date Expression</b> to put in something simple and
<b>Inclusive Dates</b>		human readable and then used Inclusive Dates to give
Bulk Dates		the specific date of the earliest and latest document. Bulk
		<b>Dates</b> is optional. Only use it if there is a major outlier –

		like if there is a letter from 1899 in a collection that otherwise dates from 1940-1980.
Language	4.5 Languages and Scripts of Material	Choose the primary language. Use the <b>Language of</b> <b>Materials</b> note to reference other languages in the collection.
Repository	2.2 Name and Location of Repository	Default value is MoF Archives.
Extent	2.5 Extent	Express the <b>Extent</b> in whatever way makes the most sense for the Collection at hand (*after processing*) – options include linear feet, cubic feet, folder(s) and item(s). We default to cubic feet for expressing box sizes. See Appendix A for the guide to describing boxes and their size in cubic feet.
Container Summary		Create a human readable description of the containers present. See Appendix A for a guide to standardized name for different box types. Begin each description with "-[space]" – this makes the PDF format read more clearly. <u>Examples:</u> - 1 document box containing 3 folders - 32 banker's boxes - 8 banker's boxes, two document boxes, and one oversized folder

### Names & Subjects Tab

Field	DACS	Notes
Names	2.6 Creator (*DACS only	Enter the name of the Creator and the Subjects of the
	requires a creator, if one is	collection. See Appendix B for the complete Names and
	known)	Subjects Guide.
		Examples:
		Tolkien, J. R. R. (John Ronald Reuel), 1892-1973
		King, Martin Luther, Jr., 1929-1968
Subjects		Add all relevant topical and geographic subject terms. See
		Appendix B for the complete Names and Subjects Guide.

### Notes Etc. & Deaccessions Tab

Below is a list of all of the **Notes** available in Archivists' Toolkit. Notes that are <u>required</u> are in <u>blue</u>, but other fields are highly recommended so be sure to fill out as many as necessary to give the full picture of the collection. <u>Do not</u> use the **Deaccessions** field in this tab – enter that information in the **Accession** record.

Field	DACS	What I Did/Notes
Biographical/	2.7 Administrative/	Sometimes collections require both Historical and
Historical Note	Biographical History	Biographical Notes, sometimes just one or the other – choose the course of action that feels most appropriate to the collection at hand. Think of this field as your opportunity to put the collection into a broader context for the researcher.
Scope and Contents	3.1 Scope and Contents	Describes the nature of the material and the activities that created them. Give an overview of what the collection contains and make note of how it was created and how it came to the Museum.
Arrangement	3.2 System of Arrangement	Use this field to describe the arrangement given during processing, or to describe the original order if that order was preserved.
Conditions Governing Access	4.1 Conditions Governing Access	Depending on if the collection is open or closed, enter: This collection is open for research. or This collection is not open for research.
Conditions Governing Use		If the condition of the collection (or parts of the collection) make it so researchers will not be able to handle the physical items, make note of that here. Also make note here if a surrogate copy is available.
Preferred Citation	7.1.5 Citation	Enter a <b>Preferred Citation</b> using this format: [folder number] and/or [box number]. [Collection Name]. The Museum of Flight (Seattle, Wash.).
Location		<ul><li>Add a Location if one of the items in the collection is on exhibit. Make a note of the item, its home in the collection, and where it is on exhibit. Also make a note that it is on exhibit in the entry for that specific item in the Collection Inventory.</li><li>Do not enter the physical location here. Enter the</li></ul>
Existence and		location in the <b>Accession</b> record.
Location of Copies		Make note of any copies/microfilm/digitized copies of items in the collection and how they can be viewed.
Separated Materials		Make a note here about any items separated from the collection. This typically will mean making note of items donated with the collection which have been transferred into the custody of the Library or are kept in Collections storage.
Abstract		Provide a brief summary of the collection using the first sentence of the Biographical/Historical Note and the first sentence of the Scope and Contents note. This is typically only needed for large collections.

