The Metropolitan Museum of Art Archives

Archivists' Toolkit Manual

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I. Overview

The Archivists' Toolkit™ (AT), an open source archival data management system, was implemented by the Archives in March 2009 for the management of inactive record and manuscript collections. Several other departments have installed AT clients since 2009, including Watson Library, The Cloisters Archives and Library, European Sculpture and Decorative Arts, and Greek and Roman Art. All clients share the same database back-end, which is maintained by the Information Systems and Technology department (IS&T). Updates to the software and technical troubleshooting are handled by IS&T. All data entry, editing, output, searching, and customization of the software's user interface is managed via the client to various degrees depending upon the user's access class.

The AT was the first such database system to be used by the Archives, and most of the extant data was input directly into the AT. Several analog and electronic (Microsoft Word, PDF) legacy inventories and finding aids from the Museum Archives, Watson Library, and the Cloisters were imported in to the system using the method described in *Archivists' Toolkit Inventory Import Tools: Instructions*. Records in the AT are therefore in various states of completion and many collections cataloged in the AT still require formal processing and finding aid creation.

Currently, accession, finding aid, and digital object information is stored in but not exported from the AT. The Archives is in the process of developing a web-interface for the display of AT-generated XML-encoded documents in collaboration with Digital Media. Until such a site is launched, completed finding aids are served to the public as PDFs linked to MARC records available through the Museum Library's OPAC, Watsonline, and Worldcat. Typically, these PDFs are derived from Microsoft Word documents (separate documents, not linked to the AT since the stylesheet governing PDF output from the AT is ill-formatted). See the *Metropolitan Museum of Art Archives Processing Manual* for a template for finding aids created in Microsoft Word.

The AT is designed for users with some processing experience. Inexperienced processors may require more of an introduction to the archival principles of arrangement and description than is provided within this manual. This manual is not intended as a complete technical guide to the AT, which can be found at the AT website (http://archiviststoolkit.org/ under the **Support** tab), but rather instructions for the standard use of the AT at the Metropolitan Museum. For more information about cataloging standards, consult *Describing Archives: A Content Standard (DACS)* (Chicago: Society of American Archivists, 2004).

I.A. Access Classes

Managing Archivist James Moske and Archivist Adrianna Del Collo are the primary database administrators. As such, they are set to an access class of 5, the highest level available. Archivist Barbara File, Assistant Archivist Melissa Bowling, and the lead users from departments outside the Archives are set to an access class of 4. Access classes 5 permits full use, and class 4 slightly limited use, of an administrative menu bar that includes items to enable the setup and configuration of the user interface of the application across repositories (including setting user and repository profiles and creating location records, managing the import of data, and the creation of assessment records). Interns and others responsible for data entry are set at an access class of 2 with the user name 'Intern' and password 'intern', and do not have access to the administrative menu bar. Note that each department is considered its own repository and each user profile should be set to the proper repository designation. This setting ensures that a user can view and manipulate data created by their own repository exclusively. An access class of 5 enables users to view, search, and manipulate data across repositories. Users with a lower access class may be temporarily upgraded to class 5 at the discretion of a database administrator.

I.B. Launching Archivists' Toolkit

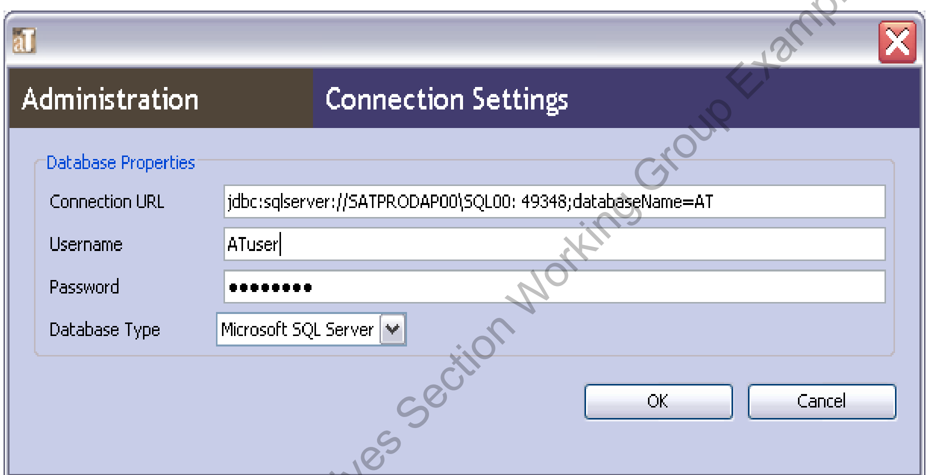
The *first* time a user launches the AT on a computer installed with the AT client, the program will request the following connection information. Thereafter, the **Connection Settings** window will not appear for the users unless AT is being opened on a new computer.

To open the AT, go to the **Start** 

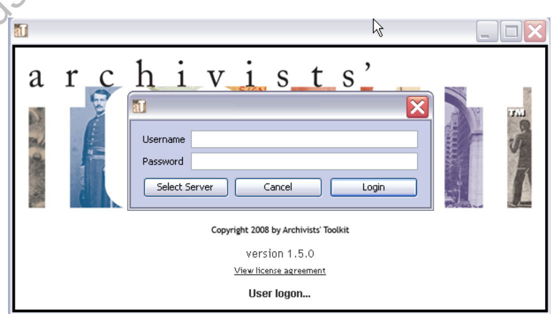
button, click the **Programs** menu, and select **Archivists' Toolkit 2.0 (update 7)**. For ease of access, create a shortcut on the desktop.

Enter the following information into the fields by copying and pasting into the **Connection Settings** window. *This information has to be entered only once for each computer user.*

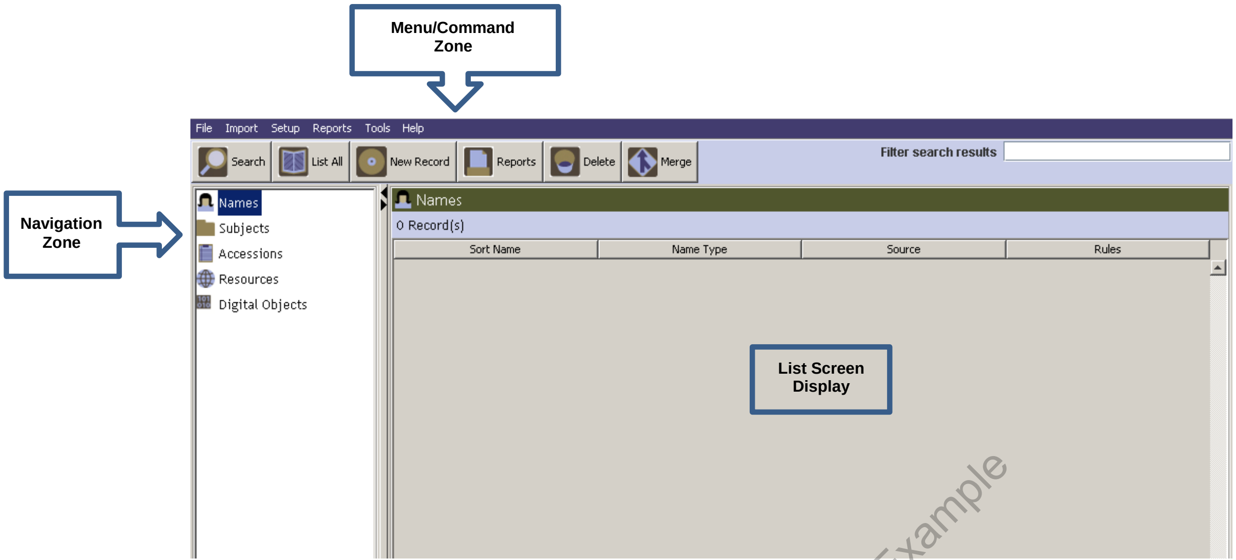
- Connection URL field - **jdbc:sqlserver://SATPRODAP00\SQL00: 1433;databaseName=AT**
- Username Field – **ATuser**
- Password Field - **2reqeBeY**
- Database Type – **Microsoft SQL Server**



The user will then be prompted for login credentials. Enter your username (usernames *are not* case-sensitive) and password (passwords *are* case-sensitive) and click the **Login** button or press enter on your keyboard.



The AT opens to a neutral display, in which the list screen display is blank. The navigation zone to the left of the list screen display provides the user with portals to five functional areas: **Names** (for personal, corporate, or family names), **Subjects** (for subject headings), **Accessions** (for information related to accessioning manuscript or record collections), **Resources** (for finding aid data from the collection to item levels), and **Digital Objects** (for metadata about scanned documents, audio files, or other digitized or born-digital materials).



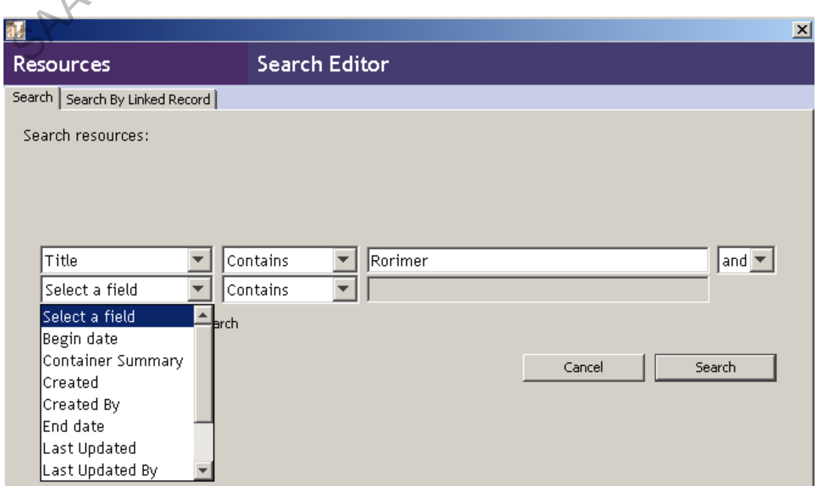
The command buttons in the **Menu/Command Zone** are fixed, and apply to whichever functional area in the **Navigation Zone** is selected. Double-clicking on a functional area will populate the **List Screen Display** with a list-view of associated records. The list screen display shows only select fields of each record (each column heading is a field). The list screen display is customizable, but should only be changed with the approval of a database administrator, as customization impacts every client, including those in different repositories.

Note that name and subject headings are shared among users, regardless of repository and access class. Accession, resource, and digital object records are restricted according to the user's repository setting. Only users set to an access class of 5 can view, search, and edit entries across repositories.

I.C. Searching and Filtering

Users may sort, search, and filter records in any of the five functional areas. With the list screen display loaded, records may be sorted A-Z or Z-A by clicking on the field heading .

To search records within any of the five functional areas, click on the functional area to highlight it, then click **Search** to open the search editor.



Select a field to search, specify the criteria, and enter a search term. One additional Boolean search term may be added. The drop-down list of fields is limited, but customizable. It should only be changed with the approval of a database administrator, as customization impacts every client, including those in different repositories. Once the search editor has been filled out, click **Search**. The results of the search will appear in the list screen display. Double-clicking on a record will open up the full data entry window.

Records in the list screen display, including those that are the result of a search, and in other areas of the AT, can be filtered by entering text into the **Filter search results** box. The filter only acts on fields of information that are included in the list screen display.

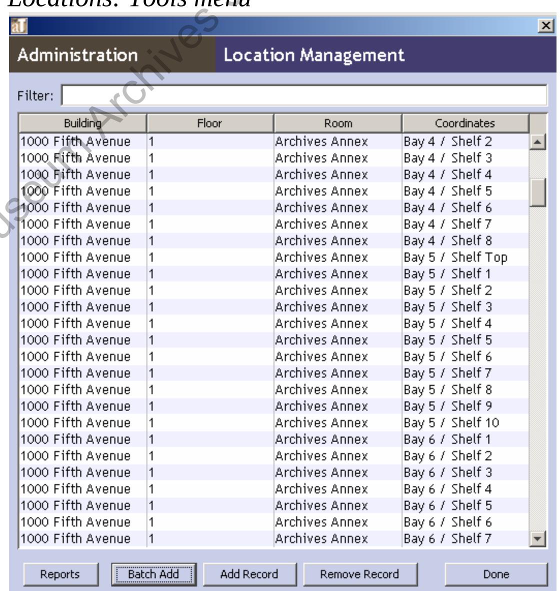
I.D. Saving Records

The Toolkit does not automatically save data. When exiting a data-entry window or tab, or amid working on lengthy narrative entries, it is good practice to click the save button., which appears at the bottom of the data entry window. In many cases the AT will prompt you to save when exiting windows, regardless of whether a change was made.

