Creating a New Resource Record (Finding Aid)

This guide details the process of creating a new Resource Record (Finding Aid). See the guide for Editing an Existing Resource Record (Finding Aid) if you need to make changes to an existing finding aid. This guide is to be used when filling out the collection level description portion of the finding aid. Please send a separate excel inventory to the Processing Archivist containing the contents list.

**BASIC INFORMATION**

- **Title**: Remove “PLACEHOLDER - “ and confirm pre-populated title is accurate
- **Identifier**: Pre-populated
- **Level of Description**: This will almost always be “Collection” and is pre-populated. University Archives may need to change this field to “Series”
- **Resource Type**: Not used by UF
- **Language**: Select the predominate language of the collection. Default is English. If the collection contains materials from multiple languages, select “Multiple Languages.” You will be able to add a note further describing them later
- **Publish**: Leave unchecked
- **Restrictions**: If the collection has any access or use restrictions check this box
- **Repository Processing Note**: Not used by UF

**DATES**

- Dates will be pre-populated based on accession information. You will need to update the date to reflect information gathered during processing
- Dates can be entered in four different ways:
  - If the collection is a single date select “Single” from the “Type” and enter the date in the “Begin” field (i.e., Begin =1865)
  - If the collection is a date range, select “Inclusive Dates” from the “Type” and enter the dates in the “Begin” and “End” fields (i.e. Begin =1861 and End =1868)
  - If the collection is a date range, but a majority of the materials are from a date range within the larger range, select “Inclusive Dates” and complete the above step. THEN, click on “Add Date” and select “Bulk Dates” and put the Begin and End bulk dates in the fields.
  - If the collection has circa dates, single dates that are non-contiguous, date ranges that are non-contiguous, or a combination of these, they may be entered in the Date Expression field (i.e. 1929, 1932, undated or circa 1850 or 1861-1865, 1870-1871). You may also use this field for “undated” for collections that do not have a clear date. However, “Date Expression” makes searching by date more difficult so whenever possible, try to conform dates to a Begin and End period.

**EXTENTS**

- The extent will be pre-populated based on accession information. You will need to update the extent to reflect changes after processing
- **Portion**: Will almost always be “Whole”
- **Number**: Input the size of the collection in Linear Feet
- **Type:** Unless you are dealing with materials not in boxes or materials in specific media formats, this will usually be “Linear Feet”
- **Container Summary:** Input the number of boxes, folders, rolls, etc. (i.e. 3 Boxes or 5 Boxes, 2 Oversize Folders, 3 Rolled Tubes)

**FINDING AID DATA**

- **EAD ID:** Pre-populated
- **EAD Location:** Leave blank for Processing Archivist
- **Finding Aid Title:** Pre-populated
- **Finding Aid Subtitle:** Not used by UF
- **Finding Aid Filing Title:** Not used by UF
- **Finding Aid Date:** [Month] [Year] (i.e. March 2018)
- **Finding Aid Author:** “Finding aid created by [insert your name or the name of the student who processed the collection and created the finding aid]”
- **Description Rules:** Pre-populated
- **Language of Description:** Pre-populated
- **Sponsor:** Insert statement about sponsor if applicable
- **Edition Statement:** Not used by UF
- **Series Statement:** Not used by UF
- **Finding Aid Status:** Change to “In Progress”
- **Finding Aid Note:** Not used by UF

**REVISION STATEMENTS**

- Only use this after editing an existing finding aid. See the guide for editing finding aids for more information

**RELATED ACCESSIONS**

- Pre-populated (if adding an accession, confirm the new accession is also listed)

**AGENT LINKS** (A project is currently ongoing to clean up our Agent and Subject Heading records)

- Agents refer to creator(s) and relevant subjects (persons, family names, and corporations)
- **Select “Add Agent Link”**
- **Select the role (Creator or Subject *do NOT use source*)**
- **Relator is not required**
- **Search for the relevant agent name in the “Agents” box. In most cases the creator will already have a record created during the accessioning process. If you cannot locate the agent you may also select the dropdown arrow and browse**
- **If you still cannot locate the agent, please notify the processing archivist with a list of agents and subjects you would like to link to**

**SUBJECTS** (A project is currently ongoing to clean up our Agent and Subject Heading records)

- Subjects refer to all controlled access headings other than person names, family names, and corporation names
• Select “Add Subject”
• Search for the relevant agent name in the “Subjects” box. If you cannot locate a subject you may also select the dropdown arrow and browse
• If you still cannot locate a subject, please notify the processing archivist with a list of agents and subjects you would like to link to