Accruals	5.4.2 Accruals	Enter either:
	5.1.2 / icertails	Further accruals are expected
		Of
		No further accruals are expected
Language of Material	4.5.2	Use to make a comment about any languages in the
		collection other than the one indicated in the Basic
		<b>Description</b> tab.
<b>Related Archival</b>		This field can be used to make note of related archival
Materials		materials both within the Museum's collection and at
		other institutions. Make two notes if you are including
		both internal and external collections – call them Related
		Materials at The Museum of Flight and Related Materials
		at Other Institutions in these cases.
Appraisal		Not recommended. The field is primarily meant to
		provide information about the rationale for appraisal
		decisions, destruction actions, and disposition schedules
		that are relevant to the understanding and use of the
		materials being described.
Bibliography		Do not use this field. Add a 'Suggested Reading' or
		'Further Reading' list at the end of the
		<b>Biographical/Historical Note</b> and give citations there.
Index		If the collection has a large group of portraits or
		photographs, you may choose to list the people/objects
		in them here. This may be done in addition to the Names
		& Subjects tab, although in some cases this may be a
		more appropriate place for such information.
Other Finding Aids		Use this note to point researchers to completed finding
D1 1		aids for related collections.
Physical		Make note of any special equipment needed to view the
Characteristics and		items in the collection.
Technical		
Requirements	710 Due	Do not use. Put this information in the <b>Accession</b>
Processing Information	7.1.8 Processing Information	record.
Legal Status	momauon	Do not use.
Custodial History		Do not use.
Dimensions		Do not use.
File Plan		Do not use.
General		Do not use.
General Physical		Do not use.
Description		
Immediate Source of		Do not use.
Acquisition		
Material Specific		Do not use.
Details		
Physical Facet		Do not use.

# Finding Aid Data Tab

Field DACS Notes
------------------

Finding Aid Title	Enter a title using this format:	
	Guide to the [title from the Title field]	
	Example:	
	Guide to the Robert Short Collection	
Finding Aid Date	Enter the year.	
Author	Enter your name	
Description Rules	Choose DACS.	
Language of Finding	Enter English.	
Aid		
Finding Aid Status	Update this information as necessary.	

# Examples of Completed Resource Record Fields

# **Basic Description**

1		×		
Resources		Record 1 of 3		
Title: The Douglas Aircraft Company Corpora	te Records	Resource Identifier: 1995-06-23.15		
1995-06-23.15: The Douglas Aircraft C	Basic Description Names & Subjects Notes Etc. & Deaccessions Fir	nding Aid Data		
General Business Documents	Level collection -	Resource Identifier 1995-06-2: 15		
Folder 2	Other Level	Accessions linked to this Resource ID:		
<ul> <li>Folder 3</li> </ul>	Title	Accession Number Accession Title		
Folder 4 Folder 5 Folder 6	The Douglas Aircraft Company Corporate Records	1995-06-23         David Hatfield Aviation Res           1995-06-23.15         The Douglas Aircraft Compa		
Folder 7     Folder 8     Folder 9	v Wrap in tag v	-		
Folder 10	Date Expression circa 1920s through 1940s	Extent Number 60 Linear		
Folder 12	Inclusive Dates	Container Summary		
🖶 🎍 General Financial Information	Begin 1922 End 1945	- 36 flat boxes and 1 manuscript box		
Balance Sheets and Other Finance     Employee Information	Bulk Dates	- 36 flat boxes and 1 manuscript box		
🖮 🚡 Ledgers	Begin End	· · · · · · · · · · · · · · · · · · ·		
Engineering and Model Drawings -	ere ere	Instances		
	Language English (eng)			
	Repository Processing Note	Instance Type A Instance Label		
	L. L	^		
	= -	· · · · · · · · · · · · · · · · · · ·		
	Repository MoF Archives	Add Instance Remove Instance		
• • • • • • • • • • • • • • • • • • •	Change Repository	Restrictions Apply		
Add Add Sibling Rapid Data E	ntry Delete Component Transfer	Manage Locations Export Locations EAD EAD MARC Export Locations Labels		
	First Previous Next Last Reports Close Save			
Created: Dec 14, 2010 by Katherine   Modified:	Jul 9, 2014 by Lindsay   Record Number: 95			

## Names & Subjects

1				X
Resources				Record 1 of 3
Title: The Douglas Aircraft Company Corpora	te Records		Resource Identifier:	1995-06-23.15
1995-06-23.15: The Douglas Aircraft C	Basic Description Names & Subjects Not	es Etc. & Deaccessions Finding Aid Data		
Corporate Documents and Ledgers	Names			
General Business Documents				
Folder 2	Name	Name Link Function	Name Link Creator / Subject Role	
+ Folder 3	Davis, David R. Douglas Aircraft Company.	Subject Creator		<b>^</b>
Folder 4	Douglas, Donald Willis, Sr.	Subject		
Folder 5				
Folder 7				
Folder 8				
Folder 9				
<ul> <li>Folder 10</li> <li>Folder 11</li> </ul>				-
Folder 12	Edi	Name Link Add Name Link Remove	Name Link	
🖶 🍺 📜 General Financial Information				
Balance Sheets and Other Finance     Employee Information	Subjects			
Enployee mornation	Subject			
Engineering and Model Drawings -	Aircraft - Douglas			
	Anrufart - Douglas Aircraft Company, Santa Monica			
				-
· · · · · · · · · · · · · · · · · · ·		Add Subject Link Remove Subject Lir	ik	
				Export
Add     Image: Component     Add     Image: Component     Image: Componen				Cont.
Component infansier Locations EAD EAD Libels				
First Previous Next Last Reports Close Save				
Created: Dec 14, 2010 by Katherine   Modified: Jul 9, 2014 by Lindsay   Record Number: 95				
created, bee 14, 2010 by Ratierine   Mourried.	sary, 2017 by Emusay   Record Humber, 75			