I.E. Locations

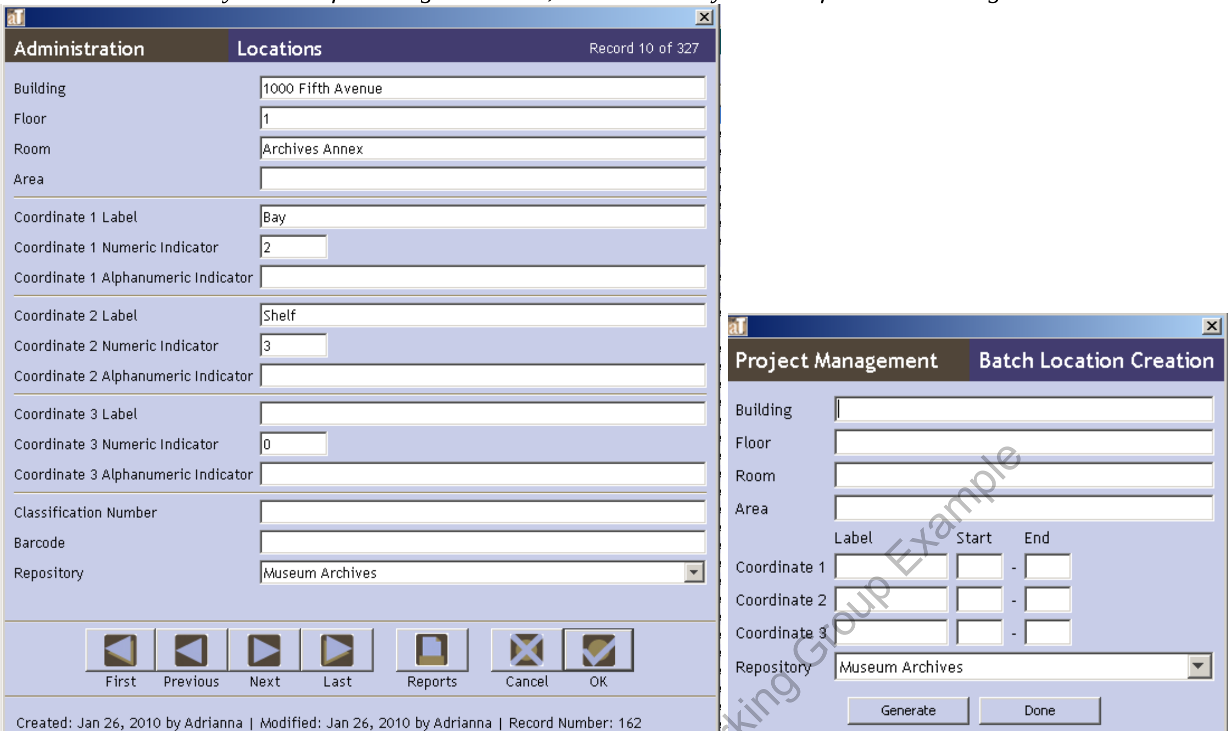
The AT tracks shelf locations for accessions only (not resources). Users with an access class of 4 or 5 can create new locations by clicking on **Create Location** on the locations lookup list within the accessions record. More location management options, such as **Batch Add** are available by going to **Locations** on the **Tools** menu. The following instructions pertain to this interface. Locations consist of several elements of information that progressively narrow to a shelf or drawer location: Building, Floor Room, and Coordinates. Coordinates are typically composed of a storage unit term and a part term, such as; Bay/Shelf, Filing Cabinet/Drawer, Flat File/Drawer, Bookcase/Shelf, Reading Room Cabinet/Shelf, Reading Room Safe/Shelf. Prior to adding locations to the AT, ensure that the storage space has been named and completely mapped and labeled.

Locations: Tools menu



Before adding a location, filter the list to ensure it has not already been entered. To delete a location, select it by clicking on it, and click **Remove Record**. To add a single location, click, **Add Record** and fill out the form as appropriate. Note that **Coordinate 3** is rarely used, and **Classification Number** and **Barcode** fields are not used. To add a series of locations, click **Batch Add**.

Locations: Data entry window for a single location; and data entry window for batch-adding locations



Batch adding enables the user to add a series of locations within a space quickly by inserting a range of numbers. Fill the form using first and last number of each coordinate in the **Start** and **End** fields and click **Generate**. The AT automatically generates individual records for each location within the range.

II. Names and Subjects (see *Resources: Names and Subjects Tab*)

It is typical that name and subject headings are entered into the AT through the accessions, resources, or digital objects functional areas as a part of the accessioning or processing workflow, rather than directly through the names or subjects functional areas. Name and subject heading entry is, therefore, not described independently, but addressed in the section of this manual devoted to the resources functional area.

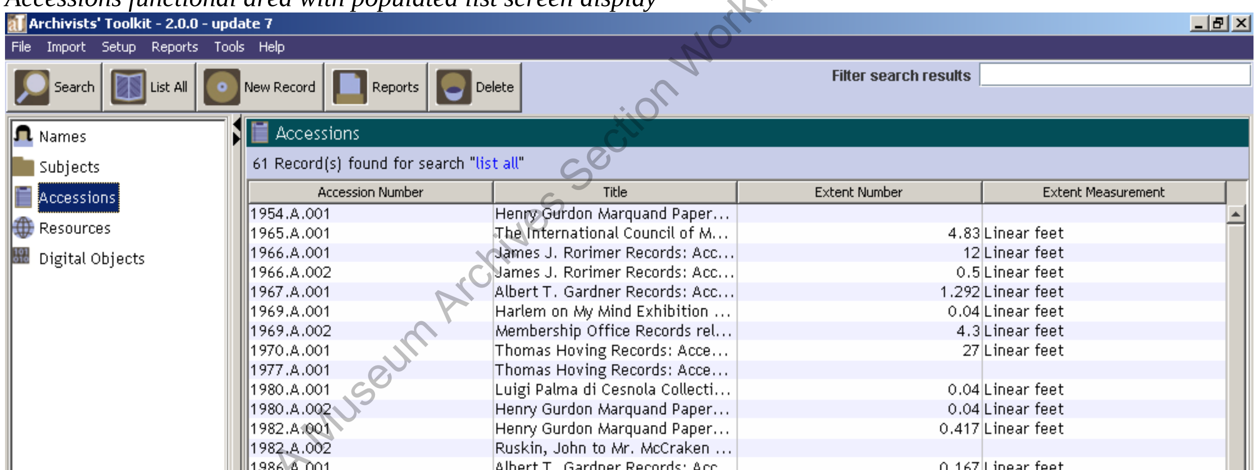
III. Accessions

Accessions are groups of documents from one source, acquired by the Archives at one time (in rare cases one document alone may constitute an accession). The accessions functional area is designed to establish basic, top-level physical and intellectual control over accessions for internal, administrative purposes. Accession records are not made public, since archival material is only made available after processing when a finding aid, rather than accession record, becomes the key point of discovery. Accession data should be captured for all new accessions as they enter the Archives. As collections are processed, resource records (commonly, collection records) are created in the resources functional area of the AT, wherein detailed arrangement and description information can be recorded (see *Resources*). As a result of processing, any given accession may result in one or more resources, or multiple accessions may combine to form one resource. The relationships between accessions and resources are tracked in the AT.

Note: During the spring of 2010, a survey was conducted to complete accession records for roughly twenty-five collections housed in the Archives Annex (resulting in about forty accession records). The bulk of the backlog of accessions was cataloged during this project, but additional distinct accessions or information pertaining to already-cataloged accessions may surface in the course of processing or day-to-day work.

Double-clicking on **Accessions** in the navigation zone will populate the list screen display with the accession number, title, extent number, and extent measurement.

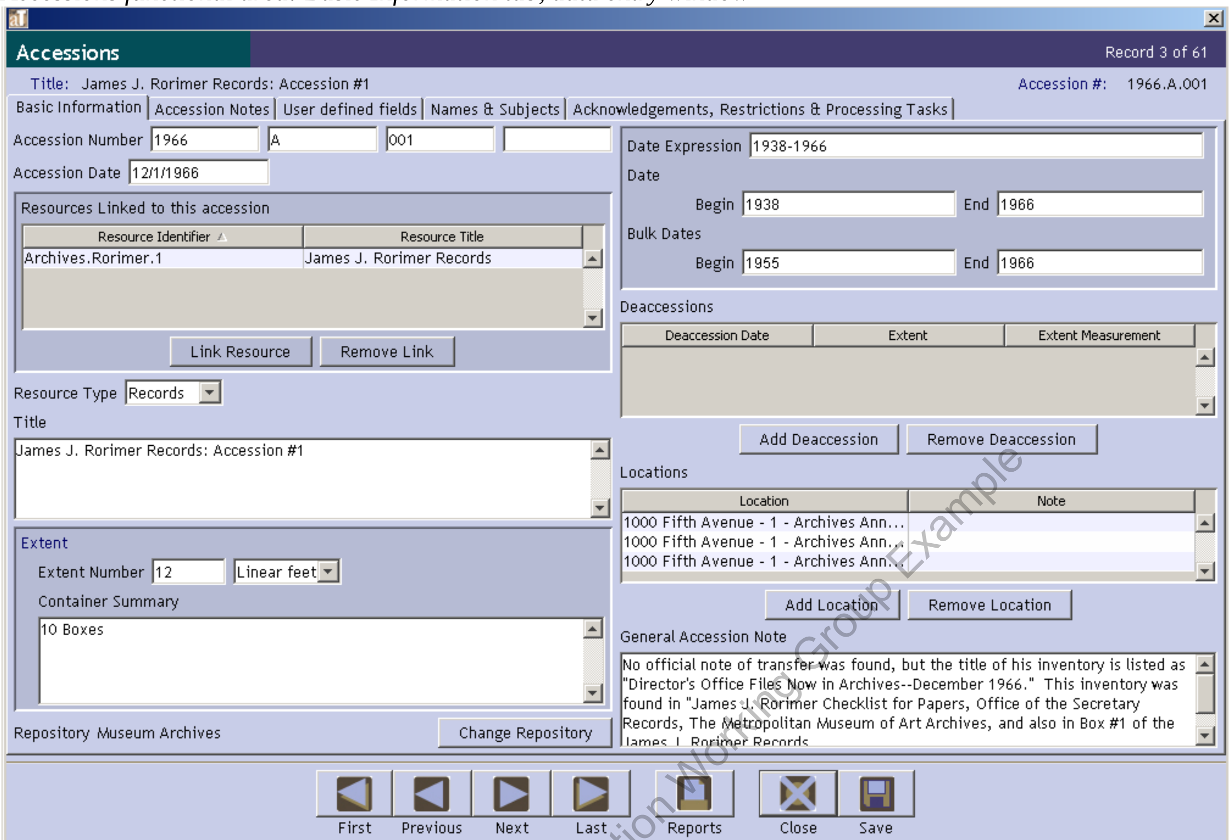
Accessions functional area with populated list screen display



Accession Number	Title	Extent Number	Extent Measurement
1954.A.001	Henry Gurdon Marquand Paper...		
1965.A.001	The International Council of M...	4.83	Linear feet
1966.A.001	James J. Rorimer Records: Acc...	12	Linear feet
1966.A.002	James J. Rorimer Records: Acc...	0.5	Linear feet
1967.A.001	Albert T. Gardner Records: Acc...	1.292	Linear feet
1969.A.001	Harlem on My Mind Exhibition ...	0.04	Linear feet
1969.A.002	Membership Office Records rel...	4.3	Linear feet
1970.A.001	Thomas Hoving Records: Acce...	27	Linear feet
1977.A.001	Thomas Hoving Records: Acce...		
1980.A.001	Luigi Palma di Cesnola Collecti...	0.04	Linear feet
1980.A.002	Henry Gurdon Marquand Paper...	0.04	Linear feet
1982.A.001	Henry Gurdon Marquand Paper...	0.417	Linear feet
1982.A.002	Ruskin, John to Mr. McCraken ...		
1986.A.001	Albert T. Gardner Records: Acc...	0.167	Linear feet

Double-clicking on an accession in the list screen display will open up the full resource record. Clicking **New Record** will open a blank accession record.

Accessions functional area: Basic Information tab, data entry window



Following is a data dictionary organized by each tab of information in an accession record: **Basic Information**, **Accession Notes**, **User Defined Fields**, **Names & Subjects**, and **Acknowledgements, Restrictions & Processing Tasks**.

