THE
MUSEUM
OF FLIGHT

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: http://files.archivists.org/pubs/DACS2E-2013.pdf. 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!

Contents

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)**:

▪ 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:

- 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:

Accession Notes Tab

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

- Enter an **Acquisition Type**. There are four options:
  o **Deposit**: For standard donations to the Museum, including collection separated off from other Deposits.
  o **Gift**: Use **Deposit**; they are considered the same thing by the Museum.
  o **Purchase**: For items purchased for the collection.
  o **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:

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:

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 → Link Resource → 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
Resource Identifier	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 **Collection**. 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. <u>Examples:</u> The Douglas Aircraft Company Corporate Records The John Cook Collection
Date Expression **Inclusive Dates** **Bulk Dates**	2.4 Date	Use **Date Expression** to put in something simple and human readable and then used **Inclusive Dates** to give the specific date of the earliest and latest document. **Bulk Dates** 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 **Language of Materials** 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 **Extent** 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 requires a creator, if one is known)	Enter the name of the Creator and the Subjects of the collection. See Appendix B for the complete Names and Subjects Guide. <u>Examples:</u> 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 **blue**, 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/ Historical Note	2.7 Administrative/ Biographical History	Sometimes collections require both Historical and 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 **Preferred Citation** using this format: **[folder number] and/or [box number]. [Collection Name]. The Museum of Flight (Seattle, Wash.).**
Location		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. Do not enter the physical location here. Enter the location in the **Accession** record.
Existence and 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: **Further accruals are expected** or **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 Description** tab.
Related Archival Materials		This field can be used to make note of related archival 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 **Biographical/Historical Note** 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 aids for related collections.
Physical Characteristics and Technical Requirements		Make note of any special equipment needed to view the items in the collection.
Processing Information	7.1.8 Processing Information	Do not use. Put this information in the **Accession** record.
Legal Status		Do not use.
Custodial History		Do not use.
Dimensions		Do not use.
File Plan		Do not use.
General		Do not use.
General Physical Description		Do not use.
Immediate Source of Acquisition		Do not use.
Material Specific Details		Do not use.
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 Aid		Enter English.
Finding Aid Status		Update this information as necessary.

Examples of Completed Resource Record Fields

Basic Description

Names & Subjects

Notes Etc. & Deaccessions
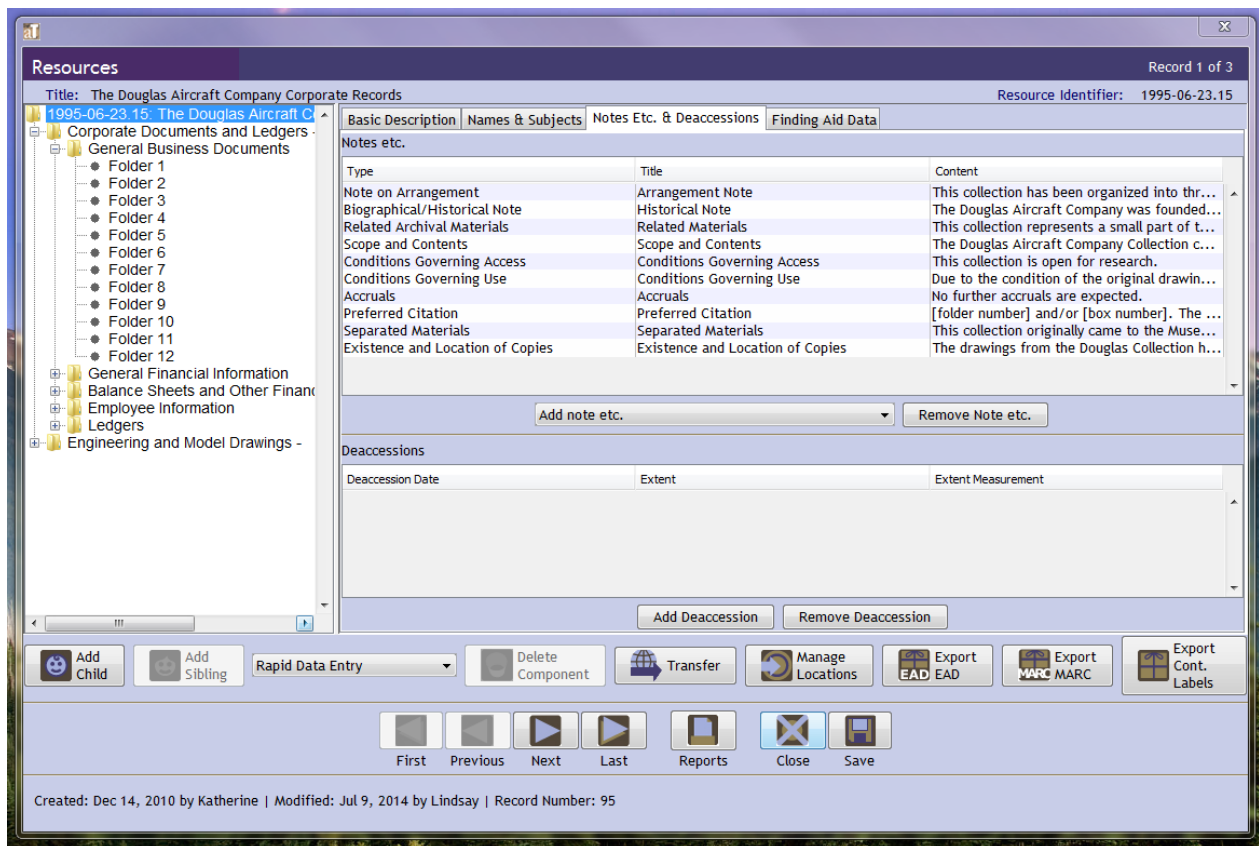
Finding Aid Data