Notes Etc. & Deaccessions

a			X
Resources			Record 1 of 3
Title: The Douglas Aircraft Company Corpora	ate Records		Resource Identifier: 1995-06-23.15
\mu 1995-06-23.15: The Douglas Aircraft C 🔺		otes Etc. & Deaccessions Finding Aid Data	
Corporate Documents and Ledgers	Notes etc.	Thinks the back	
General Business Documents			
Folder 1	Туре	Title	Content
Folder 3	Note on Arrangement	Arrangement Note	This collection has been organized into thr
Folder 4	Biographical/Historical Note Related Archival Materials	Historical Note Related Materials	The Douglas Aircraft Company was founded This collection represents a small part of t
<ul> <li>Folder 5</li> </ul>	Scope and Contents	Scope and Contents	The Douglas Aircraft Company Collection c
Folder 6	Conditions Governing Access	Conditions Governing Access	This collection is open for research.
Folder 7	Conditions Governing Use	Conditions Governing Use	Due to the condition of the original drawin
Folder 8	Accruals	Accruals	No further accruals are expected.
Folder 9 Folder 10	Preferred Citation	Preferred Citation	[folder number] and/or [box number]. The
Folder 10     Folder 11	Separated Materials	Separated Materials	This collection originally came to the Muse
Folder 12	Existence and Location of Copies	Existence and Location of Copies	The drawings from the Douglas Collection h
General Financial Information			
Balance Sheets and Other Finance			· ·
Employee Information	Add note of	etc.	Remove Note etc.
😟 🎍 Ledgers			
Engineering and Model Drawings -	Deaccessions		
	Deaccession Date	Extent	Extent Measurement
			· · ·
<		Add Deaccession Remove Deac	cession
Add Add Rapid Data I	Entry - Delete	Transfer Manage	Export Export Cont.
Child Sibling Rapid Data	Component	Locations	EAD EAD MARC MARC Labels
	First Previous Next	Last Reports Close Save	
Created: Dec 14, 2010 by Katherine   Modified:	: Jul 9, 2014 by Lindsay   Record Number:	95	
STATES AND COMPANY AND	K AND A MEL AND A REAL AND A		

Finding Aid Data

al 🛛					
Resources		Record 1 of 3			
Title: The Douglas Aircraft Company Corpora	te Records	Resource Identifier: 1995-06-23.15			
1995-06-23.15: The Douglas Aircraft C     Corporate Documents and Ledgers	Basic Description Names & Subjects Notes Etc. & Deaccessions Fi	inding Aid Data			
General Business Documents	EAD FA Unique Identifier	Sponsor Note			
Folder 1	EAD FA Location				
Folder 3	Finding Aid Title				
Folder 4	Guide to The Douglas Aircraft Company Corporate Records	Edition Statement			
Folder 6 Folder 7	<b>•</b>				
Folder 8	Finding Aid Subtitle				
Folder 9 Folder 10	<u>,</u>	Series			
Folder 11	Finding Aid Filing Title				
Folder 12     General Financial Information	A A A A A A A A A A A A A A A A A A A				
Balance Sheets and Other Finance					
Employee Information     Ledgers	Finding Aid Date 2014	Revision Date			
Engineering and Model Drawings -	Author	Revision Description			
	L. Zaborowski	Â			
	<b>•</b>				
	Description Rules	Finding Aid Status Completed -			
	Describing Archives:ard (dacs)  Language of Finding Aid	Finding Aid Note			
	English				
-	-	*			
Add     Sibling     Rapid Data Entry     Delete     Transfer     Manage     Export     Export     Cont.       Locations     Component     Transfer     Locations     Export     Locations     Export					
First Previous Next Last Reports Close Save					
First Previous Next Last Reports Close Save					
Created: Dec 14, 2010 by Katherine   Modified: Jul 9, 2014 by Lindsay   Record Number: 95					

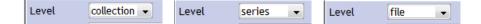
# Entering a Collection into Archivists' Toolkit and the Use of Child Elements

• So far this document has given directions for describing the top-level of a Collection record, which describes the collection as a whole. Child elements allow you to convey the hierarchy of your processed

collection by describing all of the boxes, folders, and items in the collection. To add a child element, highlight the entry in the finding aid you want to create a child for a click the Add Child button:



• Use the terms that reflect the physical organization in a logical and consistent manner when choosing a Level from the drop down menu.