Note about linking and generating resources: Accessions often transform into resources as a result of processing. The AT tracks such transformations by linking accession and resource records through the **Resources Linked to this Accession** field. Since some information in an associated resource is often the same as that in an accession record, a resource record can be generated from the accession record using the existing data (again, through the **Resources Linked to this Accession** field). Creating a resource through the accession record maps select accession record data to the same or different resource record fields. These fields can be edited in the resources functional area (without impacting entries in the accessions record). The resource record fields to which the accession record fields map are noted in italics in the **Field** cells of the data dictionary below.

Accessions: Basic Information

Field	Description	Examples	Mandatory?
Accession Number	The unique identifier for an accession within a repository. For Museum Archives, follow the format [year of accession].A.[three-digit sequential number within year]. For accessions with an unknown accession year, follow the format [year the accession was cataloged].A.[three-digit sequential number within year]*	1954.A.001; 1965.A.001; 2010.A.015*; 2010.A.016	Yes: system requirement.
Accession Date	The date the accession took place. If the date of an accession is unknown, enter the date the accession was cataloged in the AT and enter the note, "the transfer date of the records to the Archives is unknown," or any known information about the accession date in the **General Accession Note**.		Yes: system requirement.

Field	Description	Examples	Mandatory?
Resources Linked to this Accession	If an accession results in one or many resource records, link them by clicking **Link Resource**, selecting the resource or resources from the lookup list (use the filter box to narrow the list), and clicking **Link**. A resource record can be created, with a link to the accession record already established, by clicking **Create Resource** on the lookup list. If a resource is created in this way, the collection-level of the record will inherit the fields Title, Extent Number, Extent Measurement, Container Summary, Date Expression, Date Begin, Date End, Bulk Date Begin, Bulk Date End, Restrictions Apply, and Repository, linked names and subjects, a link to the accession. Description will map to Scope Contents, Condition to General Physical Description, Access Restriction Note to Conditions Governing Access Note, and Use Restriction Note to Conditions Governing Use Note. These fields can be edited in the resources functional area (without impacting entries in the accessions record). To remove a link, click on the resource record link entry and click **Remove Link**. Links are automatically established (or deleted) in the related resource record.		Required if related resources are present.
Resource Type	Term to categorize resource. Use **Records** for institutional records (museum or other), **Papers** for personal papers/manuscript collections, and **Collection** for artificial collections, or material from multiple creators. Customizable field.		Yes.
Title *Maps to Resources: Title*	Descriptive title of the resource, usually using the name of the creating organization, department, or person. If multiple accessions relating to the same resource (collection or record group) are present, the title can be appended with a number. If the accession contains a particular subject or genre of material, this can be indicated in the title.	Douglas Dillon Papers; Financial Records; George H. Story Daybook; Costume Institute Records: Accession #1; Costume Institute Records: Accession #2; Linda Wolk-Simon Provenance Research Project Records; Charles B. and Jayne Wrightsman Photographs of London Residence; Charles B. and Jayne Wrightsman Photographs of New York and Palm Beach Residences	Yes.

Field	Description	Examples	Mandatory?
Extent Number, Extent Measurement, Container Summary *Maps to Resources: Extent Number, Extent Measurement, Container Summary*	The shelf space occupied by the accession, in linear feet /Description of the container(s).	5 Linear feet/2 record cartons 5 document cases 1 folder	Yes. Either Extent Number or Container Summary.
Date Expression *Maps to Resources: Date Expression*	Inclusive range of the accession, as far as can be dertermined from quick survey of material. Years should always be writen in century format. If there is a gap of 5 years or less, use span dates; 6 or more, separate with a comma. When dates are unknown use n.d. When month and day or known, but year is not, use n.y. Put supplied dates, or parts of dates in brackets. Use a question mark when supplied dates are uncertain. Use the terms between, before and after as appropraite. Cerca dates are indicated with ca. See *Metropolitan Museum of Art Archives Processing Manual* for more detail, but spell out the month in the AT (physical folder notations permit abbreviations.)	1907 1877-1880 June 27, 1977 1910-1920, 1943 n.d January 5, n.y. [1997] [March 7?], 1922 [between 1957 and 1960] [before 1910] [after March 1920] [ca. 1860]	Yes.
Begin Date, End Date *Maps to Resources: Begin Date, End Date*	Century years of earliest and latest original item. If the span is no longer than one century year the begin and end dates are the same.	1886; 1916	Yes, when dates are known.
Bulk Date Begin, Bulk Date End *Maps to Resources: Bulk Date Begin, Bulk Date End*	Earliest and latest century years of the majority of materials in the accession. If the span is no longer than one century year the begin and end dates are the same.	1916	No, unless bulk dates are easily discernable and significantly different from inclusive dates.

Deaccessions	Records information about any material officially deaccessioned from the accession (does not include material weeded during processing). To create a deaccession record, click **Add Deaccession** and fill out the form with deaccession date, description, reason, extent, disposition, and notification and click **OK**. To delete a deaccession record, click on the record entry and click **Remove Deaccession**.		No. Only use if material has been deaccessioned.
Locations	Physical location of accession. To link to a location, click **Add Location**, select a location from the lookup list (use the filter box to narrow the list) and click **Link**. To add a note to that location instance to more accurately define the location of the material, enter text into the **Note/Container information** field at the bottom of the lookup list before clicking **Link**. To link multiple locations at once, select locations while holding down the **Ctrl** key, or click on the first consecutive location on the list, hold down the Shift key and click on the last consecutive location on the list, then click **Link**. To remove a location, click on the location entry and click **Remove Location**. Users with an access class of 4 or 5 can create new locations by clicking on **Create Location** on the lookup list. For information on creating locations, see "Locations" in the Overview section of is manual. Note that the **Batch Add** feature is only available by adding locations through the **Tools** menu, rather than the accession record.		Yes.
General Accession Note	A catch-all note for information that does not fit into a specified field. Especially used to clarify date and circumstances of acquisition.	Boxes transferred from CI at offices at various times during 2011 by Meghan Lee and Julie Le; bundled together to form this single accession September 2011.	No.

Accessions: Accession Notes

Field	Description	Examples	Mandatory?
Acquisition Type	Type of acquisition; transfer, gift, purchase, deposit.		Yes.
Retention Rule	Reason for acquisition.		No.

Field	Description	Examples	Mandatory?
Description *Maps to Resources: Scope Contents*	Narrative description of the creator, topic, and material in the accession, similar to an abstract.	James Joseph Rorimer (1905-1966) received his B.A. in Fine Arts from Harvard University in 1927, after which he came to The Metropolitan Museum of Art to serve as Assistant in the Department of Decorative Arts (1927-1929), Assistant Curator (1929-1932), Associate Curator (1932-1934), Curator in the Department of Medieval Art (1934-1955), and Curator of Medieval Art and The Cloisters (1938-1949). Rorimer briefly left the Museum in 1943 to join the United States Army, where he served as Lieutenant, Captain, and later as Chief of the Monuments, Fine Arts and Archives Section of the Seventh Army before returning to the Museum where he eventually became Director of The Cloisters and Curator of Medieval Art (1949-1966), and Director of The Metropolitan Museum of Art (1955-1966). The James J. Rorimer Records: Accession #2 contain documents created posthumously, including those related to internal notices and press releases about Rorimer's death, plans for Rorimer's funeral, the memorial service at The Cloisters, and correspondence with contributors and information about the James J. Rorimer Memorial Foundation.	No.
Condition *Maps to Resources: General Physical Description*	Note about the condition of the material in the accession, especially that which impacts access, processing, or supply purchasing.	This collection contains acidic folders and paper, metal fasteners, folded documents, bound material, oversized documents (such as legal-sized documents in letter-sized folders), sticky notes, clippings, three-dimensional awards (including a bust), loose photographs (some adjacent to acidic paper), and poorly-framed photographs. The items in Box 94 were relatively dusty, and the unframed large photograph in Box 95 is susceptible to damage due to the weight of the framed documents above it.	No.

Field	Description	Examples	Mandatory?
Inventory	Note the presence of any analog or digital inventory of the accession not cataloged in the AT.		No.
Disposition Note	Note about the final disposition of all or part of an accession (into multiple resources, for example, or collections not cataloged in the AT, like Office of the Secretary Records) if clarification is needed.		No.
External Documents	For URIs to link related electronic documents, such as inventories. To link to a document, click **Add Document**, and type in the document title and the file path and click **OK** or **+ 1** to add another link. To remove a document, click on the document entry and click **Remove Document**. To view a document, click on the document entry and click **Open in browser**.		No.

Accessions: User Defined Fields

User defined fields are customizable, but should only be changed with the approval of a database administrator, as customization impacts every client, including those in different repositories.			
Field	**Description**	**Examples**	**Mandatory?**
Accession Record Date	The date the accession record was created. May be different than the accession date.		Yes.
Languages	Languages represented in the collection. This note alerts processors to the presence and amount of foreign language material.		No.
Accession record Creator	User responsible for the creation of the accession record.		Yes.
Questions for Archivist	Used for survey project for intern to communicate questions and comments to the supervising archivist. These entries should be deleted after questions or issues have been resolved.		No.
Related materials	Points the archivist to related archival and published material that may assist in processing.		No.

Accessions: Names and Subjects

For linking name and subject heading entries see *Resources: Names and Subjects Tab*. *Maps to Resources: Names, Subjects*

Accessions: Acknowledgements, Restrictions & Processing Tasks

Field	Description	Examples	Mandatory?
Acknowledgement Sent/Date	Affirmation and date the formal letter of acknowledgement was sent to the source of the accession. Primarily used for acquisitions from outside the institution, rather than transfers.		No.
Agreement Sent/Date	Affirmation and date the terms of agreement were sent to the source of the accession. Primarily used for acquisitions from outside the institution, rather than transfers.		No.
Agreement Received/Date	Affirmation and date the approved terms of agreement were received from the source of the accession. Primarily used for acquisitions from outside the institution, rather than transfers.		No
Rights Transferred/Date	Affirmation and date the intellectual property rights were transferred from the source of the accession.		No.
Rights Transferred Note	Notes to explain terms or details of the transfer of intellectual property rights from the source of the accession.		
Restrictions Apply *Maps to Resources: Restrictions Apply*	Indication that access or use restrictions apply to all or part of the accession.		No.
Access Restrictions	Indication that access to all or part of the accession is restricted. Note that access to all unprocessed accessions is restricted to outside researchers, and limited to staff researchers pending item-level vetting. Once material in the accession has been processed, the access restriction is subject to change.		Yes.
Access Restrictions Note *Maps to Resources: Conditions Governing Access Note*	Narrative description of access restrictions that apply to all or part of the accession. Note that access to all unprocessed accessions is restricted to outside researchers, and limited to staff researchers pending item-level vetting. This field may also be used to draw attention to specific parts of the accession known to be subject to particular access restrictions. Once material in the accession has been processed, the access restriction is subject to change.	Closed pending processing. Files containing financial information in Box 1 are restricted. Requests for access will be reviewed by Archives staff on a case by case basis.	Yes.

Field	Description	Examples	Mandatory?
Use Restrictions	Indication that use restrictions apply to all or part of the accession, if known at the time of accession. Once material in the accession has been processed, the access restriction is subject to change.		No.
Use Restrictions Note *Maps to Resources: Conditions Governing Use Note*	Narrative description of use restrictions that apply to all or part of the accession, if known. Once material in the accession has been processed, the access restriction is subject to change.	Copyright restrictions apply. Consult Archives staff regarding permission to quote or reproduce.	No.
Processing Priority	Indication of priority level for processing the accession. Select high, medium, or low from drop-down list. List is customizable.		No.
Processors	Names of those assigned to, or responsible for processing, depending upon the status of the accession.		No.
Processing Plan	Notes relevant to processing the accession, including assignments, supply needs, and specific plans, can be recorded here. Also note any changes to original order that occurred from the time of accession, or actions that should be taken prior to processing.	Some of the loose letters are bundled together with rubber bands that are very close to breaking (due to their age and brittleness), so time-sensitive refoldering to keep the original organization is necessary.	No.
Processing Started Date	The date processing the accession began.		No.
Processing Status	The status of processing. Select “in progress,” “new,” or “processed” from the drop-down list. The list is customizable.		Yes.
Processed/Date	Affirmation and date of completion of processing.		No.
Cataloged/Date	Affirmation and date of completion of Watsonline record. Note that an accession may be one component of a resource, or one accession may be separated into multiple resources. This field may therefore not apply to accessions.		No.
Cataloged Note	Note about the Watsonline record for the accession, if one exists, including unique identifier.		No.