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.

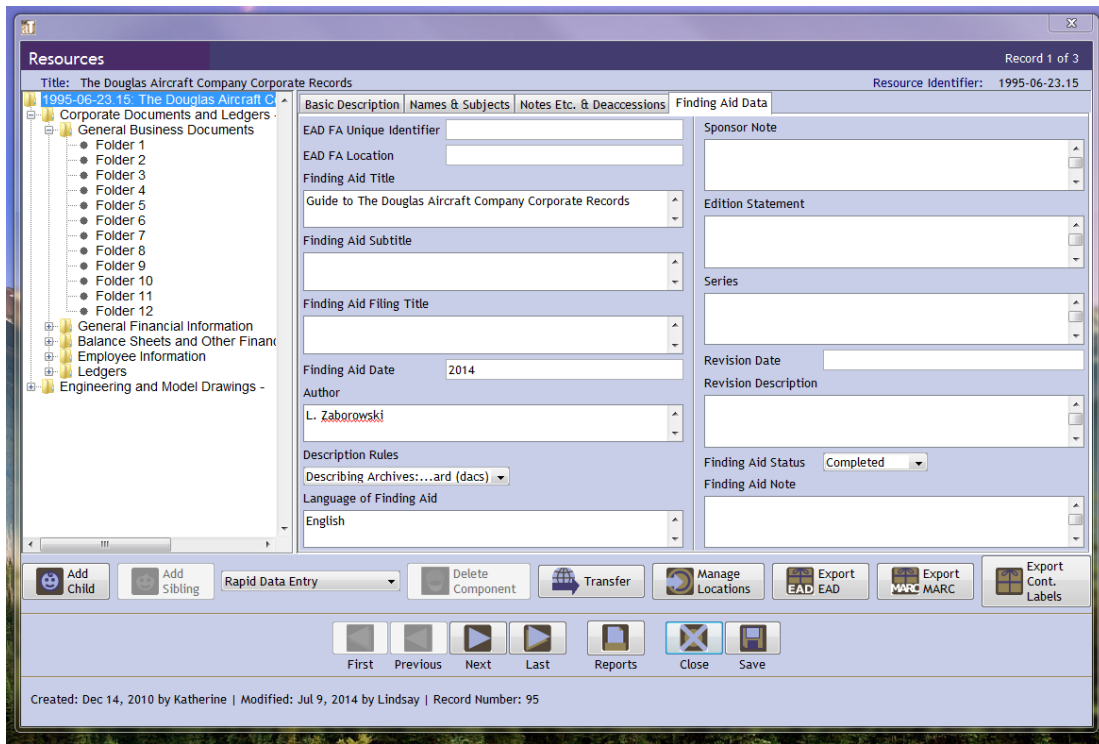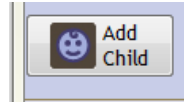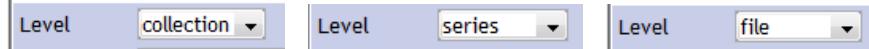Typically **Series/Subseries/File/Item** are all that is necessary to reflect the **Boxes/[subset of boxes]/Folders/Items** that make up most collections. Every collection is different, but the two examples are given below to give you an idea of what can be done using Archivists' Toolkit.