Typically Series/Subseries/File/Item are all that is necessary to reflect the Boxes/[subset of boxes]/Folders/Items that make up most collections. Every collection is different, but the two examples are given below to give you an idea of what can be done using Archivists' Toolkit.

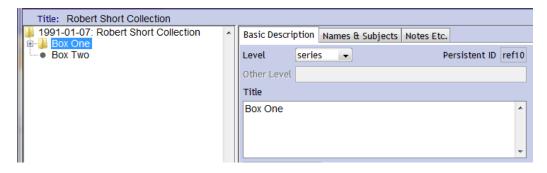
• For each child element, fill in **Title** and **Extent**, and do a **Contents** note [choose the Scope and Contents note but type "Contents" into the Note Label field if you will only be listing Contents]. Add other information and notes if necessary. Always follow the guidelines listed above.

#### **Examples:**

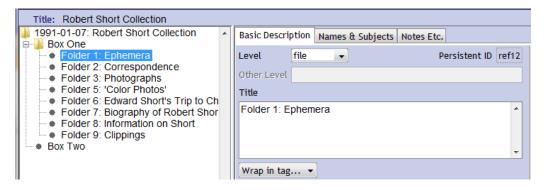
**Example One:** The Robert Short Collection consists of 2 boxes, one standard document case and one flat box. The Resource record looks like this:

Title: Robert Short Collection					
Box One	*	Basic Description	Names & Subjects	Notes Etc. & Deaccessions	Fin
Box Two		Level collec	ction 👻		
		Other Level			
		Title			
		Robert Short Co	llection		<u> </u>
				l	-
1					÷

The top level is **collection**, and then each box is a **series** within the collection:



Box One holds 9 file folders of materials, while Box Two holds oversized documents and photographs. Each folder in Box One is a child to the Box One series, and is assigned the level of **file**:



Box Two holds small group of oversized items, so in this case the contents of the box are inventoried in a Contents note, instead of each item being made a child to Box Two. Use your best discretion about how you want to describe the collection. In some cases a box like this might be better described by making a child to Box Two for each piece in the box, and assigning the record for each piece the level of **item**:

Title: Robert Short Collection			Resource Identifier:
1991-01-07: Robert Short Collection	Basic Description Names & Subjects Notes	Etc.	
Folder 1: Ephemera	Туре	Title	Content
Folder 2: Correspondence     Folder 3: Photographs     Folder 5: 'Color Photos'     Folder 6: Edward Short's Trip to Ch     Folder 7: Biography of Robert Shor     Folder 7: Biography of Robert Shor     Folder 9: Clippings     Box Two	Scope and Contents	Contents	Oversized materials including:Pl

**Example Two:** This is a much more complex record, which accurately reflects to size and scope of the physical collection. The Douglas Aircraft Company Corporate Records include 10 flat boxes of ledgers, 1 document box of records, and about 60 linear feet of boxes of drawings.

Here is a shot of the record at the **collection** level:



There are two **series** in this **collection**: the Corporate Documents and Ledgers and the Drawings. Within the **series** of Corporate Documents and Ledgers is a group of **subseries** based around the types of documents found in the **collection**:

1995-06-23.15: The Douglas Aircraft Con 🔺	Basic Description Names & Subjects Notes Etc.
Corporate Documents and Ledgers -	
🖶 🎍 General Business Documents	Level series  Persistent ID ref6
General Financial Information	Other Level
Balance Sheets and Other Financia	
Employee Information	Title
E- Ledgers	Corporate Documents and Ledgers -
Engineering and Model Drawings -	Corporate Documents and Ledgers -
	<b></b>

These subseries are then broken down to the folder level, and each folder is given the level of file:

Title: The Douglas Aircraft Company Corpor	ate Records
1995-06-23.15: The Douglas Aircraft Con 🔺	Basic Description Names & Subjects Notes Etc.
Corporate Documents and Ledgers -	Level series  Persistent ID ref6
Folder 1	Level Series V Persistent ib reio
Folder 2	Other Level
Folder 3	Title
Folder 4	
Folder 5	Corporate Documents and Ledgers -
Folder 6	
Folder 7	
Folder 9	
Folder 10	Wrap in tag
Folder 11	
Folder 12	Date Expression
😑 🎍 General Financial Information	Date
Folder 13	
Folder 14	Date Begin Date End
Folder 15     Folder 16	Bulk Dates
Folder 17	Bulk Date Begin Bulk Date End
+ Folder 18	
Folder 19	Language Code English (eng)
Folder 20     Balance Sheets and Other Financia	Repository Processing Note
Balance Sheets and Other Financia     Employee Information	insporter, installing note

The same is true of the Ledgers **subseries**:



The Drawings **series** is described by way of an item level inventory. This inventory is broken down into 8 parts, mainly because of character limits in the Scope and Contents field:

Title: The Douglas Aircraft Company Corpor	ate Records
1995-06-23.15: The Douglas Aircraft Con  Corporate Documents and Ledgers -	Basic Description Names & Subjects Notes Etc.
Engineering and Model Drawings - Drawings Inventory, Part One	Level series Persistent ID ref16
Drawings Inventory, Part Two     Drawings Inventory, Part Three	Other Level
<ul> <li>Drawings Inventory, Part Four</li> </ul>	Title Engineering and Model Drawings -
<ul> <li>Drawings Inventory, Part Five</li> <li>Drawings Inventory, Part Six</li> </ul>	
<ul> <li>Drawings Inventory, Part Seven</li> <li>Drawings Inventory, Part Eight</li> </ul>	-

### To Finish the Finding Aid

- Click Save one last time. Then click the Reports button and save a Finding Aid report as a PDF. The file name should be formatted like this:
  - o [accession number]\_[short title]
  - o Example:
    - 1992-07-24.1\_Becvar Family Collection.pdf
  - Open the PDF and check everything. Adjust in Archivists' Toolkit where necessary to achieve a clean and aesthetically agreeable format.
- Once the finding aid is finished and has been checked and given the OK, return to the Accession record and update the Catalogued and Catalogued Note fields in the Acknowledgments, Restrictions & Processing tab.



## **Appendix A: Describing Containers**

Below you will find the standard names and the measurement in cubic feet for the most common archival boxes and containers. Use these terms and measurements to fill out the **Extent** and **Container Summary** fields:

Name	Example	Measurements
Document Box		
Full width legal size		.50 cubic feet
Half width legal size		.25 cubic feet
Full width letter size		.40 cubic feet
Half width letter size		.20 cubic feet
Banker's Box		1.0 cubic feet
Dailker's Dox		1.0 cubic feet
	F	
Flat Box		*there are many different sizes. Use
		these measurements to estimate the
		cubic feet of your box if it is a
		different size.
11.5" x 17.5" x 3.75"		.45 cubic feet
16.5" x 20.5" x 3.75"		.75 cubic feet
20.5" x 24.5" x 3.75"		1.0 cubic feet
24" x 36" x 3"		2.5 cubic feet
Card Box		
3" x 5" card box (5.75" x 12 x 4")		.15 cubic feet
5" x 8" card box (9" x 6" x 11.9")		.40 cubic feet
Microfilm (in box)		
35mm roll		.02 cubic feet
16mm roll		.01 cubic feet
Name	Example	Measurements
Cabinet Drawers	1	

<b>Map Case</b> (52" 40" x 2.5" per drawer)	3.05 cubic feet
Letter Size Upright (15" x 25" x 9.5" per drawer)	2.05 cubic feet
Lateral Drawer (30" x 16" x 10" or 36" x 16" x 10" <u>per drawer</u> )	2.7 cubic feet (30") 3.0 cubic feet (36")
<b>Card Cabinets</b> (for 3" x 5": 3.25" x 14.5" x 5.25" <u>per drawer</u> )	.15 cubic feet

# **Appendix B: Guide to Creating Names and Subjects**

For the Names and Subject fields, the Museum of Flight Archives uses a combination of controlled vocabularies used by the Library of Congress in additional local controlled vocabularies that better reflect our unique collection.

### Subjects

For subjects, refer to the Library of Congress Subject Headings (LCSH) for purely topical and geographical terms. If the Subject term you need is not already in Archivists' Toolkit, you can add a subject term. The list of LCSH can be searched at <u>id.loc.gov</u>.

### Examples:

Fighter pilots Camping Manufacturing industries Paris (France)

For the following types of subject terms, refer to this list to find the formatting and source for our local subject terms: Aircraft, Aircraft Engines, Airlines, Airfields, Airports, Manufacturers, Space Flight Programs, Type of Archival Materials, Military Branches, Military Units, Air Force Bases, and Military Branches (Other Countries).

Below is a description for how to create each local subject term:

- AIRCRAFT- Type: Uniform Title
  - o Aircraft [name per NASM Directory of Airplanes]
  - o Directory found at: http://sirismm.si.edu/siris/aboutairplanedirectory.htm
    - e.g. Aircraft Boeing B-1 (Model 6)
  - <u>This format is also used for the following:</u> Helicoper, Spacecraft, Aircraft Carrier, Rocket, Motors, Flight Trainer, Missle, Battleship, Airship, Glider, Warship, Hydrofoil, Drone, Assault Carrier
    - <u>e.g.</u> Helicopter Hughes YOH-6 (Type 369)
- AIRCRAFT-RELATED TOPICS (type of aircraft (military, bomber, etc.), aircraft part, Type: Topical Term
  - 0 Aircraft [Term]
    - e.g. Aircraft Training
  - AIRCRAFT ENGINES Type: Uniform Title
    - o Aicraft Engine [Name]
      - e.g. Aircraft Engine Beardmore W.B. III
- AIRLINES Type: Uniform Title
  - o Airline [Name]
    - e.g. Airline United Airlines
- AIRFIELDS Type: Uniform title
  - Airfield [Name] (if the word field is missing after a name like "Munter", please add), Location
    - e.g. Airfield Munter Field, Renton, WA