IV. Resources

The key purpose of the AT is to support the description of archival materials. As the AT manual states, "the resources function is where most of this description is captured. . . there you can enter physical or intellectual considerations, as well as contextual information about collection creators and topics." Eventually, the information input here by processors will be exported in various formats to provide the best possible access to materials.

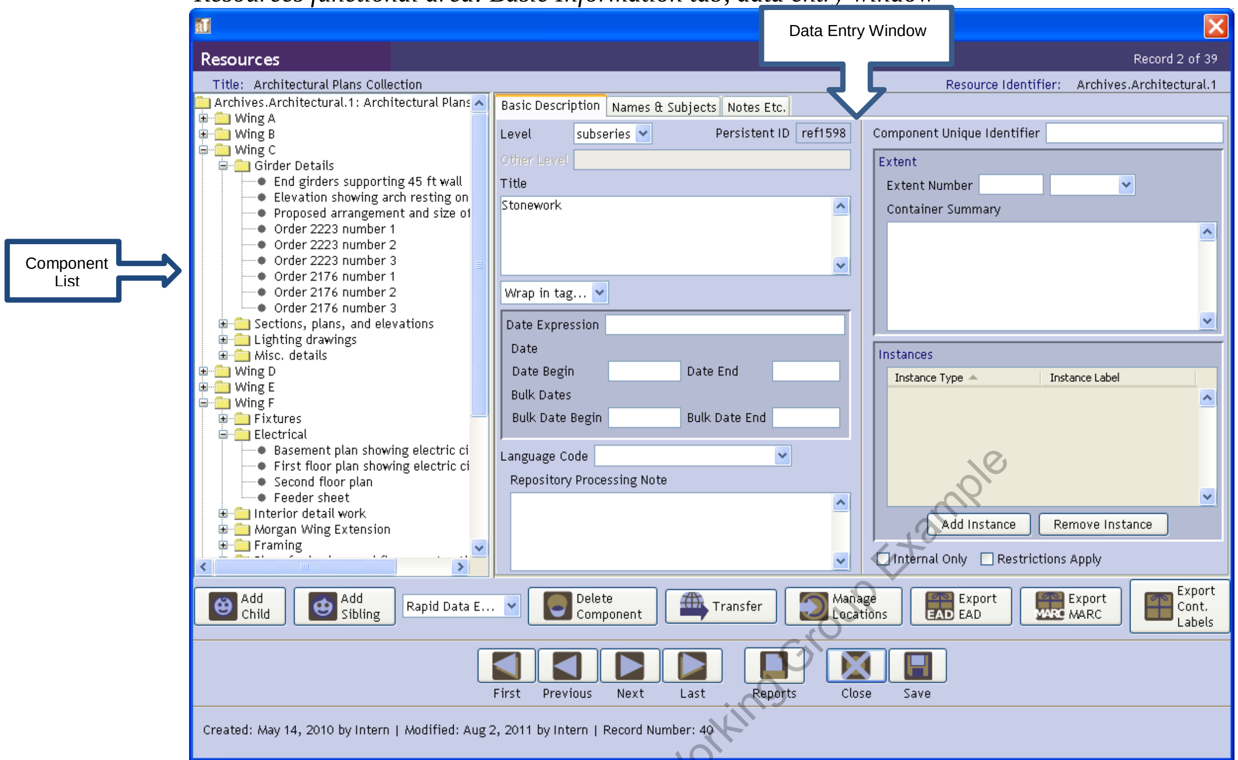
In the AT, archival material can be described by using two record functions: resource records and component records. The resource record is used most often to represent an entire collection, and, in special cases, a series or an individual item. Multi-level descriptions in the AT are achieved by the creation of component records within a resource record (e.g. a collection containing series, subseries, files, and items).

Double-clicking on **Resources** in the navigation zone populates the list screen display with the resource identifier, title, extent number, and extent measurement (the display fields are customizable by users with an access class of 5).

Resources functional area with populated list screen display

Double-clicking on a resource in the list screen display opens the full resource record. Clicking **New Record** opens a blank resource record.

Resources functional area: Basic Information tab, data entry window



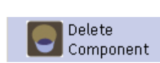
The **Component List** is an expandable/collapsible menu of a resource record's component parts (series, subseries, folders, items). The component list is used to build and navigate the hierarchy of a resource. The title is displayed in the component list for every record, resource and components. In the component list, a folder icon represents the resource, or any component which contains additional components (children). Components that have no related and subordinate components are represented with a bullet. To display the contents of a resource or component, click on the + to the left of a folder, and all of the components within it will display. To collapse the list, click on the - to the left of an open folder.

To display the **Data Entry Window** for a resource or component for editing or review, click on the title of the component in the component list. To reorder component records, simply select the component you wish to move, and drag-and-drop the component to a new position in the component list. Components can be moved within the same level of the hierarchy, or can be promoted or demoted to another level of the hierarchy.

Components can be created in two different ways using the buttons below the component list. With the resource tile, or any component selected in the component list, click;

to add a new component subordinate to the selected record, or click;

to add a component record on the same hierarchical level as the selected record.

To delete and component, select it, and click; 

Note that the delete button deletes the component and *all of its children*. The AT has limited abilities to retrieve lost or deleted information. Therefore, this button should be used with extreme caution. If you wish to delete the component but not its children you must drag-and-drop the children first so that they are no longer part of the component record.

IV.A. Data Entry Window

The **Data Entry Window** correlates with whichever component is selected in the component list. All components are described by the same set of fields, broken into categories by tab, with the exception of the highest level of the hierarchy, the resource record (most often, the collection-level). The resource record contains the additional tab **Finding Aid Data**. For the various records composing a resource, different fields may be used or omitted depending upon the hierarchical level (e.g., series, file, item) or physical contents of the component. For example, a collection record may include additional notes or name and subject headings, while file-level records may only include a title and date entries. Likewise, item-level records may include more fields relating to physical characteristics than the parent components.

IV.B. Item-Level Cataloging

Most commonly, collections are described to the file-level and no further. In special cases involving rare or special format materials, such as that which composes the *Architectural Plans Collection*, item-level cataloging is done as it dramatically improves access to and administrative control over such materials.

More commonly, item-level cataloging is done as a required step in a digitization project. The AT enables users to create **Digital Object** records from item-level records by migrating select fields of information from the item-level record to the digital object record by way of the **Instances** field. The digital object record fields to which the commonly-used item-level resource record fields map are noted in italics the **Field** cells of the data dictionaries for the **Resources** functional area. See *Digital Objects* for additional information on the Digital Object functional area.

Item-level cataloging note: An item can be one letter, pamphlet, clipping, etc. Attachments or enclosures constitute separate items, even if they are filed behind or within another item. Any given item may include multiple leaves or component parts. Item-level cataloging usually includes the fields: **Level**, **Title**, **Date Expression**, **Begin** and **End Dates**, **Language Code**, **Component Unique Identifier**, **Names**, **Language Note** (if needed), **Physical Facet Note**, and **Physical Characteristics and Technical Requirements Note** (if needed).

IV.C. Alternative Resource Record Work Flows

The AT only permits one user to work in any given resource record at a time, posing significant challenges to managing projects involving multiple processors. Additionally, the AT does not have built-in spellcheck, find-and-replace, or other word processing tools to assist in the editing process. Furthermore, it can be difficult to keep track of the presence of various descriptive notes, as many of these require several clicks to display. For these reasons, it is often preferable to create draft container lists in Microsoft Excel and narrative notes in Microsoft Word, and import and cut-and-paste these, respectively, into the AT after most of the editing work has been completed. For detailed instructions on importing container lists, see the *Archivists' Toolkit Inventory Import Tools: Instructions*. Using the *Import Tools* creates a new resource record. Existing resource records cannot be appended using this system. Therefore, it is advisable to import after the container list is complete. Also note that the *Import Tools* only imports lists into the title field (the default level is set to "file"). Any notes accompanying the container title can be cut-and-pasted to the appropriate notes field after import, and, likewise, box and folder numbers must be added after import.

The *Import Tools* provide a quick way to import container lists, but not box and folder numbers or any notes that may be used on the folder level, such as see-also references. Processors should consider using the AT's **Rapid Data Entry Screen** as an alternative to the *Import Tools* or regular data entry. Rapid data entry (RDA) is most effectively employed on the file level. To initiate RDA, select one of the customized screens from the RDA drop-down list below the component list on the data entry screen (currently, **Default** is the only option). The RDA consolidates frequently used fields on one data entry screen (like title, date, notes, and container—box and folder—entries), and enables the user to make entries in fields "sticky," or default from record to record (such as level or box number). To make fields sticky, hold down the Ctrl key and click the field label. To save and move on to the next record, click the **+1** button. When a series of records is complete, click **OK**. To create a new RDA screen configuration, go to **Setup** and select **Configure Rapid Data Entry Screens**, click **Add Record**, add the desired fields and click **OK**. All repositories share RDA screens, so consult with a database administrator before editing or deleting an existing RDA screen. Note RDA can only be used to add new records, not edit existing records. Therefore, RDA should only be used after folder arrangement has been completely finalized in order to take advantage of the time-saving box and folder number entry it enables. Users must be set at an access class of 3 or higher to create or edit RDA screens.

IV.D. Basic Description Tab

Following is a data dictionary organized by each tab of information in a resource record: basic description; names & subjects; notes, etc. & deaccessions; and finding aid data (which applies to the highest level of the hierarchy only). Examples pertinent to particular levels of hierarchy are noted in brackets.

Resources: Basic Description Tab

Field	Description	Examples	Mandatory?
Level	Label for the hierarchical level of material being described.	Collection; subgroups; series; subseries; file; and item. The drop-down value list cannot be modified.	Yes: system requirement.
Persistant ID	An unalterable system-supplied code unique to component parts.	ref159	Yes. System suppled (does not appear on resource records).
Title *Item-level field maps to Digital Object record.*	The title of the resource and any component part. The title of the resource (typically, collection) should be formulated in direct order, starting with the name of the collection's creator and followed by the type of material that the collection comprises. In the title, use *papers* for collections of personal and family papers; *records* for the archives of organizations or groups; and *collection* for groups of material brought together intentionally by a collector or the Archives. When appropriate, use a more specific or descriptive term (e.g., correspondence, diaries, autograph collection). Once a title is input, web formatting and behaviors can be added by highlighting sections and selecting tags from the **Wrap in Tag ...** drop-down list. Tagging should be kept at a minimum until web display issues are addressed by the Digital Media departmnet.	[Collection level] John Taylor Johnston Collection; Havemeyer Family Correspondence; Duveen Brothers Records. [Series or subseries level] Correspondence, Subjects, Research, Financial, Writings [Folder level] Dean, Bashford.; Development Committee.; Reorganization, Museum.; By-laws. [Item level] Letter from Mary Cassatt to the Havemeyers. Written on the same piece of paper is an undated letter from Joseph Wicht to Mary Cassatt.; Letter from W. Bode to Excellency.	Yes: system requirement.

Field	Description	Examples	Mandatory?
Date Expression *Item-level field maps to Digital Object record.*	Inclusive range of the collection, series, subseries, folder, or item's dates. Years should always be writen in century format. If there is a gap of 5 years or less within a folder, use span dates; 6 or more, separate with a comma. When dates are unknown use n.d. When month and day or known, but year is not, use n.y. Put supplied dates, or parts of dates in brackets. Use a question mark when supplied dates are uncertain. Use the terms between, before and after as appropraite. Cerca dates are indicated with ca. See *Metropolitan Museum of Art Archives Processing Manual* for more detail, but spell out the month in the AT (physical folder notations permit abbreviations.)	1907 1877-1880 June 27, 1977 1910-1920, 1943 n.d January 5, n.y. [1997] [March 7?], 1922 [between 1957 and 1960] [before 1910] [after March 1920] [ca. 1860]	Yes: system requirement when inclusive dates are not included.
Begin Date, End Date *Item-level fields map to Digital Object record.*	Begin date: century year of earliest original item that the particular level is describing. End date: century year of latest original item. If the span is no longer than one century year the begin and end dates are the same.	1916 1886	Yes: system requirement when date expression is not provided. If a begin date is used, an end date is required.
Bulk dates (begin/end)	The earliest and latest century years of the majority of materials being described. If the span is no longer than one century year the begin and end dates are the same.	1916	Yes, on the collection level when bulk dates are present. If a begin date is used, an end date is required.
Language Code *Item-level field maps to Digital Object record.*	Predominent language of the material. Select from the drop-down list. The list is not customizable. If the language code is not sufficiently descriptive expand using the Language of Materials note. resource. *Hint: In order to avoid scrolling down through the list of languages, you can type, e.g., "eng" in the text field and English will populate the box.*		Yes: system requirement on the collection-level.