- 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:
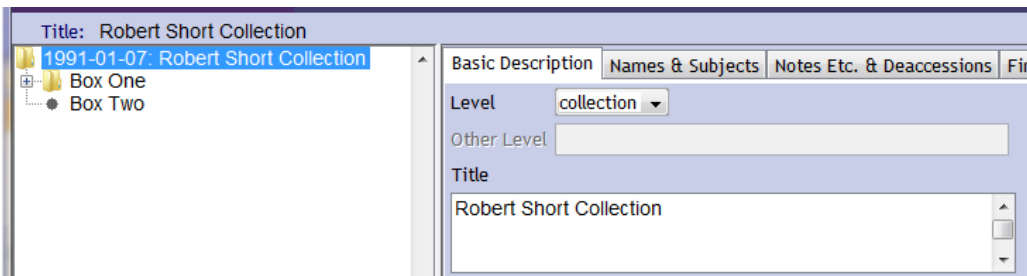
The top level is **collection**, and then each box is a **series** within the collection:
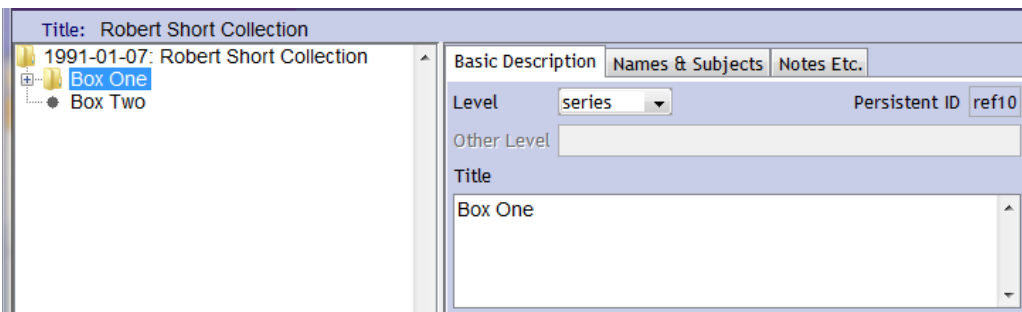
Box One holds 9 file folders of materials, while Box Two holds oversized documents and photographs. Each folder in Box One is a child to the Box One series, and is assigned the level of **file**:
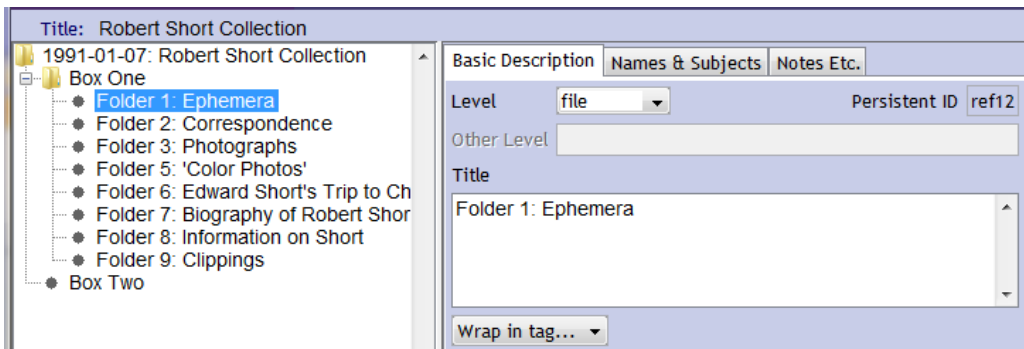
Box Two holds small group of oversized items, so in this case the contents of the box are inventoried in a Contents note, instead of each item being made a child to Box Two. Use your best discretion about how you want to describe the collection. In some cases a box like this might be better described by making a child to Box Two for each piece in the box, and assigning the record for each piece the level of **item**:
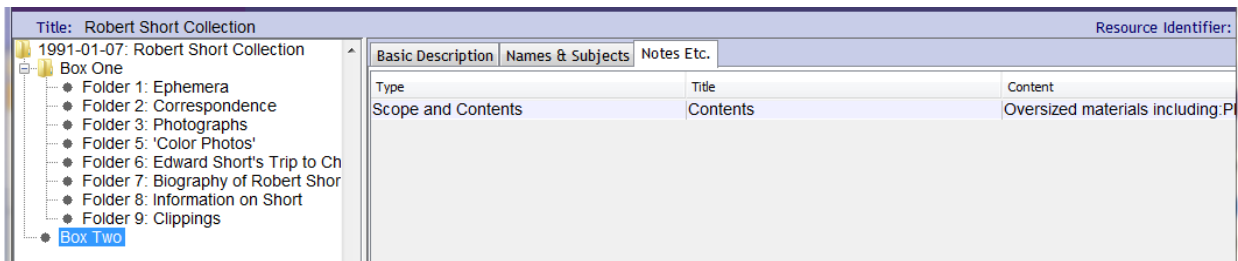
Example Two: This is a much more complex record, which accurately reflects to size and scope of the physical collection. The Douglas Aircraft Company Corporate Records include 10 flat boxes of ledgers, 1 document box of records, and about 60 linear feet of boxes of drawings.