- AIRPORT Type: Uniform title (use for well-known airports that had no military connection)
  - o Airport—[Name]

## • e.g. Airport – La Guardia Airport

- MANUFACTURERS Type: Uniform title
  - o Manufacturer—[Name]

### • e.g. Manufacturer – Boeing Company

- SPACE FLIGHT PROGRAMS Type: Uniform title
  - o Space Flight Mission [Name of program]

### • e.g. Space Flight Mission – Project Apollo

- TYPE OF ARCHIVAL MATERIALS (photos, negatives, publications) Type: Genre/Form. Please see the Archivist if you would like to add anything to this list which is not currently in Archivists' Toolkit.
  - o Photographic [type: Print, Negative, etc.]
  - o Art Work [Type]
  - o Drawings [Type]
  - o Audio Material [Type]
  - o Audiovisual Material [Type]
  - o Charts and Maps [Type]
  - o Object [Type]
  - o Philatelic [Type]
  - o Photographic Album [Type]
  - o Scrapbook [Type]
  - o Poster [Type]

- o Publication [Type]
- o Unpublished Material [Type]
- o Photocopies [Type]
- MILITARY BRANCHES Type: Uniform Title
  - o [full name] [partial abbreviation with periods] [full abbreviation no periods]
    - e.g. United States Air Force U.S. Air Force USAF
      - United States Army U.S. Army [note only branch with no full abb.]
      - United States Navy U.S. Navy USN
      - United States Marine Corps U.S. Marine Corps USMC
      - United States Coast Guard U.S. Coast Guard USCG
  - o See Grub Street Dictionary for others

### MILITARY UNITS (air forces, commands, groups, squadrons, etc.) – Type: Uniform Title

- o [Full military abbreviation] [Unit name]
- o e.g. USAF 107th Tactical Reconnaissance Squadron
  - U.S. Army 104th Infantry Division
  - U.S. Army Air Service 13th Aero Squadron
  - American Expeditionary Forces
- **NOTE:** Use formatting as follows for numbering conventions:
  - Air Forces (numbers spelled out) e.g. Eighth Air Force
  - Commands (use Roman numerals) e.g. IVth Command
  - Groups and squadrons (use numeral) e.g. 8<sup>th</sup> Squadron
- NOTE: For antecedent units for the U.S. Air Force, use this list:

- 1907-1926 U.S. Army Signal Corps Aeronautical Division
- 1920-1926 U.S. Army Air Service
- 1926-1942 U.S. Army Air Corps
- 1942-1947 U.S. Army Air Forces
- 1947- U.S. Air Force
- MILITARY BRANCHES (OTHER COUNTRIES)—Type: Uniform Title
  - o [country name] [Branch] (Use names in English)
  - o e.g. France Air Force

#### Adding new Subject Terms:

- Click New Record.
- Fill in each field in the top of the dialog box that opens.
  - Type in your **Subject Term**, either from the LCSH list or from the above local formatting and content guidelines.
  - Pick a **Type**. For LCSH, choose Topical Term for subjects and Geographic Name for places. For the local terms, use the **Type** indicated in the guidelines.
  - Choose a **Source** from the drop down box. There is an option for LCSH, and choose Local sources for any terms made using the guidelines above.
  - A **Scope Note** is not required but you may want to provide one if it would be helpful in distinguishing a term from another similar term.

#### Example:

Subjects	Record 88 of 3171
Subject Term	Aircraft - Airbus A310
Туре	Uniform Title (630)
Source	Local sources (local)
Scope Note	A 7

Subjects		Record 2513 of 3204
Subject Term	NASA - Project Echo	
Туре	Uniform Title (630)	
Source	Local sources (local)	<b>•</b>
Scope Note	Project Echo was NASA's first passive communications satellite experiment. Each spacecraft was designed as a metalized balloon satellite acting as a passive reflector of microwave signals. Communication signals were bounced off of them from one point on Earth to another.	

#### Names

For Names, the Museum of Flight uses the Library of Congress Name Authority Files. If a name is not available, we use the Library's cataloging standard to create our own name record (the Library of Congress uses an international standard called RDA (Resource Description & Access)). Please note that Jr. and Sr. may be used, but name records do not give titles (i. e. military rank).