Field	Description	Examples	Mandatory?
Repository Processing Note	Internal note relating to processing. This is an adminsistrative field and does not print to the finding aid. The note is useful during an ongoing processing project to collaborate with other processors or supervisors, or to leave follow-up notes. After issue is resolved, delete the entry in this field.	Originally in annex cabinet. Add subject headings to this series. Possible see-also reference? Review folder entries in this series. Follow up with preservation photocopying.	No.
Resource Identifier	Unique code for the resource using three of the component fields in the following format [Repository] [Resource keyword] [Consecutive number if more then one resource with the same repository and resource keyword]	Archives.Havemeyer.1 Archives.ICOM.1 Archives.Harlem.1 Archives Harlem.2 Cloisters. Brummer.1	Yes: system requirement on the collection-level (does not appear on component records).
Accessions Linked to this Resource ID	This is not a data entry field, but indicates accessions to which the resource is linked. Links are created through the **Resources Linked to this Accession** field in the **Accessions** functional area.		
Component Unique Identifier	Consecutive item number within the folder.	Item 1 Item 2	No. Only use on the item level. (does not appear on resource records)
Extent	A description of the physical quantity of the material described. Size is typically described in linear or cubic feet.	3 linear feet.	Yes: system requirement on collection-level.
Container Summery	Enumerated list of containers and container types housing the resource materials.	6 boxes. 3 record cartons.	Yes, on the collection and series and subseries levels.

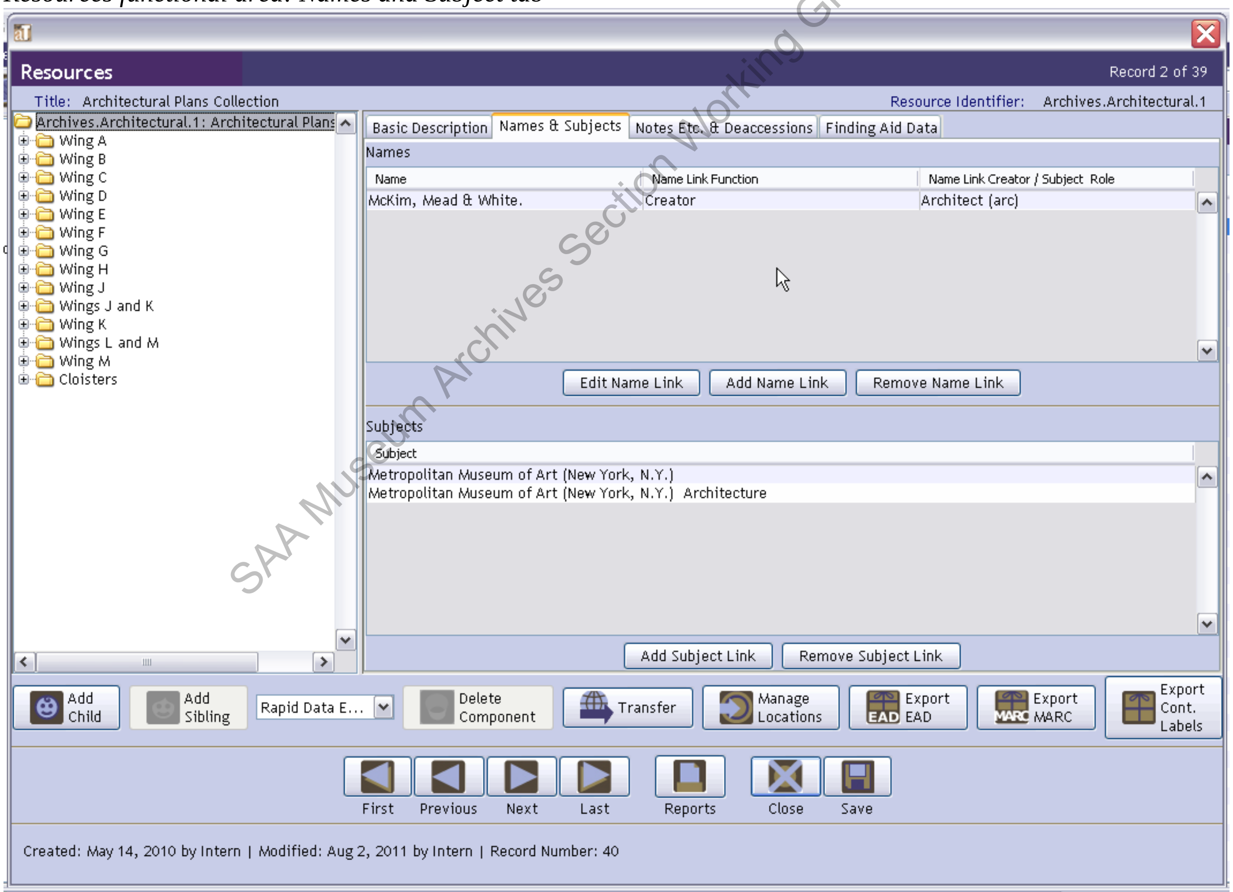
Field	Description	Examples	Mandatory?
Instances	Usually used to record media in which content described in record is contained (most often, box and folder numbers). To add box and folder numbers, click **Add Instance**, and select **Mixed materials**. In **Container 1Type** select **Box** from the drop down list (or as appropriate), and then indicate the appropriate box number in **Container 1 Indicator** (**Container Barcode** not used). In **Container 2 Type** select **Folder** from the drop down list (or as appropriate), and then indicate the appropriate folder number in **Container 2 Indicator**. Then click **OK** to save. To remove an instance, click on the instance and click **Remove Instance**. Note: box/folder numbers should be added at the very end of processing/data entry. Digital objects (e.g., scan of a document) are linked through the instances interface as well, usually on the item-level. To create or link a digital object, click **Add Instance**, and select **Digital object,** or **Link digital object**, respectively, and click **OK**. See *Digital Objects* for additional information on the Digital Object functional area.		Yes, box and folder numbers are typically required on the folder level, with some variations and exceptions.

IV.E. Names and Subjects Tab

Name and subject headings can be associated with accessions, any level of description of a resource, and digital objects. Most often, name and subject headings are applied on the collection-level of a resource record, and on the item level of a resource record or digital object (for creator). It is typical that headings are created as part of cataloging resources or digital objects, rather than as an independent task. Therefore, instructions for creating headings through the name and subject funtional areas are not included in this manual. The following instructions pertain to creating headings on the collection-level of a resource record, and can be extrapolated to creating headings in component parts, or accession, or digital object records. It is generally sufficient to apply around five each of the most representitive name and subject headings to each collection. A name heading for the collection creator is manditory.

When adding names or subject headings, use authorized headings whenever possible. These establish standardized access points to archival material. Library of Congress authority records (NACO. http://authorities.loc.gov/) are preferred. If a name or subject heading is not listed by the Library of Congress, search Watsonline. The following authorites may also be useful: Union List of Artist Names (ULAN. http://www.getty.edu/research/tools/vocabularies/ulan/index.html), Getty's Art & Architecture Thesarus (AAT. http://www.getty.edu/research/tools/vocabularies/aat/) Thesaurus of Geographic Names (TGN: http://www.getty.edu/research/tools/vocabularies/tgn/).

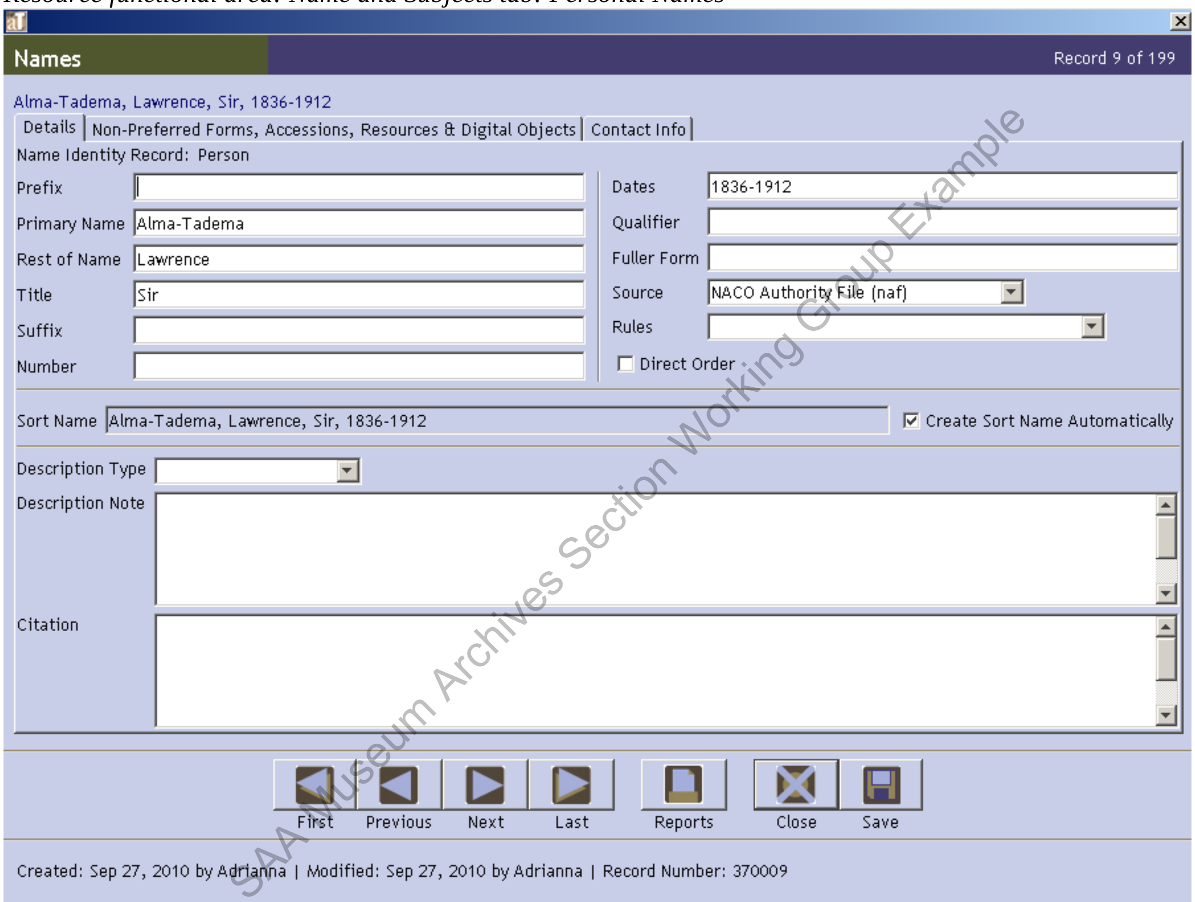
Resources functional area: Names and Subject tab



To add a name link, go to the **Names and Subjects** tab and click **Add Name Link**. A new window will open called **Name Lookup** where you can scroll through or filter a list of names previously entered into the AT. If the name you wish to add appears on the list, highlight to select it and you will be required to select a **Function** from the drop-down list on the lower left of the window. Select **Creator, Source,** or **Subject** as appropriate. **Creator** should be used to designate the person or organization that produced (in the course of his/her/its activities or by collecting) the collection or item being described. After selecting a **Function**, click the **Link** button.

If the name did not appear in the name lookup list, click the **Create Name** button. A new window will open that asks the type of name you would like to create. Select either **Person, Corporate Body**, or **Family** from the drop-down list and click **OK** (each name type has different fields). If you select **Person** the following screen will appear:

Resource functional area: Name and Subjects tab: Personal Names



After filling out the fields per the instructions below, click **OK**. The name window will close and you will return to the **Name Lookup** window where the new entry appears highlighted. Select the appropriate **Function** and **Role** from drop-down list and click **Link** and **Close Window**.

Following is a data dictionary for the fields the **Details** tab for personal name, family name and corporate name records (the other tabs are the same for each name type) followed by the **Non-Preferred Forms, Accessions, Resources & Digital Objects**; and **Contact Info** tabs, which are the same for each name type. If the record is based on an existing authority, enter the fields of information as appropriate. The **Sort Name** display (which concatenates entries into the fields) should exactly match the authority. The fields noted as mandatory in the data dictionary are those that are required, at minimum, for a local entry. Local entries should be based upon the fullest known form of the name. (Note that authorizes names are not always the fullest form. No additional parts should be added to an authorized name).