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

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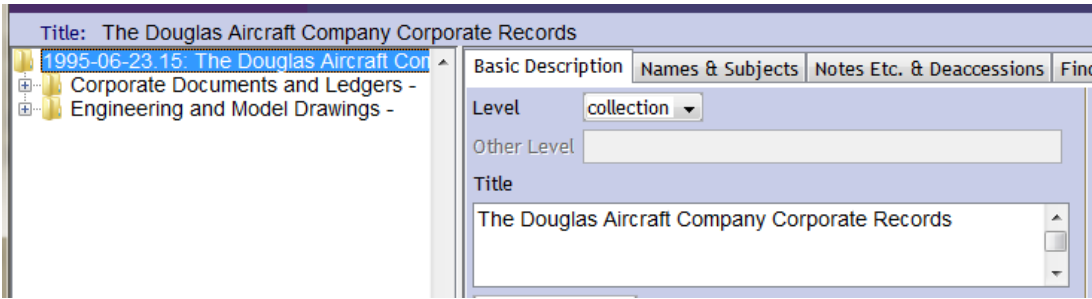
There are two **series** in this **collection**: the Corporate Documents and Ledgers and the Drawings. Within the **series** of Corporate Documents and Ledgers is a group of **subseries** based around the types of documents found in the **collection**:
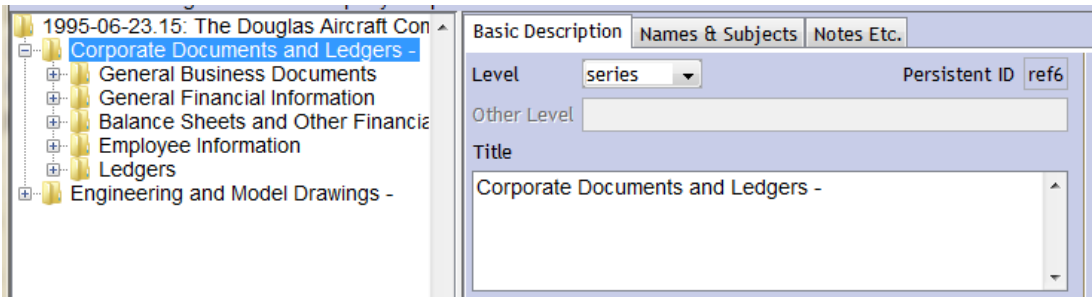
These **subseries** are then broken down to the folder level, and each folder is given the level of **file**:
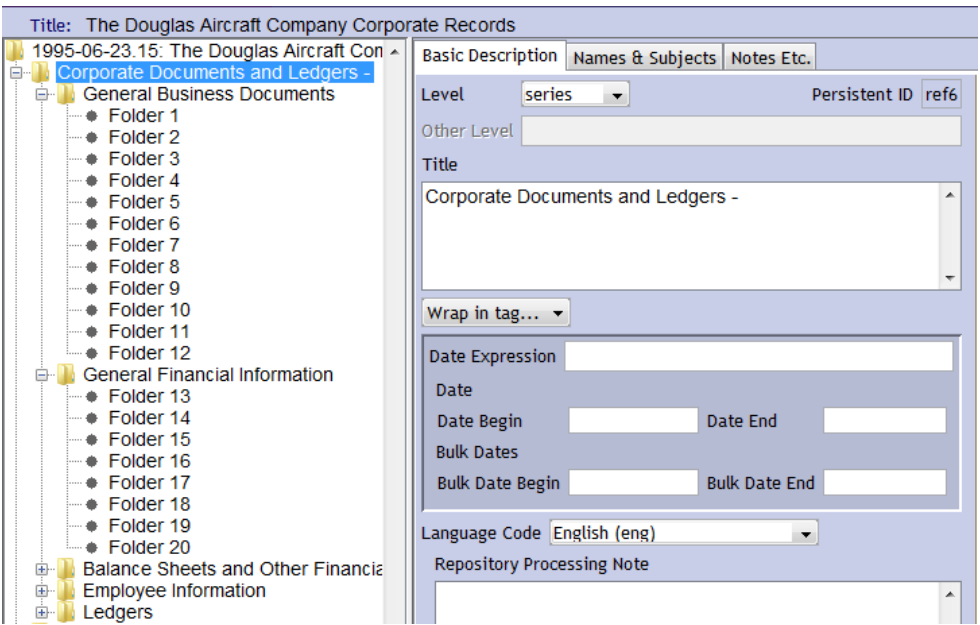
The same is true of the Ledgers **subseries**:
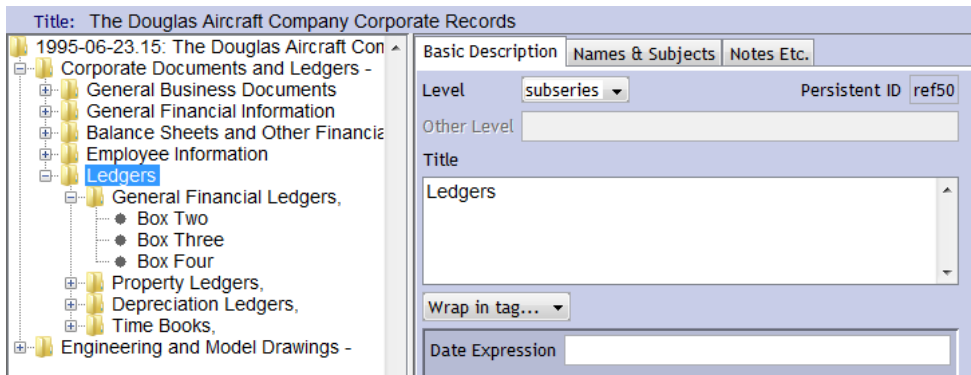