NOTES

• ArchivesSpace allows for the use of 29 different notes available in EAD. Although none are technically required, 15 of these are notes we use in our finding aids on a regular basis
• Below is general information to be aware of when adding notes. Description of the notes is broken down into two lists: those used frequently by Special Collections that will be auto populated to appear and those used as needed

General Information on Adding Notes

• Choose a note from the drop-down list and a box will appear. Each note has a “Note Type,” a “Label,” and “Content”
• To delete a note, click the “X” in the corner of the note. ArchivesSpace will confirm before deleting the note
• There is a “Publish?” box associated with each note. By default, when you publish a finding aid, notes will be published. If, after a finding aid is published, there is a note that should be suppressed, you can uncheck the “Publish?” box for the note and sub-note to make it private
• You may copy and paste text from another source or create the note directly in the “Context” field, this may be wise as there is no spell check (coming with future update!)
• Hitting the “Enter” key TWICE will differentiate between paragraphs in any note. When the notes are exported to EAD, they will appear in a separate paragraph tags (<p> </p>)
• External links (such as to another finding aid for a related collection) must be added manually. To do this replace the text you would like to link from with this tag: <extref xlink:type="simple" xlink:href="insert link to website">insert text to link from</extref>
• Emphasizing text must also be done manually, to display text as bold or italic wrap the text with <emph render="bold or italic">insert text</emph>
• Italicizing a publication title: If italicizing a major work such as a book, instead wrap the title text with <title render="italic">insert title text</title>

Frequently Used Notes

Notes contain both a “Type” and a “Label.” In the two sections that follow, the notes will be listed as “Type (Label).” You should select the “Type” and then fill in the “Label.”

• Abstract (Abstract): Short description of the collection
• Biographical / Historical (Biographical/Historical Note): Information about the collection’s creators and/or subjects
• Scope and Contents (Scope and Content): Information about the materials in the collection
• Conditions Governing Access (Access): Pre-populated as “The collection is open for research.” Insert restrictions as needed.
• Physical Location (Physical Location): Pre-populated as “University of Florida Smathers Library Building.” If collection is to be located at ALF indicated “Please note that this collection is housed in the Auxiliary Library Facility off campus and will require advance notice for timely retrieval. Please contact the Special and Area Studies Collections department prior to your visit.”
• Preferred Citation (Preferred Citation): Pre-populated with “[Identification of item], XXX, Special and Area Studies Collections, George A. Smathers Libraries, University of Florida, Gainesville, Florida.” Replace “XXX” with collection title.
• Immediate Source of Acquisition (Acquisition Information): Statement about when and how the collection was acquired.
• Arrangement (Arrangement): Information about the series and how materials are arranged

Additional Notes Used as Needed

Notes contain both a “Type” and a “Label.” In the two sections that follow, the notes will be listed as “Type (Label).” You should select the “Type” and then fill in the “Label.”

• Language of Materials (Language of Materials): If the collection contains materials in multiple languages this note may be used to list additional languages. (i.e. “Includes materials written in <language langcode="eng">English</language>, <language langcode="heb">Hebrew</language>, <language langcode="pol">Polish</language>.”) Be sure to include language encoding. See a list of language codes here.
• Existence and Location of Copies (Alternative Format Available): “Digital reproductions of selected items in the [insert name of collection] are available online via the <extref xlink:type="simple" xlink:href="insert UFDC landing page link">University of Florida Digital Collections (UFDC)</extref>. Please read the <extref xlink:type="simple" xlink:href="http://ufdc.ufl.edu/permissions">Permissions for Use</extref> statement for information on copyright, fair use, and use of UFDC digital objects.”
• Related Materials (Related Material): May be used to indicate related collections available
• Processing Information (Processing Notes): Include any unusual circumstances that affected processing
• If you would like to use other notes, please consult with processing archivist

EXTERNAL DOCUMENTS

• Not used by UF (speak with processing archivist)

RIGHTS STATEMENT

• Not used by UF

INSTANCES

• Not used by UF

DEACCESSIONS

• Speak with Processing Archivist if deaccessioning

COLLECTION MANAGEMENT
• Not used by UF (handled in the accession module)

CLASSIFICATIONS

• Not used by UF