Name Record: Personal Name: Details tab

Names on the item-level map to Digital Object record.			
Field	**Description**	**Examples**	**Mandatory?**
Prefix	Prefix of name.	Mr.; Ms.; Miss; Mrs.	No.
Primary Name	Surname.	Smith	Yes: system requirement.
Rest of Name	First name.	John	No.
Title	Title preceeding name.	Sir; Chief; President	No.
Suffix	Qualifying term that follows the name.	Jr.; Sr.	No.
Number	Roman numeral or roman numeral and part that is part of a personal name.	II.	No.
Dates	Birth and death dates	1880-1943	No. Note: do not add death dates to names when only a date of birth appears in the authorized form.
Qualifier	A term, such as geographical, to distinguish one name from another.	Bronx, New York.	No.
Fuller Form	For full parts of names represented by initials.		No.
Source	The origin of the entry's syntax. Select from the drop-down menu.	Most common examples would be: Local Sources (local) or NACO for names found in Library of Congress authority files.	Yes. system requrement.
Rules	The standard associated with the source.	Select from drop-down list. Local (local) for a local source entry and Anglo-American Cataloging rules (aacr) for NACO autority files	Yes. Make sure the rule entry matching the source entry correctly.
Direct Order	Click the checkbox if the elements of the name are to appear in direct, or natural order rather than inverted order.		No.
Description Type	If **Description Note** is used, select the type of description from the drop-down list (Administrative history for corporate names and biography for personal or family names).		No.

Names on the item-level map to Digital Object record.			
Field	**Description**	**Examples**	**Mandatory?**
Description Note	Brief administrative history of corporate entity or biography for personal or family name		No.
Citation	Citation of source(s) used to establish a local name or the the **Desctription Note** of an authorized or local name.		No.

Name Record: Family Name: Details tab

Field	Description	Examples	Mandatory?
Family Name	Surname of family	Havemeyer; Johnston	Yes: system requirement.
Prefix	A term associate with the family name.		No.
Qualifier	A term, such as geographical, to distinguish one name from another.	Bronx, New York.	No.
Source	The origin of the entry's syntax. Select from the drop-down menu.	Most common examples would be: Local Sources (local) or NACO for names found in Library of Congress authority files.	Yes: system requrement.
Rules	The standard associated with the source.	Select from drop-down list. Local (local) for a local source entry and Anglo-American Cataloging rules (aacr) for NACO autority files	Yes. Make sure the rule entry matching the source entry correctly.
Sort Name	The entry lists out in this field based upon the fields used. When the Create Sort Name Automatically box is unchecked, the user may override the default order. Typically, the checkbox is left at the defaout setting (checked).		No.

Name Record: Coporate Name: Details tab

Field	Description	Examples	Mandatory?
Primary Name	The primary name by which a corporate body is known.	Curtis Lighting (Firm)	Yes: system requirement.
Subordinate 1	Name of organizational unit within primary name (espacially used with government agencies)		No.
Subordinate 2	Name of additional organizational unit within primary name (espacially used with government agencies)		No.

Field	Description	Examples	Mandatory?
Number	Number of a part, section, or meeting.		No.
Qualifier	A term, such as geographical, to distinguish one name from another.	Bronx, New York.	No.
Source	The origin of the entry's syntax. Select from the drop-down menu.	Most common examples would be: Local Sources (local) or NACO for names found in Library of Congress authority files.	Yes: system requrement.
Rules	The standard associated with the source.	Select from drop-down list. Local (local) for a local source entry and Anglo-American Cataloging rules (aacr) for NACO autority files	Yes. Make sure the rule entry matching the source entry correctly.
Sort Name	The entry lists out in this field based upon the fields used. When the Create Sort Name Automatically box is unchecked, the user may override the default order. Typically, the checkbox is left at the defaout setting (checked).		No.

Name Record: Non-Preferred Forms, Accessions, Resources & Digital Objects tab

Field	Description	Examples	Mandatory?
Non-Preferred Forms	Consider linking a non-preferred name to any authorized or local names that have alturnative forms differing significantly enough from the primary entry to warrant an alternate entry. To link a non-preferred name, click **Add Non-Preferred Form**, fill out the fields and click **OK**. To delete a non-preferred name from a main entry, select the entry and click **Remove Non-Preferred Form**.		No.
Accessions; Resources; Digital Objects	These are not data-entry fields, but display windows for records linked to the name.		N/A.

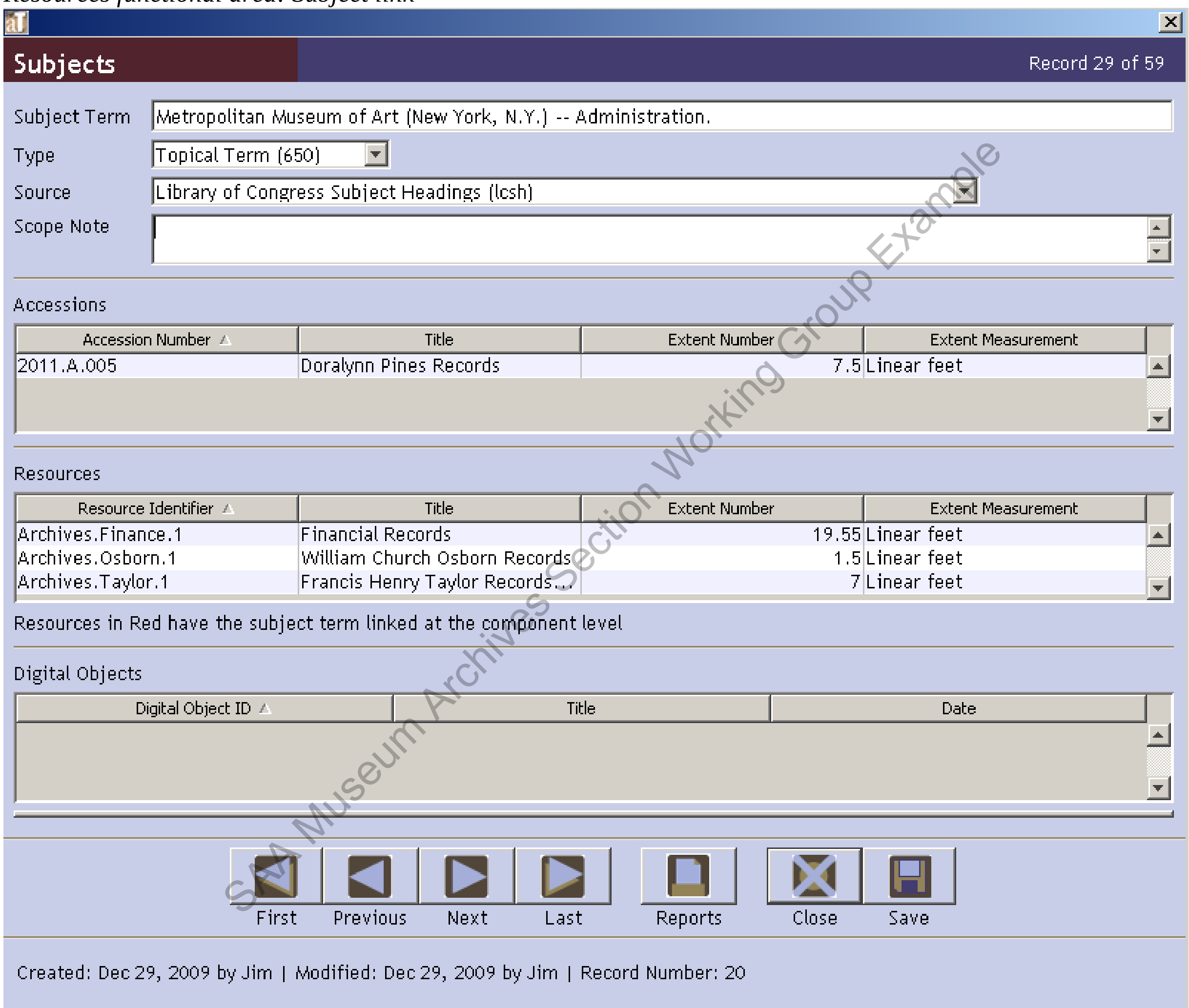
Name Record: Contact info tab

This set of fields is used to contain contact information associated with any name entry for administrative purposes. At present, this tab is not used.

To add a subject link, go to the **Names and Subjects** tab and click **Add Subject Link**. A new window will open called **Subject Term Lookup** where you can scroll through or filter a list of subject headings previously entered into the AT. If the heading you wish to add appears on the list, select it and click the **Link** button.

If the subject heading did not appear in the subject term lookup list, click the **Create Subject** button for a blank **Subjects** data entry window.

Resources functional area: Subject link



After filling out the fields per the instructions below, click **OK**. The subject heading window will close and you will return to the **Subject Term Lookup** window where the new entry appears highlighted. Click **Link** and **Close Window**. Following is a data dictionary for the fields the subject heading record

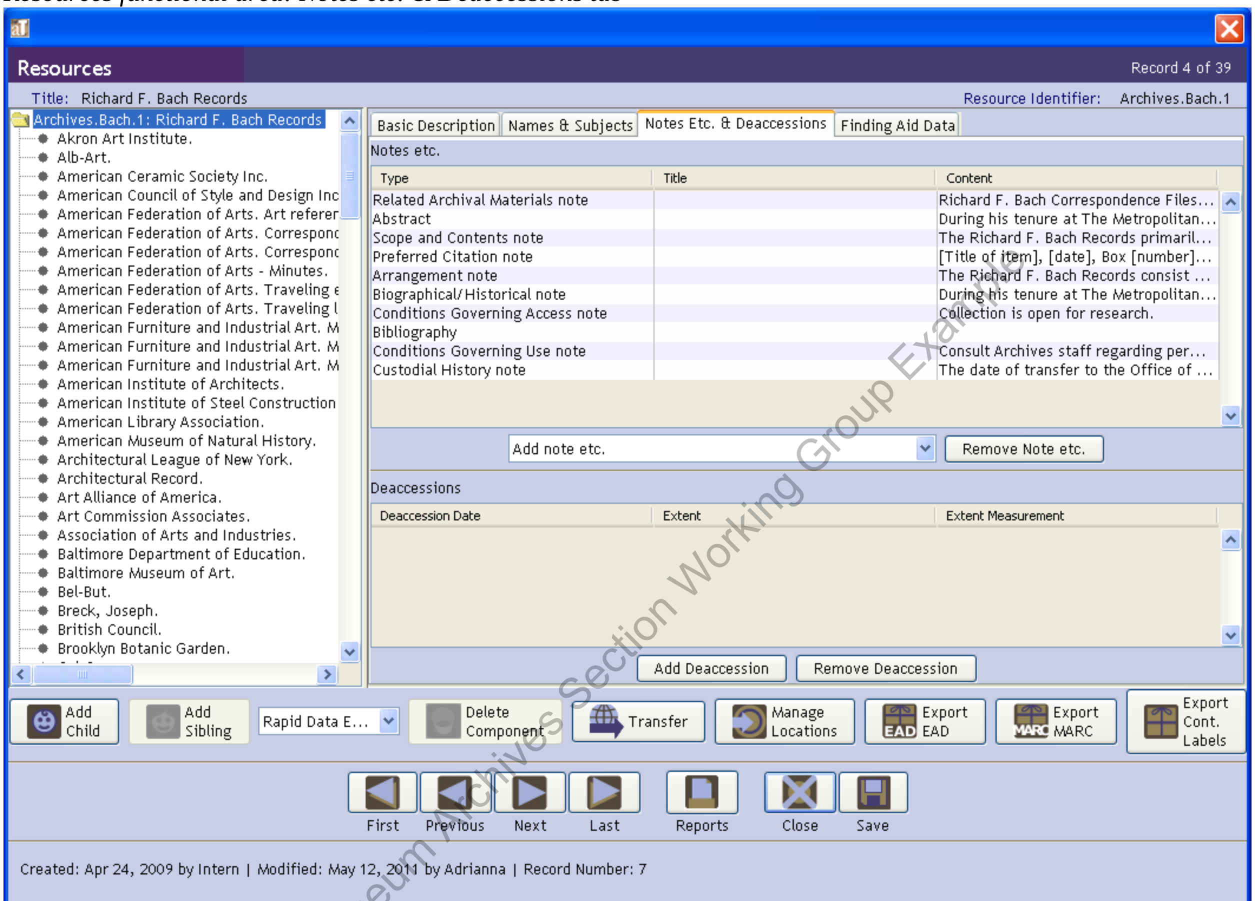
Subject Record

Field	Description	Examples	Mandatory
Subject Term	A descriptor for indicating the content or type of a resource.	Art--Collectors and collecting--United States.; Havemeyer, Louisine Waldron Elder--Art collections	Yes: system requirement.
Type	Indicator for expressing the type of category of a subject term. Select from the drop-down list.		Yes: system requirement.
Source	An indication of the authority of the term, i.e. in what list of authority headings it appears.	Select from the drop-down list. Common examples would be: Library of Congress Subject Headings (lcsh); Local sources (local)	Yes: system requirement.
Scope Note	A field for indicating how a subject term is to be applied in a specific implementation of the AT. Primarily to support the use of local subject terms.		No.
Accessions; Resources; Digital Objects	These are not data-entry fields, but display windows for records linked to the name.		N/A.