The Drawings **series** is described by way of an item level inventory. This inventory is broken down into 8 parts, mainly because of character limits in the Scope and Contents field:
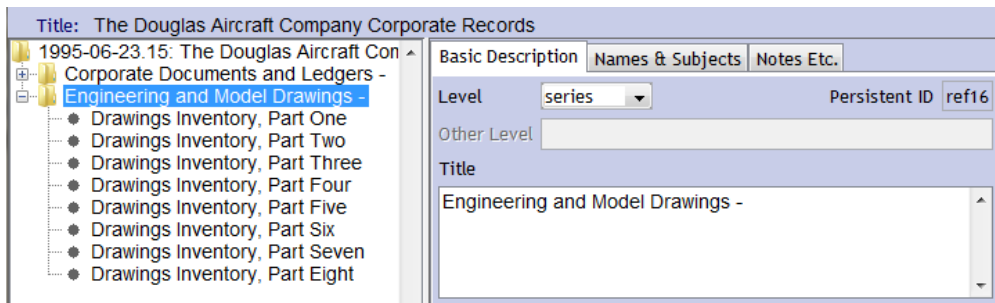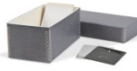
To Finish the Finding Aid

- 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:
    - [accession number]_[short title]
    - 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
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		

Map Case (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" per drawer)		2.7 cubic feet (30") 3.0 cubic feet (36")
Card Cabinets (for 3" x 5": 3.25" x 14.5" x 5.25" per drawer)		.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 id.loc.gov.