#### Examples:

Bowers, Peter, 1952-Spaatz, Carl, 1891-1974 Boeing, William Edward, 1881-1956 Tolkien, J. R. R. (John Ronald Reuel), 1892-1973

### Adding a New Name Record

- Click New Record.
- A dialog box will pop up asking what type of name record. Typically you will be choosing Person, but Corporate Body and Family are also available.
- Fill in the following:
  - List the person's last name in the **Primary Name** field.
  - List the person's first and middle names (if known) in the **Rest of Name** field. You may also wish to list their initials and then their full name in parenthesis. Use whatever form of the name the person is known under (as in the case of the above example of J.R.R. Tolkien, whose publications are always printed under this name, not his full name).
  - If the person is a Junior or Senior and typically uses/used this suffix in their name, you can list it in the **Suffix** field.
  - List birth and/or death dates in the **Dates** field if known. If the person is still living, leave the dash open ended. Do not worry too much about including this information if you cannot find it in the collection or in a brief internet search.
  - For **Source**, list local sources if you are adding a name that is not in the Library of Congress Name Authority Files. If the person does have a Name Authority File, choose NACO.
  - For Rules, choose Anglo-American Cataloging Rules. (The Library of Congress used AACR2 until April 2013, when it switched to the new RDA cataloging rules. The information in Archivists' Toolkit is out of date, but choosing AACR2 is fine for now).
  - Notice that Archivists' Toolkit automatically generates a formatted name entry; use this to make sure your entry displays correctly as you input information.
  - If you have the information, it is helpful to include a short Biography, particularly for the primary subject of a collection. Choose Biography for **Description Type** and add a short biography in the **Description Note**. (\*this is typically used for the subject/creator of a collection. Do not worry about listing this information for Donors).
    - For Name records for donors of collections (which you will want to create so that you can link the name to your Accession Record) you can click on the **Contact Info** tab and input the information from the Deed of Gift.
  - Once you are done, click **Save**.

#### Examples:

This is the record for Lt. Col. James C. Stewart:

Names Record 12 of 12			
Stewart, James Clarence, 1919-2004			
	Details Non-Preferred Forms, Accessions, Resources & Digital Objects Contact Info		
Name Identity R	tecord: Person		
Prefix		Dates	1919-2004
Primary Name	Stewart	Qualifier	
Rest of Name	James Clarence	Fuller Form	
Title		Source	Local Sources (local)
Suffix		Rules	Anglo-American Cataloguing Rules (aacr)
Number		🔲 Direct O	rder
Sort Name Ste	Sort Name Stewart, James Clarence, 1919-2004		
Description Typ	P. Pingraphy		
Description Type Biography  Description Note Lieutenant Colonel James C. Stewart (1919-2004) was a fighter pilot in World War II and the Korean War. Born in Corona, California, he poined the Army Air Corps in 1939 and completed flight training in August 1940, whereupon he received his wings and a commission as a second lieutenant. He was then assigned to the 56th Fighter Group and promoted to Major. Later in the war he was transferred to the 8th Fighter command and then to the 65th Fighter Wing. Stewart remained in the Air Force after the War, serving in Korea and eventually earning a promotion to lieutenant colonel. He retired from the Air Force in August 1966. Lt. Col. Stewart passed away September 3, 2004 in San Jose, California.			
Citation			
Created: Jul 10, 2014 by Lindsay   Modified: Jul 24, 2014 by Lindsay   Record Number: 10050001			

This is the record for Space Services Inc. of America:

1		
Names	Record 228 of 6045	
Space Services Inc of	America	
	Forms, Accessions, Resources & Digital Objects Contact Info	
Name Identity Record:	Corporate Body	
Primary Name	Space Services Inc of America	
Subordinate 1		
Subordinate 2		
Number		
Qualifier		
Source	Local Sources (local)	
Rules	Local (local)	
Sort Name Space Ser	vices Inc of America.	
Description Type Admi	nistrative History 👻	
services through its subsidiary company. <u>Celestis</u> . Though today it buys secondary payload space on third-party commercial nockets such as Falcon I, Taurus, and <u>Spaceloft</u> XL, in the 1980s the company conducted test flights of several in-house rockets. In 1982, their <u>Conestoga</u> 1 rocket became the first privately funded rocket to reach space. Their last launch attempt, a <u>Conestoga</u> 1620 rocket, was launched in 1995, but broke up 46 seconds into its flight. The parent company, EER, subsequently folded and the Conestoga program was cancelled.		
Citation		
Created: Jun 7, 2013 by Amy   Modified: Jun 7, 2013 by Amy   M		

# **Appendix C: Location Codes**

Excised for public distribution.

## **Appendix D: Other Considerations**

This standards document covers the basics of writing a good finding aid. Below is a list of other items to consider and rules to follow as you describe the various items in the archival collections you catalog:

• For **Subjects**, always be sure to use the name that is contemporary to the archival collection you are processing. For example, if a collection created in the 1940s includes information about Camp Hood in

Texas, make sure to use the Subject term for Camp Hood, rather than the entry for the present day name Fort Hood.

