Using accepted standards and descriptive folder titles is essential to creating consistent, reliable, and useful finding aids. The following guidelines will help you as you process your collections and aid in saving time when creating the final finding aid for public access.

**TITLING SERIES, SUBSERIES and FOLDERS**

*Writing Good Titles*

- Writing good titles is extremely important - always think like a researcher - what is in the folder, volume, or document that they need to know. A date, whenever possible is a great enhancement. If it is truly undated, use “undated” as the date expression.
- This is often how researchers will decide if a collection contains information that makes research worth their time, and sometimes travel, to access it.
- Pay attention to your wording and be as accurate as possible.
  - Example: Meeting regarding potato farming in Hastings, Florida, 1995
    Is this a meeting about potatoes farmed in Hastings, Florida, or is it a meeting about potato farming, generally, which was held in Hastings, Florida? A researcher may be interested in only one of these topics and an unclear title such as this one may be misleading, resulting in a researcher wasting time or missing useful information altogether.
- Abbreviations: Try not to use abbreviations - few are absolutely standardized and it is best to avoid possible ambiguities.
  - Common words and abbreviations you may not think about:
    - memo = memorandum (plural: memoranda)
    - info = information
    - misc = miscellaneous (try to avoid this word unless the rest of your title or series is more descriptive)
    - & = and (except for instances where the ampersand is part of a business name or similar, such as AT&T, Florida A&M University)
    - # = number
    - etc. = et cetera (try to avoid this too)
  - Exceptions:
    - St., Jr., and Ft. and similar in city and person names
    - U.S. (United States) and D.C. (Washington, D.C.) (note the use of periods in these); Please write out state names if possible.
    - Degrees: B.A., M.A., Ph.D. (note the use of periods in these)
- Acronyms: Do not use acronyms without describing them fully the first time they are used.
  - Use acronyms sparingly: With electronic finding aids, researchers may jump to a portion of the finding aid without reading all of the notes. If you have a series title that has an acronym, make certain that you include the full name in the series title, in addition to the acronym. Example: Florida Economic Development Council (FEDC)
  - If using an acronym and pluralizing it, make it a small ‘s’ and don’t use an apostrophe. (e.g., PACs, EISs, EAs)
- Capitalization: Use sentence structure – capitalize the first word and proper titles or names. DO NOT capitalize every word.
- Initials: Put a space after each period in a name (J. R. R. Tolkien). For places, do not use a space (U.S., D.C.).
- Possessive case: If a word is singular, but ends in ‘s’, you still need to add ’s in the possessive case (e.g., Lawton Chiles’s notebooks).
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- Hyphens: Use a space on either side of a hyphen when used to separate ideas; do NOT use spaces in hyphenated words or time/date spans.
- Spaces: Don’t put extra spaces within parentheses (for example) ( not like this ), or before a colon (Like: this; Not : this)
- Commas: Please use the Oxford comma (comma used before the conjunction, e.g., one, two, and three) as it helps clarify your intention.
- Pluralization: An apostrophe is not used to pluralize a noun, date, or acronym (e.g., EAs, 1980s) and in cases of doubt (e.g., thank yous), please use a different phrase (e.g., thank you notes, thank you letters)
- Avoid the use of Miscellaneous whenever possible.
  - Miscellaneous - adjective 1. Consisting of members or elements of different kinds; of mixed character: a book of miscellaneous essays on American history. 2. Having various qualities, aspects, or subjects: a miscellaneous discussion.
  - What does “miscellaneous” mean to you? A big mess you don’t really know how to describe or how to handle?
  - If you absolutely must use the term “miscellaneous” as a series or folder title, please write a description that includes at least a list of the types of materials included therein (e.g., Miscellaneous financial materials).
- Data Entry Tips (for when you type the information into an Excel sheet or Archivists’ Toolkit):
  - Do not put punctuation at the end of your collection, series, subseries, or folder titles. Needed punctuation between fields (such as title and date) can be added through a style sheet where needed.
  - Be careful that you do NOT add unnecessary spaces after the folder titles and dates as this can cause additional spaces when entries are merged through a style sheet.
  - You can add formatting to your notes and series/folder titles, but it is not a quick and easy process. Therefore, whenever possible, make formatting decisions during the data entry process rather than waiting for the end.
    - Italicize the titles of published and significant works in the notes and the series/folder titles. When writing titles on folders, underline the words that should be italicized in the final version. When entering data, surround italicized words as such:
      <emph render="italic">Title Name Here</emph>
  - For smaller works, such as essays or journal articles, surround the title in quotation marks: “Title Name Here”
  - Elements that are bolded are generally handled through the style sheet (such as Section or Series titles), but should you find the need to bold text within a note or folder title, it is similar to the italics coding:
    <emph render="bold">Bold text here</emph>