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
    - Aircraft – [name per NASM Directory of Airplanes]
    - Directory found at: http://sirismm.si.edu/siris/aboutairplanedirectory.htm
        - e.g. **Aircraft - Boeing B-1 (Model 6)**
    - This format is also used for the following: Helicoper, Spacecraft, Aircraft Carrier, Rocket, Motors, Flight Trainer, Missle, Battleship, Airship, Glider, Warship, Hydrofoil, Drone, Assault Carrier
        - e.g. **Helicopter - Hughes YOH-6 (Type 369)**
- AIRCRAFT-RELATED TOPICS (type of aircraft (military, bomber, etc.), aircraft part, – Type: Topical Term
    - Aircraft – [Term]
        - e.g. **Aircraft – Training**
- AIRCRAFT ENGINES – Type: Uniform Title
    - Aicraft Engine – [Name]
        - e.g. **Aircraft Engine – Beardmore W.B. III**
- AIRLINES – Type: Uniform Title
    - 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)
  - Airport—[Name]
    - e.g. **Airport – La Guardia Airport**
- MANUFACTURERS – Type: Uniform title
  - Manufacturer—[Name]
    - e.g. **Manufacturer – Boeing Company**
- SPACE FLIGHT PROGRAMS – Type: Uniform title
  - 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.
  - Photographic – [type: Print, Negative, etc.]
  - Art Work – [Type]
  - Drawings - [Type]
  - Audio Material – [Type]
  - Audiovisual Material – [Type]
  - Charts and Maps - [Type]
  - Object – [Type]
  - Philatelic – [Type]
  - Photographic Album – [Type]
  - Scrapbook – [Type]
  - Poster - [Type]
  - Publication – [Type]
  - Unpublished Material – [Type]
  - Photocopies – [Type]
- MILITARY BRANCHES – Type: Uniform Title
  - [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
  - See Grub Street Dictionary for others
- MILITARY UNITS (air forces, commands, groups, squadrons, etc.) – Type: Uniform Title
  - [Full military abbreviation] – [Unit name]
  - 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. 8th 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
  - [country name] – [Branch] (Use names in English)
  - 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
Type	Uniform Title (630)
Source	Local sources (local)
Scope Note	

Subjects	Record 2513 of 3204
Subject Term	NASA - Project Echo
Type	Uniform Title (630)
Source	Local sources (local)
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 Record: 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 Order

Sort Name: Stewart, James Clarence, 1919-2004   ☑ Create Sort Name Automatically

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 joined 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:

First | Previous | Next | Last | Reports | Close | Save

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:

Names — Record 228 of 6045

Space Services Inc of America.

Details | Non-Preferred 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 Services Inc of America.   ☑ Create Sort Name Automatically

Description Type: Administrative History

Description Note: Space Services, Inc. of America is a space services company that provides star naming services as well as space memorial services through its subsidiary company, Celestis. Though today it buys secondary payload space on third-party commercial rockets such as Falcon I, Taurus, and Spaceloft XL, in the 1980s the company conducted test flights of several in-house rockets.

In 1982, their Conestoga 1 rocket became the first privately funded rocket to reach space. Their last launch attempt, a Conestoga 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:

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Created: Jun 7, 2013 by Amy | Modified: Jun 7, 2013 by Amy | Record Number: 9470002

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:
    o Always refer to the world wars as World War I and World War II
    o 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	CPT
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	PO
Chief Petty Officer	CPO
Senior Chief Petty Officer	SCPO
Master Chief Petty Officer	MCPO
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)	RADM
Vice Admiral	VADM
Admiral	ADM
Fleet Admiral	FADM

U. S. Air Force	
Rank	Abbreviation
Airman	Amn
Senior Airman	SrA
Staff Sergeant	SSgt

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 of the Air Force	CMSAF
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