- When writing numbers, spell out everything up to one hundred. Follow up the written-out number with the Arabic numeral in parentheses.
  - o Examples: Fifteen (15) photographs of James Bond.
    - Twenty-six (26) stamps showing various Disney characters.
- For military conflicts:
  - 0 Always refer to the world wars as World War I and World War II
  - For all other conflicts, defer to the Library of Congress subject heading.
- Any time you make an annotation or editorial note in a description or transcription, make sure to put it in [brackets] not (parentheses).
- Specify the type of copy when you describe something as a copy (i.e. photocopy, photographic copy, Photostat, mimeograph, ditto).
- For describing containers in collections, spell out the box numbers and list the Arabic numeral for folder numbers. Examples:
  - o Box One, Folder 17
  - o Box Three, Folder 5
- When referring to objects separated from the archival collection, describe their location as 'Objects Storage.'
- Always include the nicknames of people when discussing them in Scope and Contents, Biographical Notes, Historical Notes, etc. Many people are known better by their nickname than their given name, and we want to ensure that users will find a person even if searching for them only by their nickname.
- If there are images of aircraft in the collection that do not have identification, make a note in the Scope and Contents that the aircraft have not all been identified and that full identification in forthcoming.
- There is a 10,000 character limit in the notes fields in Archivist Toolkit.
- For describing black and white photographs/negatives, you can use black and white or black & white use whatever looks and flows better with the sentence you are writing.
- Italicize all airplane and ships names. Unofficial names of aircraft are put in quotes.
  - o Examples: Boeing 747 City of Everett

USS Missouri

Boeing B-29 Superfortress "Enola Gay"

- For dates, use these standards as a guide:
  - o Full dates: January 1, 1900
  - o Numerical dates: MM/YY/DDDD
  - o Estimated dates: Circa 1900s (NO apostrophe)
  - o Examples of dates in a sentence: Small book of photographs, circa January 1899.

Photograph of Boeing Plant 2, March 2, 1945.

Letter from John Jones to Robert Smith, circa 1945.

Photograph of a soldier in France, circa 1940s.

- The early Boeing plants are referred to as Plant I and Plant II.
- When photographs are included in a collection, please make a note if they are official photographs belonging to Boeing, the United States Military, etc.
- With any abbreviations, always be sure to spell out the full phrase the first time it appears. If an abbreviation
  appears in an inscription, make note of the full phrasing in brackets. Another common set of abbreviations
  in the collection is military ranks. Below is a chart of the various United States Military ranks and
  abbreviations:

U. S. Army	
Rank	Abbreviation
Private	PVT
Private First Class	PFC
Specialist	SPC
Corporal	CPL
Sergeant	SGT
Staff Sergeant	SSG
Sergeant First Class	SFC
Master Sergeant	MSG
First Sergeant	1SGT
Sergeant Major	SGM
Command Sergeant Major	CSM
Sergeant Major of the Army	SMA
Warrant Officer	WO
Lieutenant	LT
Captain	СРТ
Major	MAJ
Lieutenant Colonel	LTC
Colonel	COL
Brigadier General	BG
Major General	MG
Lieutenant General	LTG
General	GEN
U. S. Navy	
Rank	Abbreviation
Seaman Recruit	SR
Seaman Apprentice	SA
Petty Officer	РО
Chief Petty Officer	СРО
Senior Chief Petty Officer	SCPO
Master Chief Petty Officer	МСРО
Warrant Officer	WO
Lieutenant Junior Grade	LTJG
Lieutenant	LT
Lieutenant Commander	LCDR
Lieutenant Commander	LCDR
Commander	CDR
Captain	CAPT
Rear Admiral (Lower Half)	RDML
Rear Admiral (Upper Half)	RADML
Vice Admiral	VADM
Admiral	ADM
Fleet Admiral	FADM
U. S. Air Force	TADM
Rank	Abbreviation
Airman Sonior Airmon	Amn
Senior Airman	SrA SS at
Staff Sergeant	SSgt26

Technical Sergeant	TSgt
Master Sergeant	MSgt
Senior Master Sergeant	SMSgt
First Sergeant	1stSgt
Senior Master Sergeant	SMSgt
Chief Master Sergeant	CMSgt
Command Chief Master Sergeant	CCMSgt
Chief Master Sergeant	CMSAF
of the Air Force	СМБАГ
First Lieutenant	1st Lt
Second Lieutenant	2d Lt
Captain	Capt
Major	Maj
Lieutenant Colonel	LtCol
Colonel	Col
Brigadier General	BrigGen
Major General	MajGen
Lieutenant General	LtGen
General	Gen