IV.F. Notes etc. & Deaccessions Tab

This tab is the data entry point for several very important fields of descriptive information that may be added at either the resource or component level. Deaccessions may only be recorded on the resource level, and this feature is, therefore, only available on the resource level and not in component parts, where the tab is simply labled, **Notes etc.**

Resources functional area: Notes etc. & Deaccessions tab



To add a note, select it from the drop-down list. A data-entry screen will appear with standard fields: a checkbox for **Internal Only** (for suppressing the note from printing to the finding aid), **Note Label** (to change the label that prints to the finding aid for that particular note. Only the label changes. All else about the note is managed according to the type of note) , and **Note Content** for the narrative body of the note. Once a note is input, web formatting and behaviors can be added by highlighting sections and selecting tags from the **Wrap in Tag ...** drop-down list. Tagging should be kept at a minimum until web display issues are addressed by the Digital Media departmnet. Following is a data dictionary for commonly used notes.

Resources functional area: Notes etc. & Deaccessions tab[typically used fields]

Field	Description	Examples	Mandatory?
Deaccessions	Note any material that was deaccessioned from the collection. To add a deaccession note, click **Add Deaccession** and fill out the fields**, Deaccession D**ate, **Description** (description of materials deaccessioned), **Reason** (justification for deaccession), **Extent** (usually in linear feet), **Disposition** (what was done with deaccessioned materials) and **Notification** (check box to indicated that the source of the materials has been notified of the deaccesison) and click **OK**. To delete a deaccession record, click on the deaccession record and click **Remove Deaccession**.		No (does not appear on component records).
Abstract	Brief summary of the collection, consisting of defining biographical or historical information about the creator and abridged statement about the scope and content of the collection. Its purpose is to help readers to quickly identify materials that may be pertinent to their research. Whenever possible, formulate the abstract by combining the first sentences or two of the biographical/ historical note and the scope and content note.	During his tenure at The Metropolitan Museum of Art, Richard F. Bach served as Associate in Industrial Arts (1918-1929), Director of Industrial Relations (1929-1941), Dean of Education and Extension (1941-1949), and Consultant in Industrial Arts (1949-1952). Bach championed the collaboration of museums and the industrial arts, working extensively with manufacturers, industrial designers, and educational institutions. In addition to his work at the Museum, Bach was a member and leader of a number of arts and education organizations as well as a prolific writer and lecturer. The Richard F. Bach Records primarily contain correspondence, meeting minutes, and pamphlets related to Bach's activities as Director of Industrial Relations, Dean of Education and Extension, and Consultant in Industrial Arts. The majority of the correspondence is professional in nature and concerns Bach's role as liaison between The Metropolitan Museum of Art and industrial designers, manufacturers, educators, and arts organizations.	Yes, on the collection level only.

Field	Description	Examples	Mandatory?
Arrangement Note	Describes the various aggregations of archival materials, their relationships, or the sequence of documents within them.	The Richard F. Bach Records consist of a single series arranged alphabetically by corporate name, personal name or subject.	Yes, on the collection level. Use as needed on series and subseries levels.
Biographical/ Historical Note	On the collection-level, the Bio/Hist note is a concise narrative that places the collection in context by providing information about its creator(s). Include significant information about the life of an individual or family or the administrative history of a Museum department, focusing on the period or activities covered by the materials described. The historical note should not be an attempt at a definitive biography or organizational history. In most cases, one or two paragraphs should suffice, and only in exceptional circumstances should this note exceed two pages. For well-known creators, be as brief as possible and refer readers to published biographical sources at the end of the note. Do not hesitate to borrow extensively from short-form biographies or histories from established Museum sources such as departmental histories included on the Museum web site. The first sentence or two should be able to stand alone, identify the creator of the collection, and be used in the collection abstract. More detailed biographical or historical information that provides context for a particular series or subseries should be included in the scope or historical note for that series or subseries. Do not use footnotes; credit your source(s) at the end of the historical note in section titled "Sources." Books and articles should be listed in bibliographic format according to *The Chicago Manual of Style*. When citing websites, include the date you consulted the site. On the series or subseries level, use this note to describe a group of records within the collection created by a particular person, organization, or corporate body, such as	<blockquote><p>During his tenure at The Metropolitan Museum of Art, Richard F. Bach served as Associate in Industrial Arts (1918-1929), Director of Industrial Relations (1929-1941), Dean of Education and Extension (1941-1949), and Consultant in Industrial Arts (1949-1952). Bach championed the collaboration of museums and the industrial arts, working extensively with manufacturers, industrial designers, and educational institutions across the United States. In addition to his work at the Museum, Bach was a member and leader of a number of arts and education organizations including the American Federation of Arts, the Architectural League of New York, and the Advisory Board on Vocational Education of the New York Board of Education. Bach was also a prolific writer and lecturer. He published several articles concerning American industrial art and a book entitled <emph render="italic">Museums and the Industrial World</emph> (1926). </p></blockquote> <blockquote><p>Richard F. Bach was born in 1888. He graduated from Columbia University in 1908 and during 1909-1919 was an instructor and curator at Columbia's School of Architecture. In 1918, Bach was appointed Associate in Industrial Arts at the Metropolitan Museum of Art. . .	Yes, on the collection level. Use as needed on series and subseries levels.

Field	Description	Examples	Mandatory?
	a committee or department. The note should be a concise narrative that places the archival materials in the series or subseries in context by providing information about their creator. It should focus on the period or events documented by the materials described. This note should not, except in exceptional circumstances, exceed a paragraph in length.		
Scope and Contents Note	The purpose of the collection-level scope and contents note is to enable users to judge the potential relevance of the collection to his/her research. It should describe the collection's contents with sufficient detail to provide the researcher with a good understanding of the collection's general characteristics and strengths. While you should point out remarkable gaps in the record presented by the collection, you should concentrate on describing what is in the collection rather than what is not. Except in the case of very large collections, the scope note should be no longer than one page. The scope note should begin with an account of the types of material in the collection and a general statement about what the collections documents. As with the Biographical/historical note, the first sentence or two should stand alone as a description of the collection to be used in the abstract. The series scope note should describe the types of material and the subjects and activities documented by the series or subseries. It should also relate the (sub)series to the rest of the collection or series. It should not simply repeat information found in higher level descriptions (such as the collection scope and contents note) or in the container list; rather, it should supplement this descriptive information. This note should seldom exceed a paragraph in length.	The Richard F. Bach Records primarily contain correspondence, meeting minutes, and pamphlets related to Bach's activities as Director of Industrial Relations, Dean of Education and Extension, and Consultant in Industrial Arts. The material spans the period of 1913-1953, but the bulk dates from 1939-1953 when Bach served as Dean and Consultant. Additional items in the collection include printed material, newspaper articles, radio broadcast transcripts, and photographs. The majority of the correspondence concerns Bach's role as liaison between The Metropolitan Museum of Art and industrial designers, manufacturers, educators, and arts organizations. There is a significant amount of material related to Bach's involvement in rehabilitation and occupational therapy, the National Council on Design Protection, the American Federation of Arts, the Cooper Union for the Advancement of Science and Art . . .	Yes, on the collection level. Use as needed on series and subseries levels.

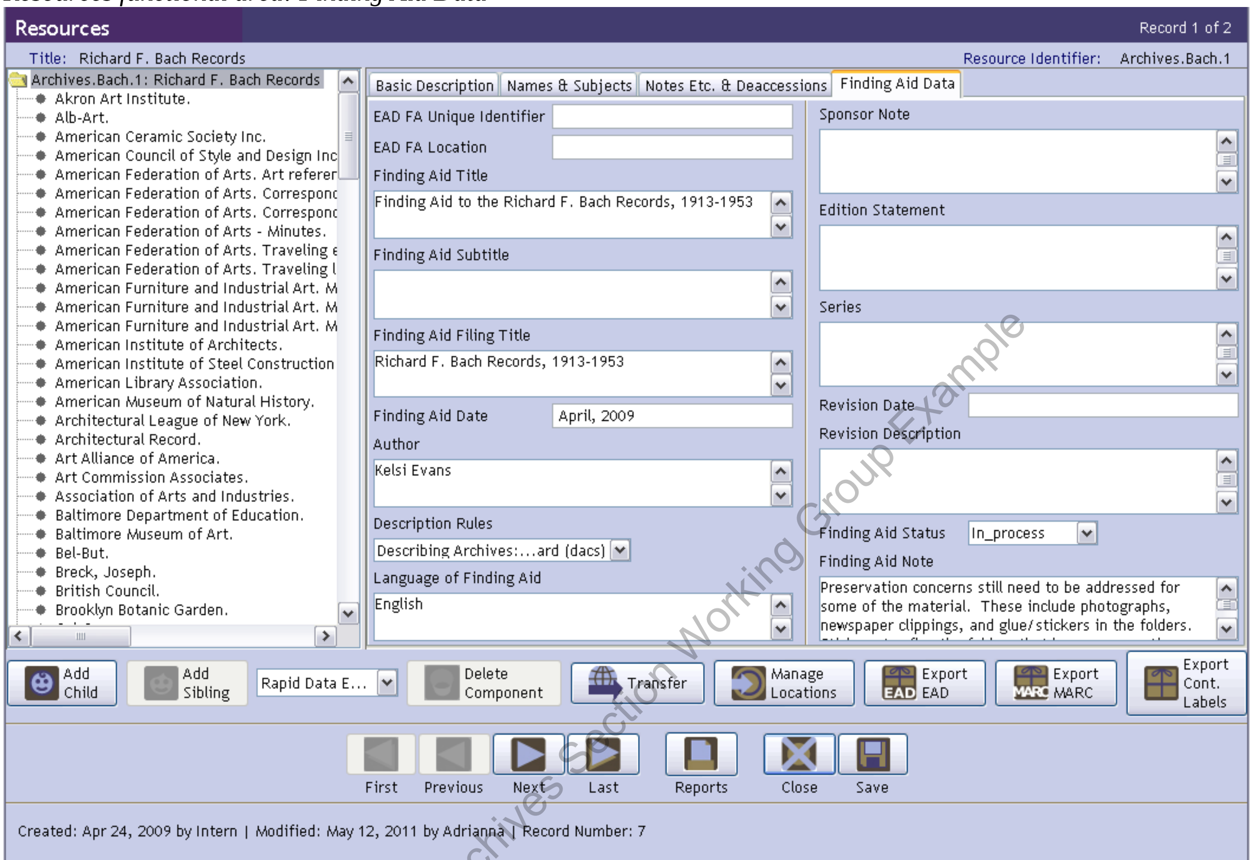
Field	Description	Examples	Mandatory?
Related Materials Note	Identify other archival collections held by the Museum, or by other institutions, that are related by topic and might be of research interest to scholars. Use also in cases where a collection has been split between two or more repositories. Do not use in cases where only a few letters of a particular creator can be found elsewhere.	Richard F. Bach Correspondence Files, Office of the Secretary Records, The Metropolitan Museum of Art Archives.	No. Use on collection level only as appropriate.
Preferred Citation Note	Format: [Title of item], [date], Box [number], Folder [number], [Collection title], The Metropolitan Museum of Art Archives.	[Title of item], [date], Box [number], Folder [number], Richard F. Bach Records, 1913-1953, The Metropolitan Museum of Art Archives.	Yes, on the collection level.
Bibliography	List of published sources of information related to the records being described. Bibliographies can be titled, and notes added, or these fields can be left blank and standard bib records entered by clicking **Add Item**, entering text into the **Item Value** field, and clicking **OK**. Bibliographic entries can be deleted by selecting the entry and clicking **Remove Item**. Once a **Note** or **Item Value** entry is input, web formatting can be added by highlighting sections and selecting tags from the **Wrap in Tag ...** drop-down list. Tagging should be kept at a minimum until web display issues are addressed by the Digital Media departmnet.	Howe, Winifred. <emph render="italic">A History of the Metropolitan Museum of Art: 1905-1941.</emph> New York: Columbia University Press, 1946.	No. Use anytime, and on any level where outside works are consulted in the composition of a bio/hist note.
Conditions Governing Access Note	Special rules or provisions that affect the availability of the records, such as parts of collections that are closed or that must be consulted in other formats (i.e. microfilm, photocopies, publications). When there are no such conditions, the standard access note should read "Collection is open for research."	Collection is open for research.	Yes, collection level.
Conditions Governing Use Note	Conditions that affect use of the collection after access has been granted, such as publication rights or reproduction restrictions. Also note any available information found regarding copyright holders.	Consult Archives staff regarding permission to quote or reproduce.	Yes, collection level.