Dates (DACS Compliant)

- Inclusive Dates:
  - Use this: 1849-1851 (no spaces around the dash)
  - NOT 1849-51
- If the collection continues to accrue, place the most recent accrual in the date span:
  - 1965-2009
  - (NOT 1965- OR 1965- (Ongoing)
- Bulk Dates:
  - 1785-1960, bulk 1916-1958
  - When entering this data in the Excel sheet, there are separate cells for inclusive and bulk dates.
- Significant Gap in Records:
  - 1827, 1952-1978
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- Estimated Date Ranges:
  - approximately 1952-1978 OR circa 1870-1879
- Single Dates:
  - 1975
  - 1975 March-August
  - 1975 March 17
- Estimated Single Dates:
  - probably 1967
  - approximately 1967
  - before 1967
  - after 1967 January 5
  - 1967 or 1968
  - 1960s
  - circa 1975 August
- No Dates:
  - undated
- Data Entry Tips (for use with Excel EAD sheet):
  - Use “Inclusive” and “Bulk” dates ONLY when you have a span of years.
  - Use “Date Expression” for any other date including a single date, undated, or a span of dates that includes more information than two years (example: 1906 March-1907 September)
  - Even if the date is serving as a title, place the dates in the appropriate date fields, not the title field. This is important for searching once the finding aid is completed.

Most importantly – BE CONSISTENT with whatever choices you make.

FINDING AID NOTES

Biographical/Historical Note, Scope and Content Note, and Abstract
- This is the place for the collection’s importance and uniqueness to really shine.
- This is another opportunity for the researcher to determine if the collection contains information that makes research worth their time, and sometimes, travel.
- If you use any other work to create the notes, make certain that you cite the source using the Chicago Manual of Style and place it in a Bibliography note.
- Frequently, you will not be able to find/include all of the following types of information - but the more you have, the better!

Biographical or Historical Note

- This note is about the subject of the collection, USUALLY the creator, who may be a person, institution, or business. Sometimes, the creator may be a collector and then the bio/historical note will focus on that which the creator collected with some information about the creator.
- This note should cover the general scope of the person or business, but it should focus on the aspect of the person, institution, or business that is reflected in the collection.
- In every biography and historical note, the following should be included:
  - Name: This may include titles, married names, aliases, pseudonyms, common or popular names, acronyms (if an institution or business), and changes of name.
  - Geographic location(s): Birthplace, place of business, etc.
  - Birth/death dates (as exact as possible) OR Business operation dates
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- This is almost always different from the collection dates as the collection may document only a fraction of a person’s life or a business’s operation.
  o Education: Where was the person educated, what degrees were earned, the dates at an institution, etc.
  o Type of business conducted by the person, institution, or company
  o What is the person, institution or company known for, or why is the person, institution, or company important? How do they fit into the general context of history?
  o Relationships (parentage, marriage, business partners, etc.) found in the collection

**Scope and Content Note**

- This note is about the contents of the collection.
- This is a place to discuss highlights, obvious gaps in records, or unique perspectives on the topic of the collection.
- In every scope note, the following should be included:
  o Types of materials found in the collection (genres or documentary forms), such as minutes, diaries, reports, water colors, documentaries, etc. Specifics can be added:
    - Example: Included in the collection are diaries describing day-to-day activities as well as nationally important events, such as the signing of the Constitution of the United States of America in 1787 and Philadelphia’s Yellow Fever Epidemic in 1793.
  o Main subjects (use your best judgment)
  o All series titles and subseries titles, if applicable
  o Areas of the collection that are particularly rich with information
  o How the collection is arranged
  o Dates
    - Spans of the records, dates of events, or extremely important time frames within the creators life or business operations
    - Example: If you are referring to Picasso’s Blue Period, note the dates: 1900-1904
  o Formats
  o Functions or activities resulting in the creation of the records
  o How the collection may be useful to researchers (this is really the highlights section)
    - Example: Researchers interested in colonial medicine may find the diaries, which include entries on treating yellow fever, to be useful.
- In narratives, use normal date order such as July 22, 2009.
  o When describing a span, do not use spaces around the hyphen: 1945-1947 and do not abbreviate: NOT 1945-47. However, “from 1945 to 1947” is preferred.

**Abstract**

- The abstract is a brief and tidy statement that sums up the collection. Usually, it includes the most basic and important information from the bio/historical note and the scope and content note.
- It is useful for providing researchers with the most essential facts about the collection.
- You should describe the collection in just a few sentences:
  o Who or what is the collection about?
  o What is contained in the collection?
  o Include the most important keywords
- In general, the abstract can be formed by combining the first paragraph of the bio/historical note and the first paragraph of the scope and contents note, and then editing down to the basics.