Field	Description	Examples	Mandatory?
Custodial History Note	Names of individuals, organizations or Museum departments from which the records were received; the method of acquisition (typically Gift, Bequest, Purchase or Transfer); and the month/year received.	The date of transfer to the Office of the Secretary is unknown.	Yes, collection level.
Language note *Item-level field maps to Digital Object record.*	When language code (on basic description tab) is not sufficiently descriptive, expand using this note.	English and Italian.	No. Only use when language code is not sufficiently descriptive.
General Note	Notes about the contents of afile, such as genre of the materials, prominent or significant subjects not expressed the file title, or the presence of valuable material or correspondence from significant individuals. This note is also used for see also references when the **Note Label** “See Also:” is used.	Contains correspondence and reports related to Art Center, Inc. See Also: Box 2, Folder 8 - Clear, Charles "Val". 1950-1952	No. Typically used on file-level.
Physical Facet *Item-level field maps to Digital Object record.*	This field should include information about the genre of material; medium, support, additional physical features; and leaf-count (Getty AAT). Note black-bordered stationary, the presence of drawings, etc.	Manuscript. Ink on paper, postage stamp. One leaf.	No. Typically used on item-level.
Physical Characteristics and Technical Requirements *Item-level field maps to Digital Object record.*	Used to indicate physicals aspect of the item that may require preservation, conservation, impact or impede access, or require special care on the part of the archivist. For any physical characteristic that *prevents* access, use the **Conditions Governing Access Note** instead.	Torn and creased. Repaired with adhesive tape. Folded. Water damage. Acid migration. Requires cart to transport.	No. Typically used on item-level.
General Physical Description	Used as a catch-all for anything relating to the physicality of the item that does not fit into the **Physical Facet** or **Physical Characteristics and Technical Requirements** notes.		No. Typically used on item-level.

IV.G. Finding Aid Data

This tab is only available on the resources level and is the data entry point for fields relating to finding aid managemenet and production.

Resources functional area: Finding Aid Data



The fields in this tabdo not need to be filled out until the finding aid is complete. The ruse regarding data entry are ubject to change until web delevery protocol is addressed by the Digital Media departmnet. Following is a data dictionary for the fields in the Finding Aid Data tab.

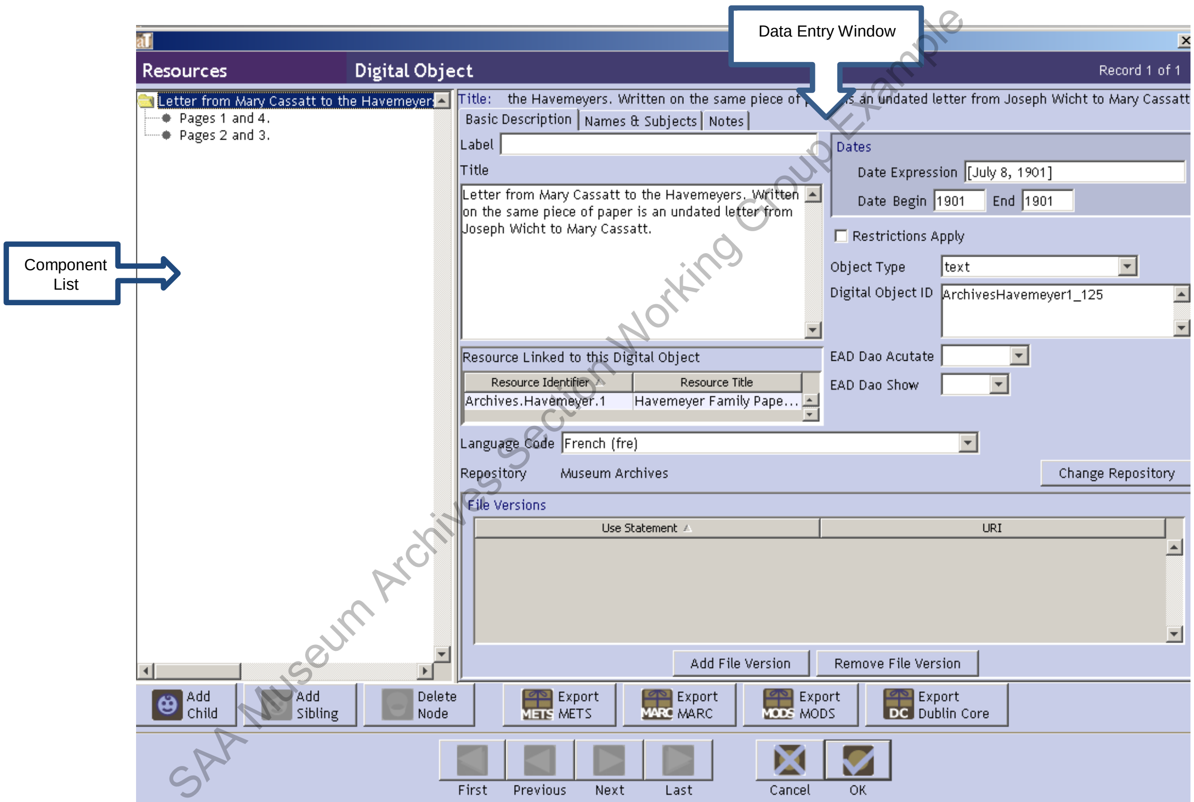
Field	Description	Examples	Mandatory?
EAD FA Unique Identifier	A unique identifier for the finding aid. May be the same as or part of the title of the EAD document.	N/A	Yes (currently N/A).
EAD FA Location	A URI for where the online version of the finding aid is located.	N/A	Yes, after the EAD document has been uploaded (currently N/A).
Finding Aid Title	The title of the finding aid, which may differ from the title of the resource.	Finding Aid to the Richard F. Bach Records, 1913-1953	Yes.
Finding Aid Subtitle	A subtitle title of the finding aid, if one exists.		No.
Finding Aid Filing Title	Title elements, usually with personal names inverted, to enable sensible browsing and sorting of finding aids online.	Bach, Richard F., Records, 1913-1953	Yes.
Finding Aid Date	The date the finding aid was completed. Month and year is sufficient.	April, 2009	Yes.
Author	The author(s) of the finding aid. Collection processors should also be listed here.	Collection processed by Melissa Bowling. Finding aid created by Melissa Bowling and Jim Moske.	Yes.
Description Rules	Primary descriptive standards used in the creation of the finding aid. Typically, DACS.		Yes.
Language of Finding Aid	Primary language of the finding aid.	English.	Yes.
Sponsor Note	If processing was made possible completely or in part by grant funding, credit the sponsor here.		Yes, if grant money contributed.
Edition Statement	Information about the edition of the finding aid.		No.
Series	Information about a monographic series to which the finding aid may belong.		No.
Revision Date	The date any substantial revisions were made to the findings aid. Finding aid revision may happen as a result of full or partial reprocessing, or the addition of new levels of description or digitized material, for example.		No.
Revision Description	Narrative description of revisions to the finding aid. Finding aid revision may happen as a result of full or partial reprocessing, or the addition of new levels of description or digitized material, for example.		No.

Field	Description	Examples	Mandatory?
Finding Aid Status	The status of the finding aid: Completed, In_process, Under_revision, Unprocessed. Only designate as complete when a final EAD document has been generated and uploaded to the website.		Yes.
Finding Aid Note	General information about the finding aid, including notes about the status of data-entry.		No.

V. Digital Objects

Digital object records are typically created as part of formal digitization projects that require collections to be fully processed and described to the item-level in the resources functional area prior to scanning. As part of this workflow, digital objects are generated through the **Instances** field on the item-level resource record. Therefore, the following instructions are for creating digital objects from item-level records in the resources functional area, rather than from scratch through the digital objects functional area.

To create a digital object record, first ensure that the following fields have been entered on the item-level in the resources functional area: **Level**, **Title**, **Date Expression**, **Begin** and **End Dates**, **Language Code**, **Component Unique Identifier**, **Names**, **Language Note** (if needed), **Physical Facet Note**, and **Physical Characteristics and Technical Requirements Note** (if needed). Note that an item can be one letter, pamphlet, clipping, etc. Attachments or enclosures constitute separate items, even if they are filed behind or within another item. Any given item may include multiple leaves or component parts.



To create a linked digital object, click **Add Instance**, and select **Digital object,** and click **OK**. The data entry window for the digital object will appear, with the fields **Title**, **Date Expression**, **Begin** and **End Dates**, **Language Code**, **Names**, **Language Note** (if used), **Physical Facet Note**, and **Physical Characteristics and Technical Requirements Note** (if used) populated with entries from the item-level record. A data dictionary including additional digital object fields on the item-level follows. Note that a digital object can comprise component parts (e.g. multiple digital files associated with one multi-leaved item or items with one leaf with information on recto and verso). Component parts are created by clicking **Add Child** with the item selected in the **Component List**. Components can be rearranged by dragging-and-dropping. The data dictionary for fields in component parts of digital objects follows the item-level dictionary. For technical guidelines for digital projects, consult the “Master Scans and Derivatives” section of the *Metropolitan Museum of Art Archives Scanning Guidelines*.

Digital Objects: Item level

Other mandatory fields discussed above are not listed, as these are automatically transferred to the digital object record when created through the item-level resource record. For details on any of the fields not listed see the data dictionaries for **Resources**.

Field	Description	Examples	Mandatory?
Object type	Description of the format of the source material.	Text	Yes.
Digital object ID	The unique identifying code for the digital object. The ID should adhere to the following format: [CollectionResourceIdentifier (without punctuation)]_[ItemPersistantID]_[Alphabetical Identifier]	ArchivesMarquand1_99 ArchivesMarquand1_99 ArchivesHavemeyer1_159	Yes: System requirement.

Digital Objects: Component Parts

Field	Description	Examples	Mandatory?
Title	Supplied title of the component part. Note that in the case of correspondence the scan will encompass the entire surface of the unfolded page, and each surface may consist of non-sequential pages.	Pages 1 and 4. Pages 5 and 8.	Yes: System requirement.
Date Expression	Full date of original item. Years should always be writen in century formatWhen dates are unknown use n.d. When month and day or known, but year is not, use n.y. Put supplied dates, or parts of dates in brackets. Use a question mark when supplied dates are uncertain. Use the terms between, before and after as appropraite. Cerca dates are indicated with ca. See *Metropolitan Museum of Art Archives Processing Manual* for more detail, but spell out the month in the AT (physical folder notations permit abbreviations.)	1907 June 27, 1977 n.d January 5, n.y. [1997] [March 7?], 1922 [between 1957 and 1960] [before 1910] [after March 1920] [ca. 1860]	Yes: system requirement when inclusive dates are not included.

Begin Date, End Date	Century year of the original item. The year will be the same for in this context, except if the year is unknown by narrowed to a span. In that case the earliest possible year and latest possible year are recorded.	1916 1886	Yes: system requirement when date expression is not provided. If a begin date is used, an end date is required.
Component identifier	The unique identifying code for the component part digital object following the format: [CollectionResourceIdentifier (without punctuation)]_[ItemPersistantID]_[Sequential number of part]	ArchivesMarquand1_88_1 ArchivesMarquand1_88_2 ArchivesHavemeyer1_159_1	Yes.
Language code	Predominant language of component part.	English (Eng)	Yes.
Names	Name of the creator of the original item, with the name link function set to creator.	Boughton, George Henry, 1834-1905	Yes.
Dimensions note	Width and length of source material of component part.	8 13/16 x 7 in.	Yes.